Centers for Medicare & Medicaid Services

Cost-sharing Reduction Reconciliation Contact Database

Web Form Guide

March 2018

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Resources

The following Cost-sharing Reduction Reconciliation (CSR Recon) Contact Database resources are available for review or download:

- Cost-sharing Reduction Reconciliation Contact Database web form: https://acapaymentoperations.secure.force.com/CSRReconContactDatabase/
- EDGE Server Contact Database: https://acapaymentoperations.secure.force.com/EdgeContactDatabase

1 Introduction

In an effort to maintain an accurate list of contacts for each applicable Health Insurance Oversight System (HIOS) ID, the Centers for Medicare & Medicaid Services (CMS) requests that Chief Executive Officer (CEO) Designates or Alternate CEO Designates provide and maintain CSR Recon contacts. This information helps CMS ensure that the appropriate individuals are contacted for business and technical matters related to CSR Recon.

The Cost-sharing Reduction Reconciliation Contact Database web form allows CEO Designates and Alternate CEO Designates to add, replace, and edit Cost-sharing Reduction Reconciliation business and technical contact information for their companies. Each HIOS ID must be assigned one (1) business contact and one (1) technical contact. Individuals may be assigned as a contact to multiple HIOS IDs, but the same individual cannot be both the business and technical contact for the same HIOS ID.

The contact database reporting process must be completed in one (1) session; however, the option to return to the web form to add, edit, and replace contact information is provided with the use of your EDGE Server Contact Database access code. All required contacts and required contact data must be provided to complete the web form.

Note: The web form is optimized for use with Google Chrome™ or Firefox®. Some form features, such as error messaging, may not function properly in Internet Explorer®.

2 Welcome Page

Upon selecting the web form link in the invitation email, you are directed to the Welcome page as shown in Figure 1. Refer to Table 1 to determine how to proceed in the web form.

Figure 1: Welcome Page

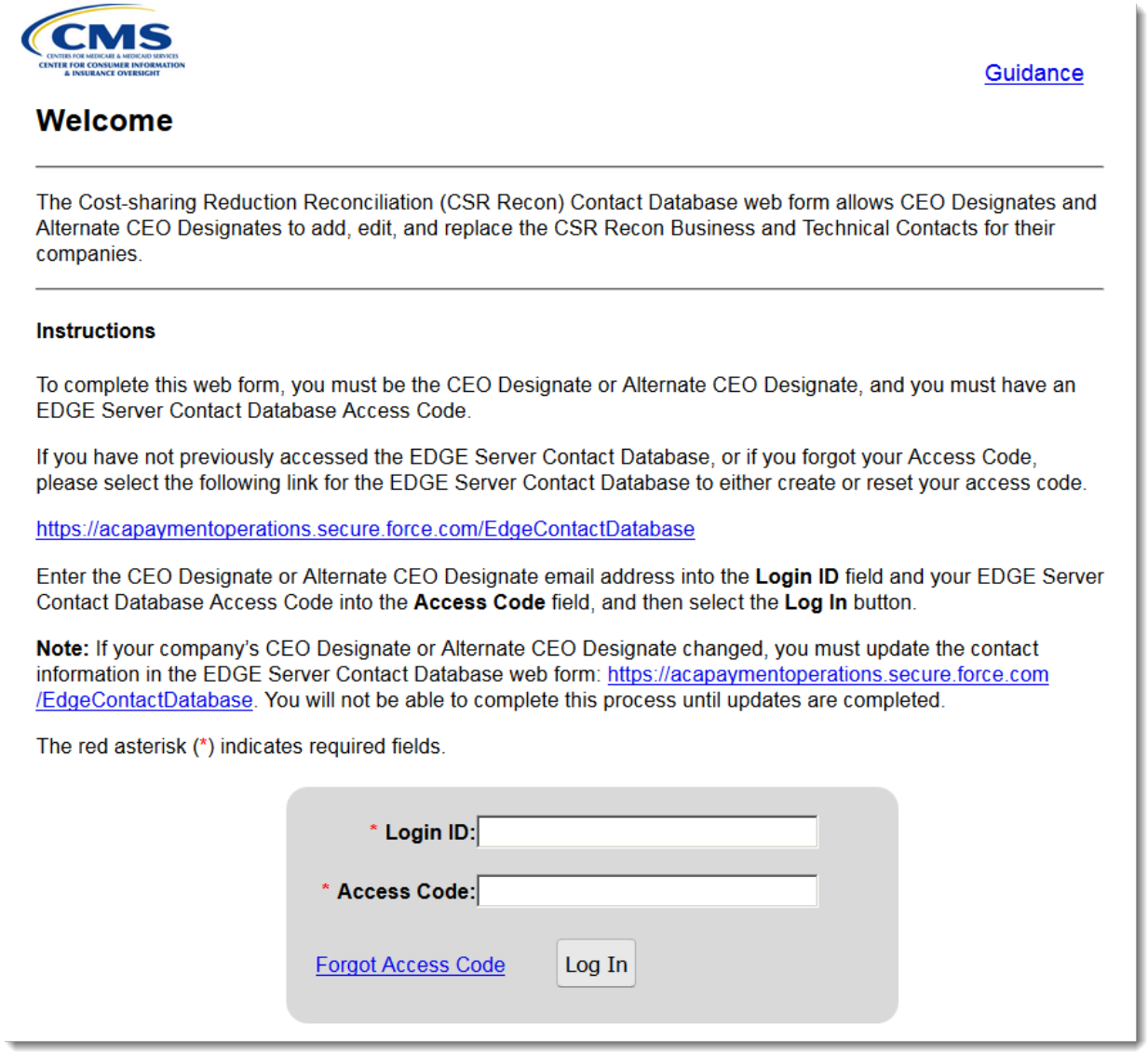


Table 1: Log In Selection

If	Then
You have an EDGE Server Contact Database Access Code,	Proceed to Section 2.1 to log in with the Access Code.

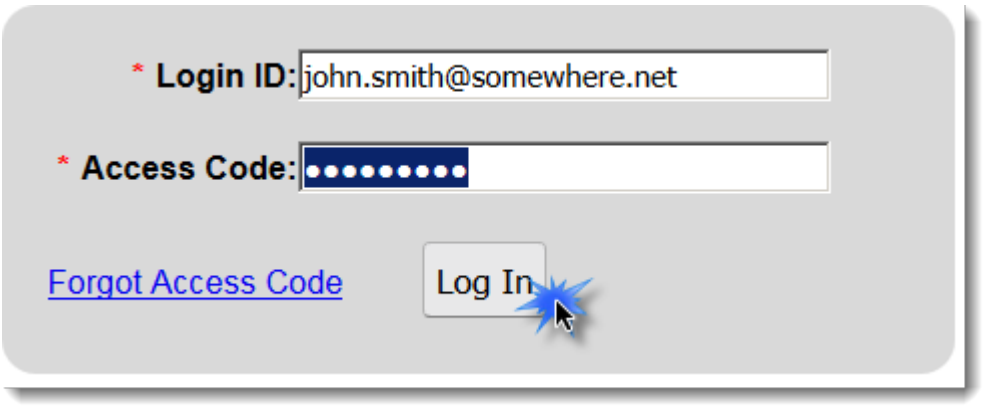
If	Then
You have not created an EDGE Server Contact Database Access Code OR you need to reset your Access Code,	Select the **EDGE Server Contact Database web form** link to create or reset your Access Code.
You have forgotten your EDGE Server Contact Database Access Code,	Select the **Forgot Access Code** link to reset your Access Code.

2.1 Log In With Access Code

Follow these steps to log into the web form using your EDGE Server Database Access Code, as shown in Figure 2:

1. Enter your CEO Designate or Alternate CEO Designate email address in the **Login ID** field.
2. Enter your EDGE Server Contact Database Access Code in the **Access Code** field.
3. Select the **Log In** button to navigate to the CSR Recon Contact Information Summary page.

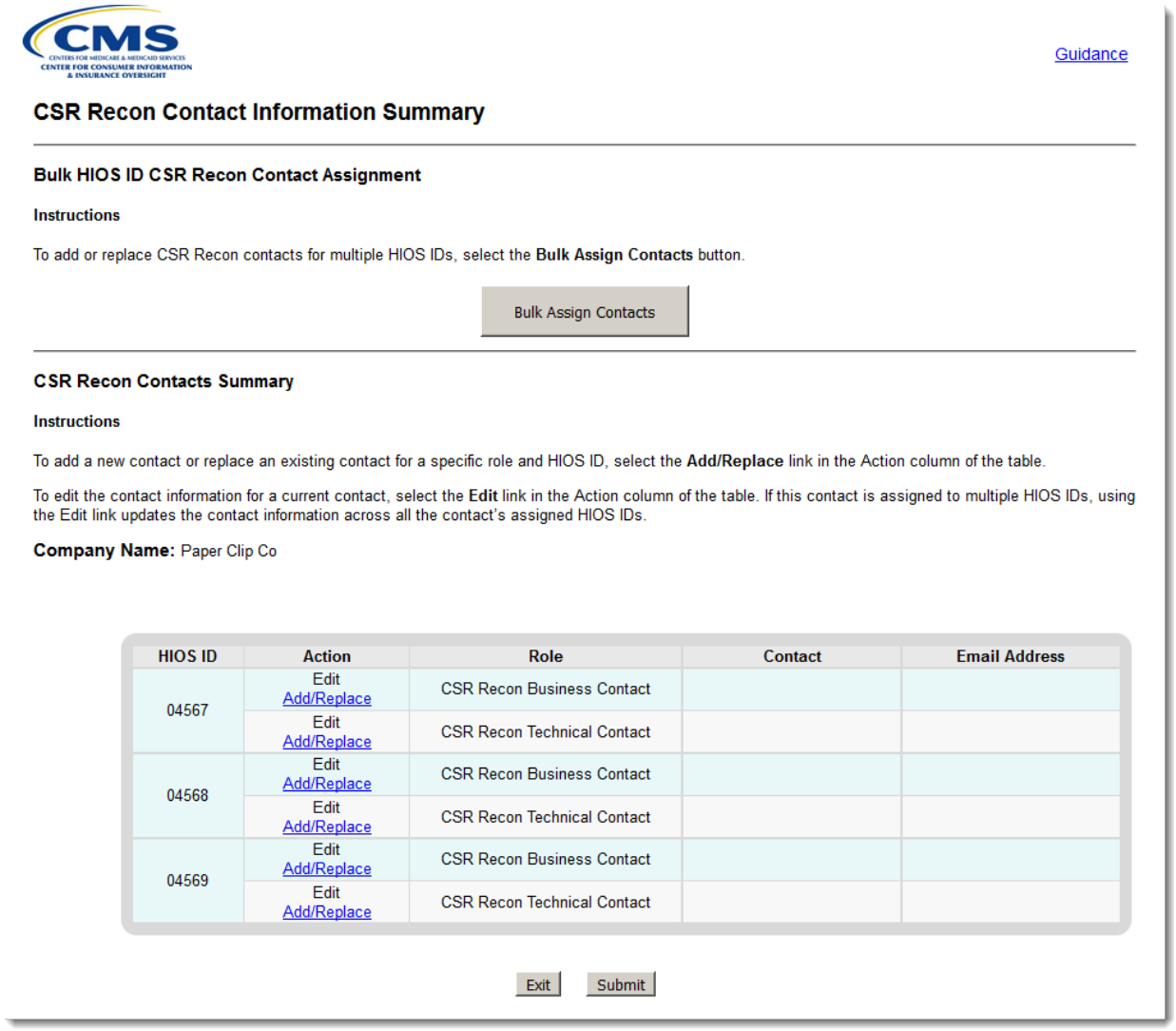
Figure 2: Log In with Access Code



3 CSR Recon Contact Information Summary Page

The CSR Recon Contact Information Summary page, as shown in Figure 3, allows the CEO Designate or Alternate CEO Designate to add or replace CSR Recon contacts for multiple HIOS IDs using the Bulk Assign Contacts button (see Section 3.1). This page also contains the CSR Recon Contacts Summary table, which displays the contacts for each HIOS ID. The table also contains links to add or replace the contact (see Section 3.2), or to edit the contact information for the existing contact (see Section 3.3) by HIOS ID and role.

Figure 3: CSR Recon Contact Information Summary Page

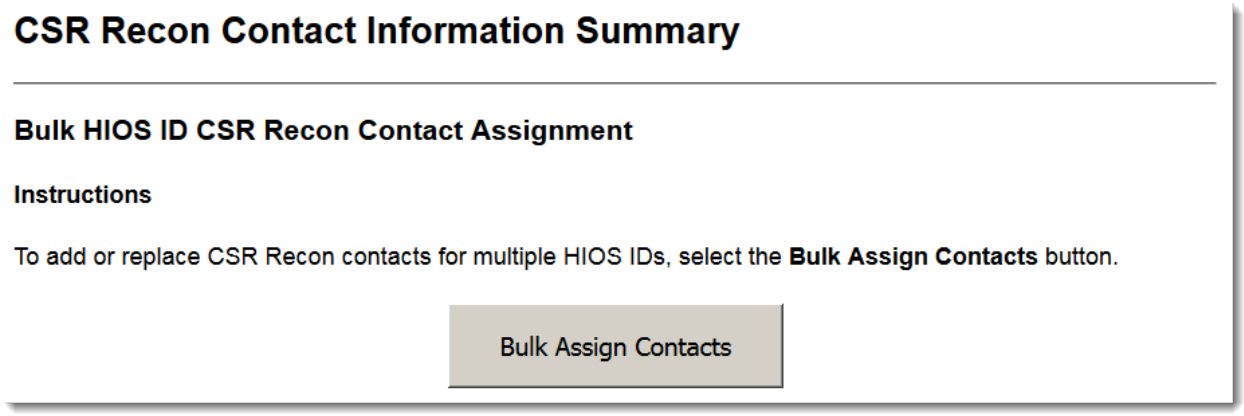


3.1 Bulk CSR Recon Contact Assignment

The Bulk CSR Recon Contact Assignment page allows the user to assign the same contact information to multiple HIOS IDs simultaneously. Follow these steps to add new or replace existing CSR Recon contacts for multiple HIOS IDs:

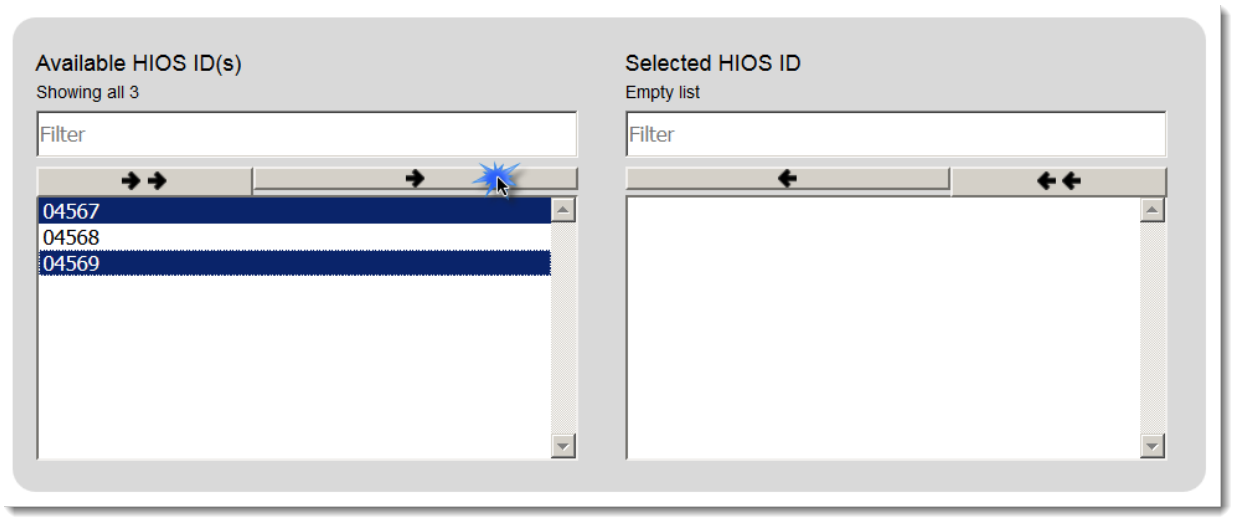
1. Select the **Bulk Assign Contacts** button to navigate to the Bulk CSR Recon Contact Assignment page.

Figure 4: Bulk Assign Contacts Button



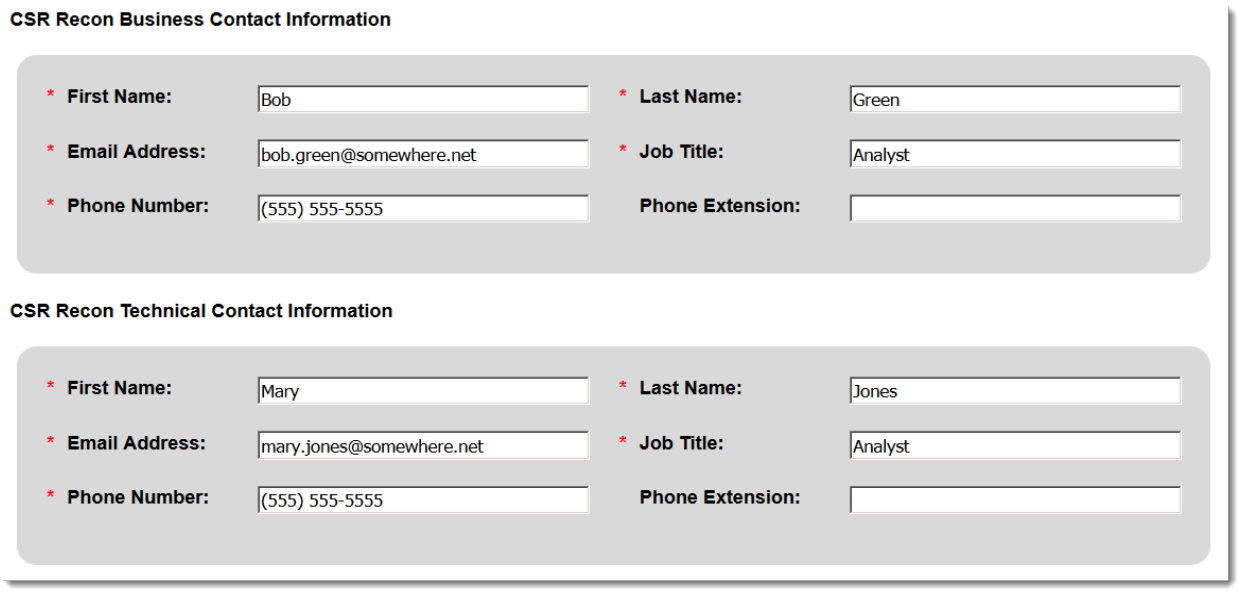
2. Use the arrows above the Available HIOS ID(s) list to move the applicable HIOS ID(s) to the Selected HIOS ID(s) list.

Figure 5: HIOS ID Selection Table



3. Enter the CSR Recon Business Contact Information and the CSR Recon Technical Contact Information for the selected HIOS ID(s):
   - First Name
   - Last Name
   - Email Address
   - Job Title
   - Phone Number
   - Phone Extension (optional)

Figure 6: CSR Recon Contact Information



Note: The CSR Recon Business Contact and the CSR Recon Technical Contact must be different.

4. Select the **Save & Return** button to save your entries and return to the CSR Recon Contact Information Summary page.

Figure 7: Save & Return Button



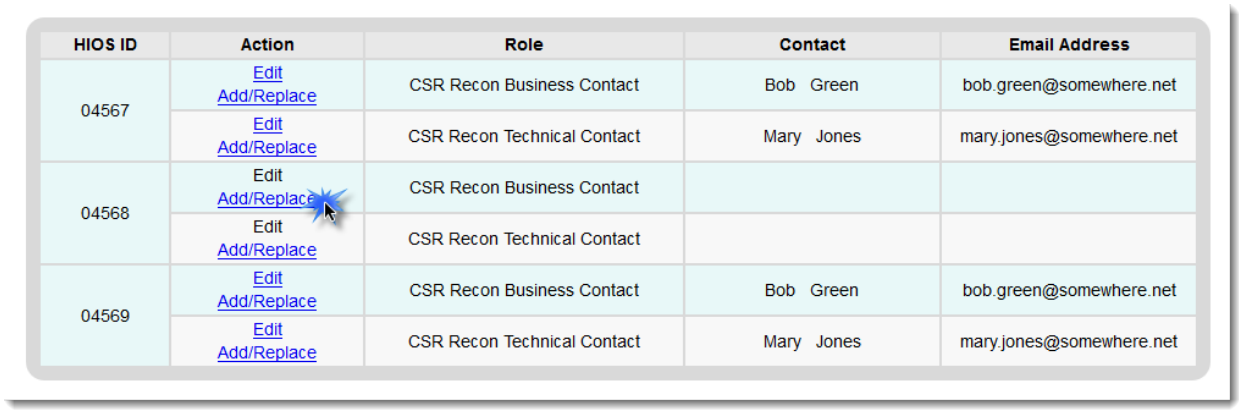
5. Repeat steps 1 through 4 for each set of HIOS IDs for which you need to bulk assign contacts.

3.2 Add/Replace Contact by HIOS ID and Role

The CSR Recon Contacts Summary table on the CSR Recon Contact Information Summary page contains links to add or replace a contact for a specific HIOS ID and role. Follow these steps to add or replace a contact:

1. Select the **Add/Replace** link in the Action column of the CSR Recon Contacts Summary table for the desired HIOS ID and role. The web form navigates to the Add/Replace Contact page.

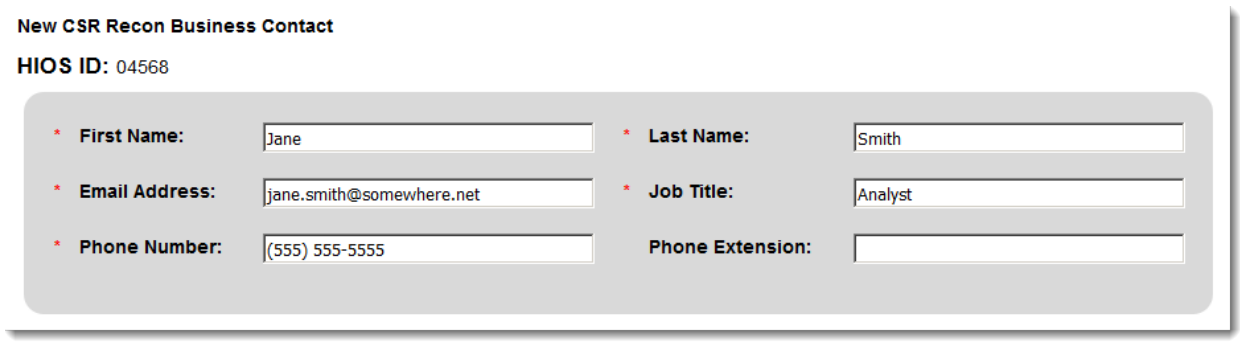
Figure 8: Add/Replace Link



HIOS ID	Action	Role	Contact	Email Address
04567	Edit Add/Replace	CSR Recon Business Contact	Bob Green	bob.green@somewhere.net
	Edit Add/Replace	CSR Recon Technical Contact	Mary Jones	mary.jones@somewhere.net
04568	Edit Add/Replace	CSR Recon Business Contact		
	Edit Add/Replace	CSR Recon Technical Contact		
04569	Edit Add/Replace	CSR Recon Business Contact	Bob Green	bob.green@somewhere.net
	Edit Add/Replace	CSR Recon Technical Contact	Mary Jones	mary.jones@somewhere.net

2. Enter the Contact Information for the selected HIOS ID and role:
   - First Name
   - Last Name
   - Email Address
   - Job Title
   - Phone Number
   - Phone Extension (optional)

Figure 9: Add/Replace Contact Information



3. Select the **Save & Return** button to save your entries and return to the CSR Recon Contact Information Summary page.

Figure 10: Save & Return Button



4. Repeat steps 1 through 3 for each contact you wish to add or replace.

3.3 Edit Contact Information

The CSR Recon Contacts Summary table on the CSR Recon Contact Information Summary page contains links to edit the contact information for an existing contact. If this contact is assigned to multiple HIOS IDs, editing the contact for one (1) HIOS ID and role updates the contact information across all the contact's assigned HIOS IDs and roles.

Note: If the First Name, Last Name, and Email Address fields for a contact all require editing, use the Add/Replace process (see Section 3.2) instead of the Edit Contact Information process.

Follow these steps to edit contact information:

1. Select the **Edit** link in the Action column of the CSR Recon Contacts Summary table for the desired HIOS ID and role. The web form navigates to the Edit Contact Information page.

Figure 11: Edit Link

HIOS ID	Action	Role	Contact	Email Address
04567	Edit Add/Replace	CSR Recon Business Contact	Bob Green	bob.green@somewhere.net
	Edit Add/Replace	CSR Recon Technical Contact	Mary Jones	mary.jones@somewhere.net
04568	Edit Add/Replace	CSR Recon Business Contact	Jane Smith	jane.smith@somewhere.net
	Edit Add/Replace	CSR Recon Technical Contact	Alice White	alice.white@somewhere.net
04569	Edit Add/Replace	CSR Recon Business Contact	Bob Green	bob.green@somewhere.net
	Edit Add/Replace	CSR Recon Technical Contact	Mary Jones	mary.jones@somewhere.net

2. Edit the existing contact information as needed:
   - First Name
   - Last Name
   - Email Address
   - Job Title
   - Phone Number
   - Phone Extension (optional)

Figure 12: Edit Contact Information



3. Select the **Save & Return** button to save your entries and return to the CSR Recon Contact Information Summary page.

Figure 13: Save & Return Button



4. Repeat steps 1 through 3 for each contact you wish to edit.

4 Submit the Web Form

Once all changes are complete, follow these steps to submit the web form:

1. Select the **Submit** button on the CSR Recon Contact Information Summary page to submit the information to CMS.

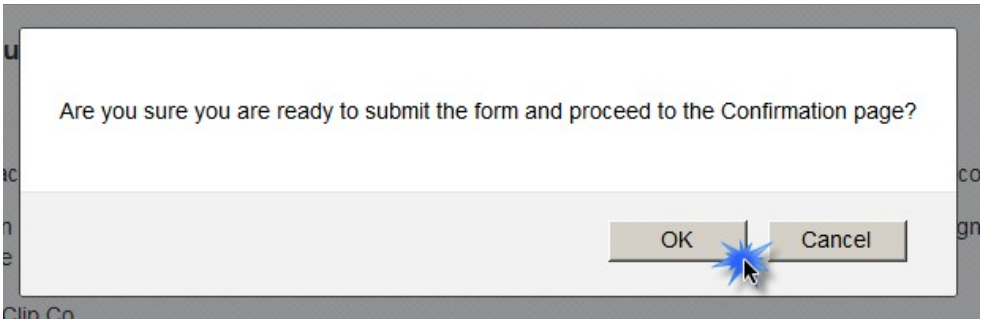
Note: Each HIOS ID must have a business and a technical contact assigned prior to submission. CEO Designates and Alternate CEO Designates may return to the form as needed to replace contacts and edit contact information.

Figure 14: Submit Button



2. Select the **OK** button for the pop-up question "Are you sure you are ready to submit the form and proceed to the Confirmation page?" The web form navigates to the Confirmation page.

Figure 15: Confirmation Pop-up



5 Confirmation Page

An acknowledgement email is sent to the CEO Designate, Alternate CEO Designate, and any new contacts that have been added during the session. Please save and print the PDF available on the Confirmation page, as shown in Figure 16, for your records. The PDF will not be included with the email, so it is recommended to print it from this page before closing the browser. Follow these steps to save/print the confirmation:

1. Select the **PDF** button to save/print the confirmation for your records.
2. Once the Confirmation is printed and/or saved, select the **Exit** button to exit the web form.

Figure 16: Confirmation Page

