

Death Periodic Data Matching (PDM) Operations Update



*Center for Consumer
Information & Insurance
Oversight (CCIIO)*

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<https://www.regtap.info/FFENR.php>

The information provided in this presentation is not intended to take the place of the statutes, regulations, and formal policy guidance that it is based upon. This material summarizes current policy and operations as of the date it was uploaded to REGTAP. Links to certain source documents may have been provided for your reference. We encourage persons taking the course to refer to the applicable statutes, regulations, and other interpretive materials for complete and current information

New Outbound 834 (FFE to Issuer) AMRCs Used Exclusively for Death PDM

- If a current enrollee has been verified to be deceased through the Death PDM process, and has not responded to noticing sent by CMS, the following code combinations will be sent on an Outbound 834 to the Issuer to identify the policy as *Terminated* or *Cancelled* by the FFM.

IF Maintenance Type Code (INS03)	AND Maintenance Reason Code (INS04)	AND Additional Maintenance Reason Code (2750 Loop)	THEN Transaction Type (derived by FFE)
024	03	TERM-PDM or CANCEL-PDM	TERMINATED or CANCELLED

New Outbound 834 (FFE to Issuer) AMRCs Used Exclusively for Death PDM

- Term and Cancel dates on 834s for Death PDM
 - Termination: in cases where a member had an active span of coverage, the term date=date of member's death
 - Cancellation: in cases where a member's coverage was never effectuated (policy still in initial status), the cancel date=policy effective date
- CMS sent termination and cancellation 834s using these codes to applicable issuers on 10/11, 10/14, and 10/16. Issuers should process these terminations and cancellations as soon as possible as not to cause a mismatch between FFM and issuer data.

Additional Resources for Death PDM

- Comprehensive Slide Deck on Death Periodic Data Matching:
https://www.regtap.info/reg_librarye.php?i=2967
- Help page for consumers/estates receiving Death PDM warning notices:
<https://www.healthcare.gov/help/estate>
- HealthCare.gov instructions on ending Exchange coverage: <https://www.healthcare.gov/reporting-changes/cancel-plan/>
- Sample Death PDM notices:
<https://marketplace.cms.gov/applications-and-forms/notices.html>