Cost-Sharing Reduction Reconciliation Methodology for the 2016 Benefit Year Web Form Guide

Introduction

The Centers for Medicare & Medicaid Services (CMS) needs to collect the Cost-Sharing Reduction (CSR) reconciliation methodology that issuers will use to submit data. Issuers must notify CMS if they intend to use the simplified methodology or the standard methodology for the 2016 benefit year.

To facilitate the collection of this information, CMS developed the CSR Reconciliation Methodology web form for issuers to submit their methodology for the 2016 benefit year. The CSR Reconciliation Methodology web form link will be announced via the Registration for Technical Assistance Portal (REGTAP) [https://www.regtap.info/]. Please monitor REGTAP for the CSR Reconciliation Methodology web form availability.



If an issuer does not submit the CSR Reconciliation Methodology web form for all of its HIOS IDs, the HIOS ID methodology will default to the methodology used in 2015.

The web form also allows technical points of contact to be added for each HIOS ID for which a CSR reconciliation methodology is reported. Technical points of contact are used for CSR reconciliation-related outreach.

This document is a step-by-step guide to log in, complete, and submit the web form. The window for reporting the 2016 benefit year CSR reconciliation methodology is from Tuesday, February 7, 2017 to 11:59 p.m. ET on Monday, March 13, 2017 and from Monday, April 3, 2017 to 11:59 p.m. ET on Wednesday, May 30, 2017.

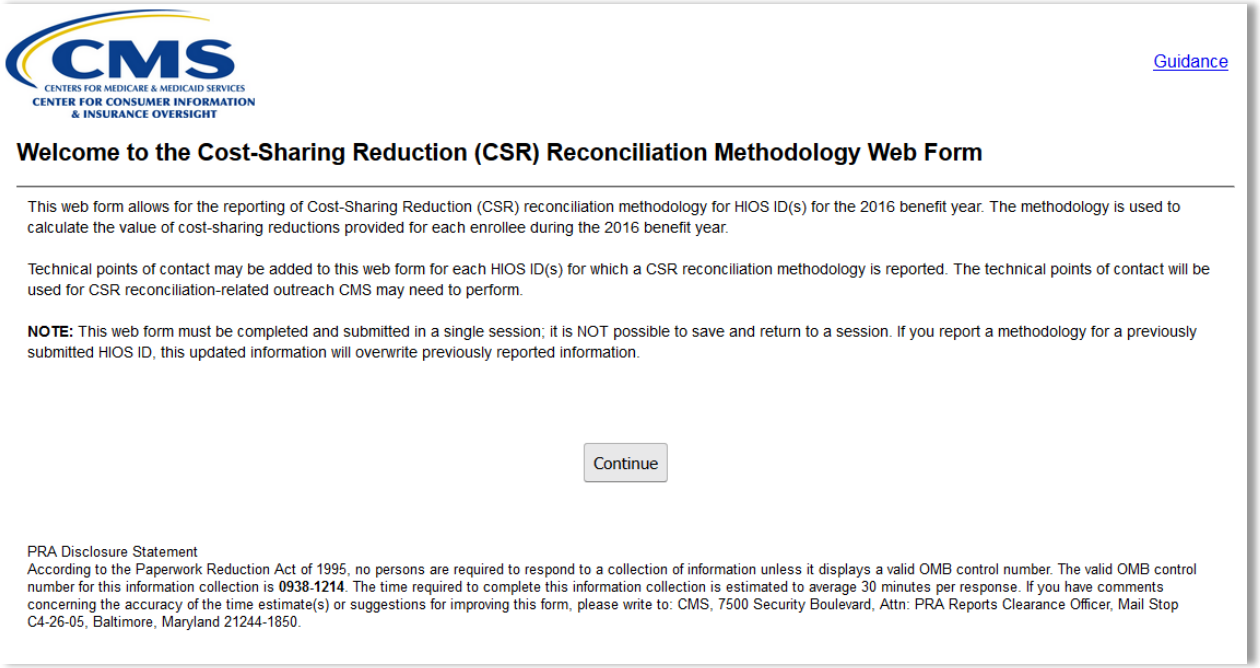


The CSR Reconciliation Methodology web form **must be completed in a single session**; therefore, we suggest you collect all necessary information before initiating the process. Information cannot be saved in the web form; however, submitters will be able to report their methodology for a subset of HIOS IDs in one session and for an additional subset of HIOS IDs in a different session.

1 Welcome Page

Upon selecting the web form link, you are directed to the Welcome page, as displayed in Figure 1. The Welcome page provides general information regarding the purpose of the web form. Select the **Continue** button to proceed.

Figure 1: Welcome Page



2 Contact Information Page

The Contact Information page requires Submitter and the Alternate Contact information (refer to Figure 2). The Submitter and Alternate Contacts **must** be different.

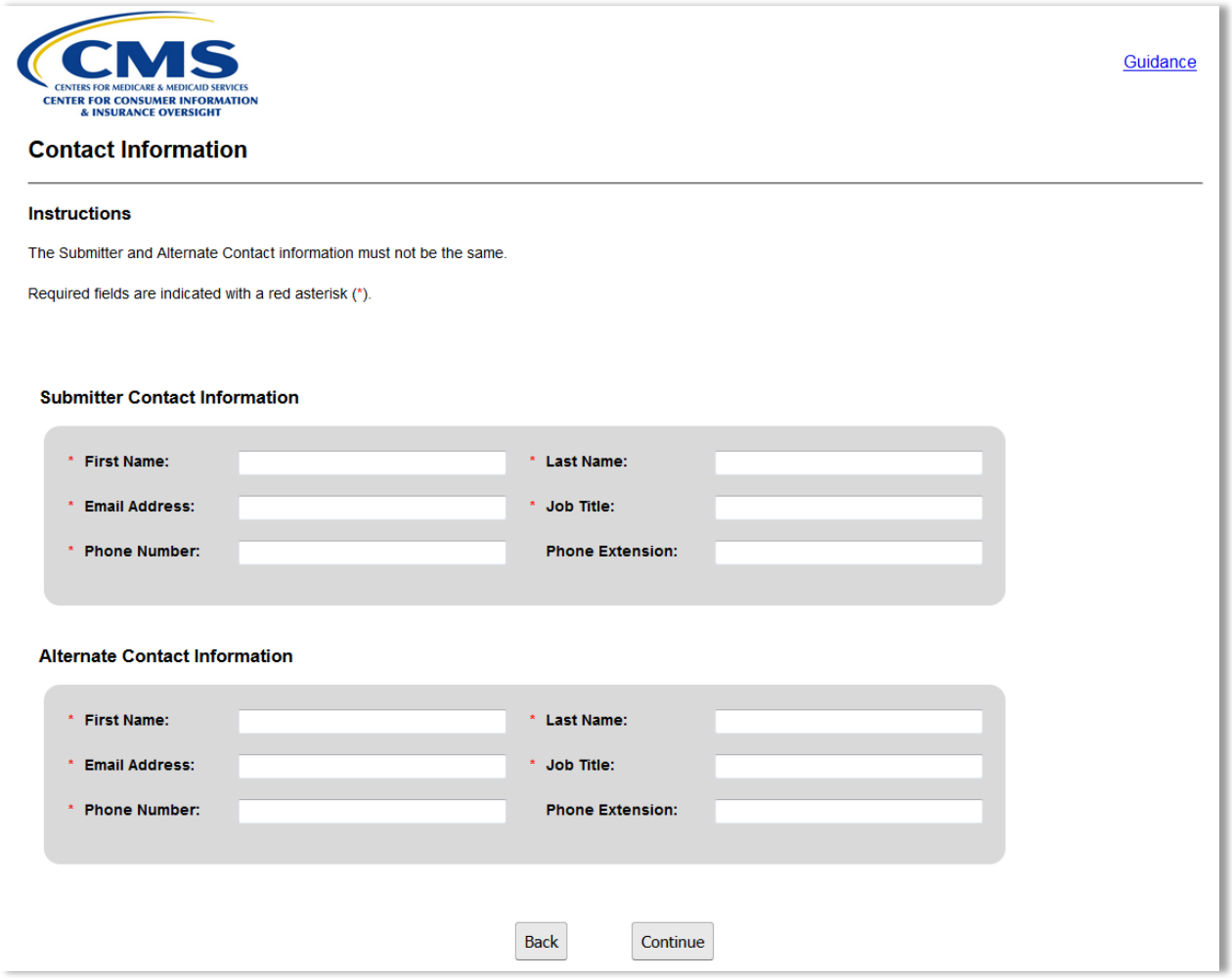


Do not include the following characters in the Contact Information page: ! * " ~ ^ [ ] < > { } ? $; \

Table 1: Contact Information Page (Steps 1-3)

Step	Action
1	Enter the Submitter Contact information: • First Name • Last Name • Email Address • Job Title • Phone Number • Phone Extension (optional)
2	Enter the Alternate Contact information (must be different from the Submitter Contact): • First Name • Last Name • Email Address • Job Title • Phone Number • Phone Extension (optional)
3	Select the **Continue** button. The web form proceeds to the HIOS ID and CSR Reconciliation Methodology page.

Figure 2: Contact Information Page



3 HIOS ID and CSR Reconciliation Methodology Page

To complete the HIOS ID and CSR Reconciliation Methodology page, enter a HIOS ID and select a CSR reconciliation methodology from the options provided for that HIOS ID for the 2016 benefit year. Issuers must apply the same methodology to all plan variations. Because the simplified methodology is intended as a transitional option, issuers who selected the standard methodology for a HIOS ID in 2015 are not allowed to switch to the simplified methodology for the 2016 benefit year.

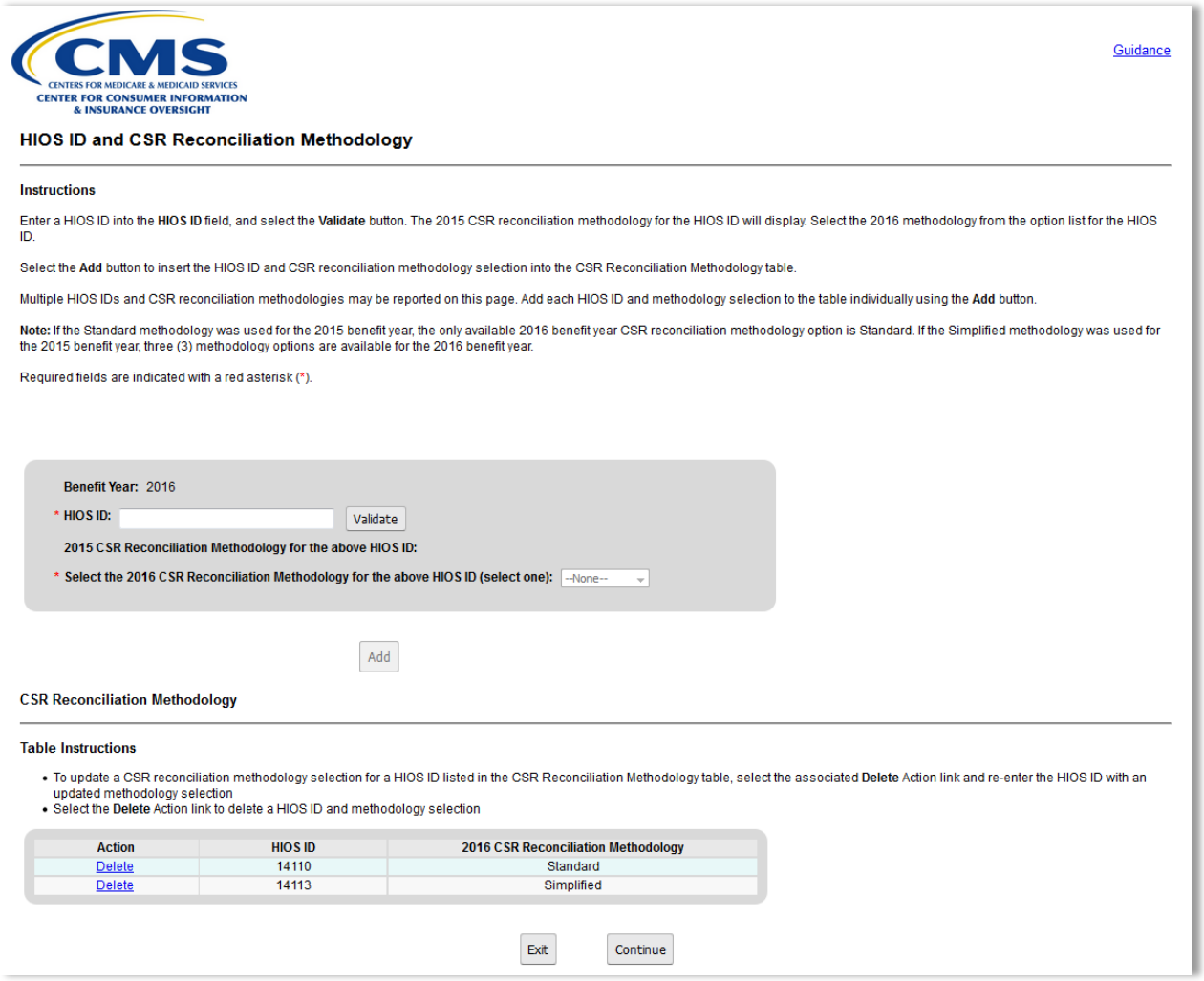
This page allows for the reporting of multiple HIOS IDs. Follow the steps in Table 2 below.

Table 2: HIOS ID and CSR Reconciliation Methodology page (Steps 1-6)

Step	Action
1	In the **HIOS ID** field, enter a 2016 HIOS ID for which a methodology selection is required, and select the **Validate** button.  After the HIOS ID is entered, the 2015 CSR reconciliation methodology will display in the **2015 CSR Reconciliation Methodology for the above HIOS ID** field, if applicable.
2	From the 2016 CSR Reconciliation Methodology for the above HIOS ID field, select an option from the list provided.  If standard methodology was selected for the HIOS ID in 2015, then standard methodology is the only available option.
3	Select the **Add** button to include the HIOS ID and methodology selection in the CSR Reconciliation Methodology table for the current web form session.
4	Repeat Steps 1-3 for each applicable HIOS ID.  Each HIOS ID entry and methodology selection made during the web form session will be included in the CSR Reconciliation Methodology table.

Step	Action
5	Review the CSR Reconciliation Methodology table for accuracy. To delete a HIOS ID and methodology selection from the table, select the **Delete** Action link next to a HIOS ID within the table.
6	Select the **Continue** button. The web form proceeds to the Summary page.

Figure 3: HIOS ID and CSR Reconciliation Methodology Page



4 Summary Page

Review the information in the Summary page, as displayed in **Error! Reference source not found.**. The option to add a technical point of contact is included in this page of the web form.

Use the steps below to review the information included in the Summary page.

Table 3: Summary Page (Steps 1-4)

Step	Action
1	Review the CSR Reconciliation Methodology Summary table for accuracy. Select the **Delete** Action link next to a HIOS ID within the table to remove a HIOS ID and methodology selection.
2	To add a new technical contact, select the **Add Technical Point of Contact** button. Refer to Section 5.1 for instructions on the Add Technical Point of Contact page.  The Technical Point of Contact Summary table reflects only the technical contacts added during the current web form session. • After technical contacts are added, review the Technical Point of Contact Summary table for accuracy • To view, edit, or delete a technical contact listed in the table, select the **View**, **Edit**, or **Delete** Action link next to a technical contact name within the table
3	Review the Submitter and Alternate Contact Information for accuracy. To edit contact information, select the **Edit Contact Information** button.

Step	Action
4	Use the table below to proceed with the web form.

If	Then	And
You want to enter additional HIOS ID(s) and make a CSR reconciliation methodology selection,	Select the **Continue** button	The web form proceeds to the HIOS ID and CSR Reconciliation Methodology page. Refer to Section 3.
You have finished reporting the reconciliation methodologies for your company's HIOS IDs,	Select the **Submit** button	The web form proceeds to the Confirmation page. Refer to Section 6.



Selecting the **Exit** button displays a popup, which notes that all session data will be lost. Select **Cancel** to return to the Summary page if you do not intend to exit.

Figure 4: Summary Page (continued)



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Guidance

Summary

Instructions

To update/edit an entry in the CSR Reconciliation Methodology Summary table, select the associated **Delete** Action link for the row, and select the **Continue** button located at the bottom of the Summary page to update the HIOS ID and CSR reconciliation methodology or to enter an additional HIOS ID.

Benefit Year: 2016

CSR Reconciliation Methodology Summary

Action	HIOS ID	2016 CSR Reconciliation Methodology
Delete	14110	Standard
Delete	14113	Simplified

Technical Point of Contact Summary

Instructions

Select the **Add Technical Point of Contact** button to add a new technical point of contact. You may include up to two (2) technical points of contact per HIOS ID.

Select the **View, Edit, or Delete** Action link from the Action column of the Technical Point of Contact Summary table to review, update/edit, or remove a technical point of contact and the HIOS ID association.

NOTE: To add a new technical contact for a HIOS ID that is currently associated with two technical contacts in the Technical Point of Contact Summary table, edit one (1) of the current technical contacts to remove the HIOS ID association, and add the new technical contact and associate it with the HIOS ID.

No Technical Points of Contact have been added

Action	First Name	Last Name	Email Address	Associated HIOS ID(s)

Add Technical Point of Contact

Contact Information

Instructions

Select the **Edit Contact Information** button to update/edit contact information.

Submitter Contact Information

* First Name:	Submitter	* Last Name:	Contact
* Email Address:	submittercontact@state.gov	* Job Title:	Submitter Contact
* Phone Number:	(000) 000-0000	Phone Extension:	

Alternate Contact Information

* First Name:	Alternate	* Last Name:	Contact
* Email Address:	alternatecontact@state.gov	* Job Title:	Alternate Contact
* Phone Number:	(000) 000-0000	Phone Extension:	

Edit Contact Information

To enter additional HIOS ID(s) and report CSR reconciliation methodology, select the **Continue** button.

Select the **Submit** button to complete the CSR reconciliation methodology reporting process.

Exit Continue Submit

5 Technical Point of Contact

The CSR reconciliation methodology technical point of contact will be contacted if CMS needs to perform CSR reconciliation-related outreach. Each technical contact entered during a web form session must be associated with at least (1) HIOS ID, and each HIOS ID may have up to two (2) technical points of contact.

5.1 Add Technical Point of Contact Page

When the **Add Technical Point of Contact** button is selected from the Summary page, the web form proceeds to the Add Technical Point of Contact page (as displayed in Figure 5). This page includes a table listing the HIOS ID(s) and reconciliation methodologies entered during the web form session. Use the steps in Table 4 to add a new technical contact.



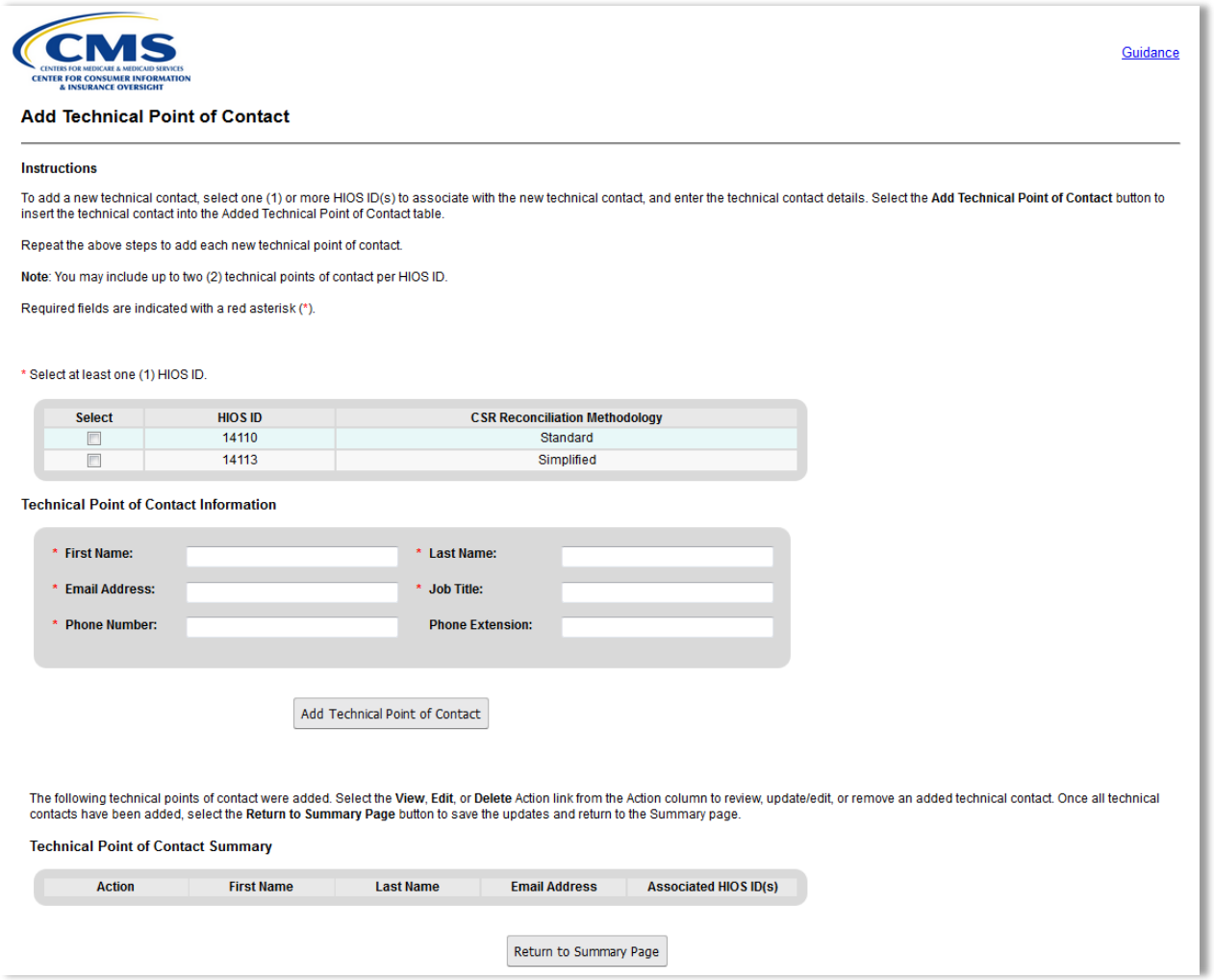
The Technical Point of Contact Summary table reflects only the technical contacts added during the current web form session.

Table 4: Add Technical Point of Contact (Steps 1-7)

Step	Action
1	In the Select column, select the **checkbox** next to each HIOS ID that will be associated with the new technical contact. Select all that apply.  Each HIOS ID may have up to two (2) technical points of contact and a minimum of one (1) technical point of contact.
2	Enter the **Technical Point of Contact Information**: • First Name • Last Name • Email Address • Job Title • Phone Number • Phone Extension (optional)

Step	Action
3	Select the **Add Technical Point of Contact** button. The new technical contact is included in the Technical Point of Contact Summary table.
4	Repeat Steps 1-3 to enter another technical contact.  Because a HIOS ID cannot have more than two (2) associated technical contacts, a HIOS ID will be removed from the HIOS ID list included in this page after it has been associated with two (2) technical contacts during a web form session.
5	Review the Technical Point of Contact Summary table for accuracy. To view, edit, or delete the Technical Point of Contact Summary table information, select the **View**, **Edit**, or **Delete** Action link next to a technical contact name within the table.
6	Select the **Return to Summary Page** button.
7	Return to Section 4 to proceed with the web form.

Figure 5: Add Technical Point of Contact Page



5.3 Edit a Technical Point of Contact

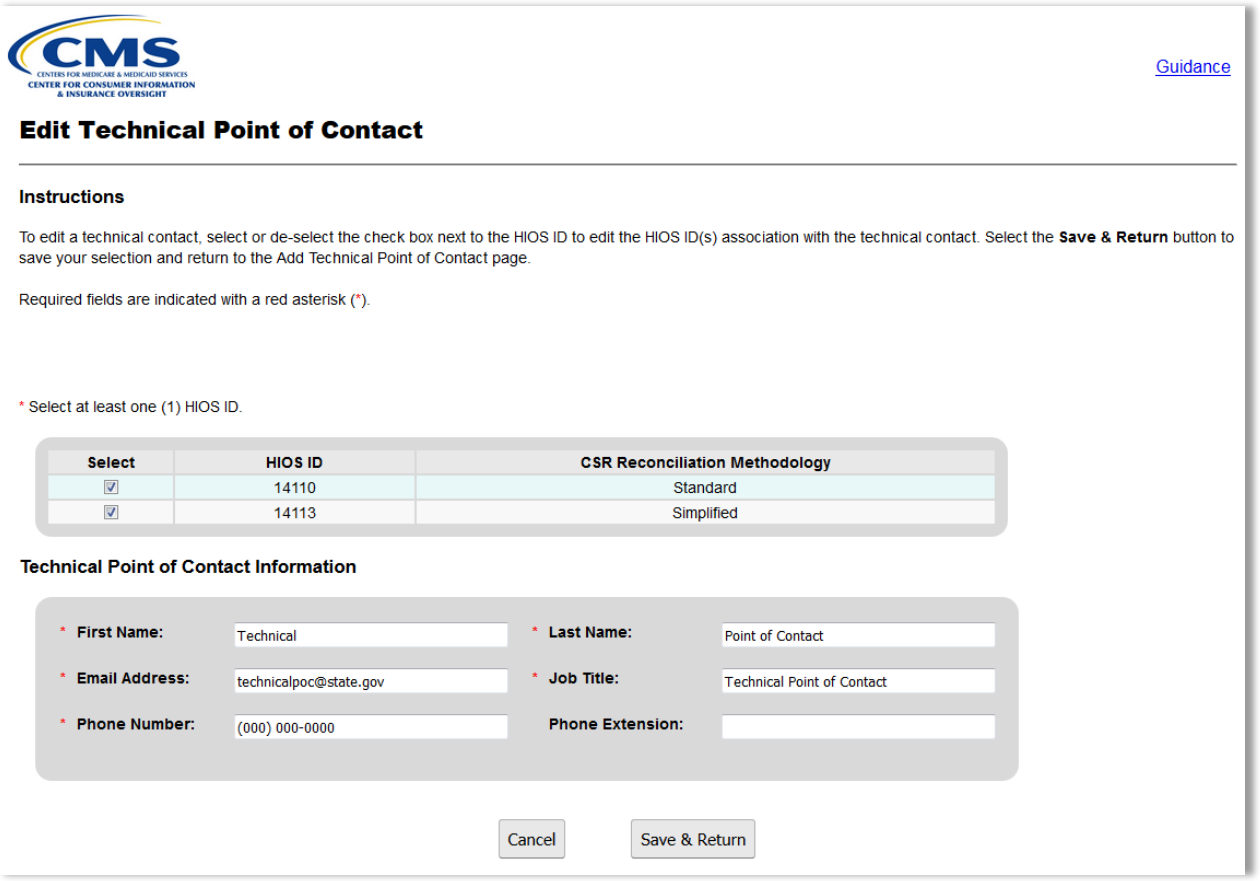
To add a new technical contact for a HIOS ID that is currently associated with two technical contacts in the Technical Point of Contact Summary table, edit one (1) of the current technical contacts to remove the HIOS ID association (the Edit Technical Point of Contact page is displayed in Figure 6). Use the steps in Table 5 below to edit HIOS ID association with a technical contact and associate that HIOS ID with a new technical contact.

Table 5: Edit HIOS ID Association and Associate with a New Technical Contact (Steps 1-13)

Step	Action
1	Navigate to the Summary page, and locate the Technical Point of Contact Summary table.
2	Review the technical contacts and HIOS ID associations in the table, and identify the HIOS ID you want to change and the two (2) technical contacts with which it is associated.
3	Determine which technical contact no longer requires association with the HIOS ID, and select the **Edit** Action link next to that technical contact's name within the table.
4	From the Edit Technical Point of Contact page, de-select the **checkbox** next to the HIOS ID to remove the association.
5	Review the information in the Edit Technical Point of Contact page for accuracy. Update the information, if necessary.
6	Select the **Save & Return** button.
7	Navigate to the Technical Point of Contact Summary table, and confirm that the edited technical contact is no longer associated with the HIOS ID.
8	Select the **Add Technical Point of Contact** button.
9	In the Select column, select the **checkbox** next to each HIOS ID that will be associated with the new technical contact.
10	Enter the **Technical Point of Contact Information**: • First Name • Last Name • Email Address • Job Title • Phone Number • Phone Extension (optional)

11	Select the **Add Technical Point of Contact** button. The new technical contact will be included in the Technical Point of Contact Summary table.
12	Select the **Return to Summary Page** button.
13	Return to Section 4 to proceed with the web form.

Figure 6: Edit Technical Point of Contact Page



6 Confirmation Page

The web form proceeds to the Confirmation page after the **Submit** button is selected in the Summary page. The Confirmation page details who is informed of the web form submission and how to print the Confirmation PDF of the web form submission.

An acknowledgement email will be sent to the email addresses listed in the Confirmation page, as displayed in Figure 7. Please save and print the PDF of the Confirmation for your records. The PDF is the formal confirmation of the web form submission.

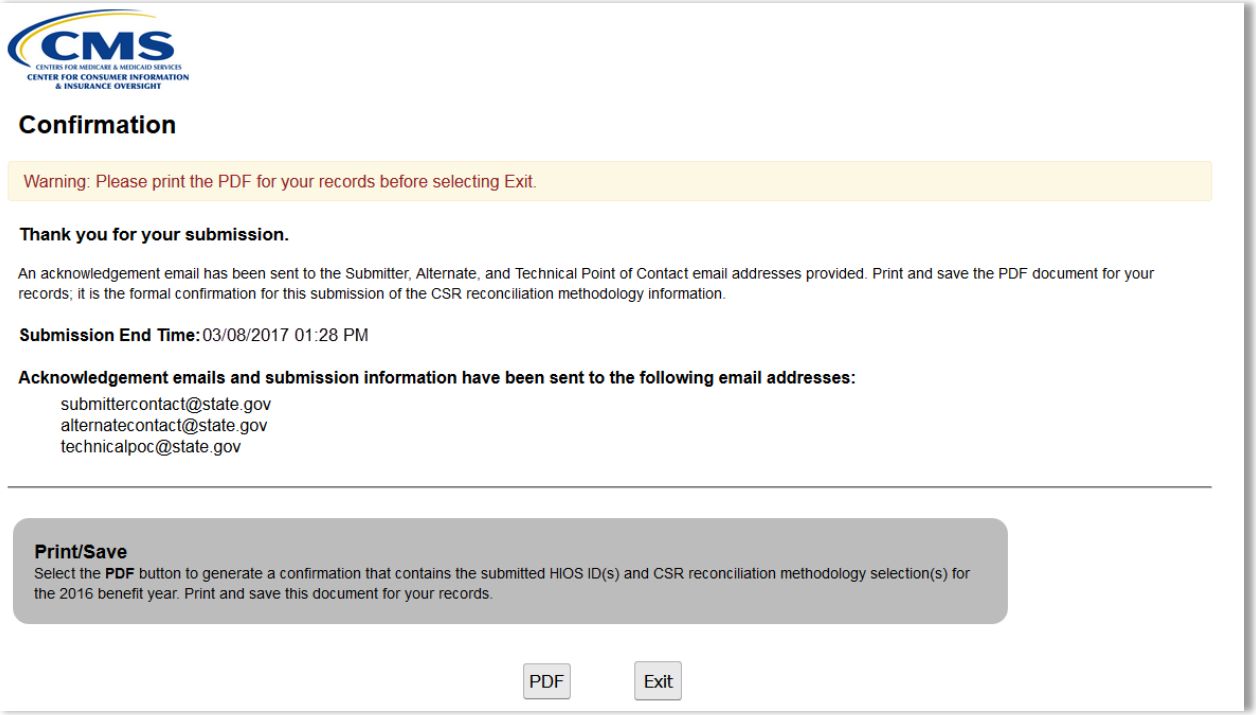


The PDF will not be attached to the acknowledgement emails.

Table 6: Confirmation Page (Steps 1-2)

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

Figure 7: Confirmation Page



7 Web Form Resubmission

Although the CSR Reconciliation Methodology web form must be completed in a single session, issuers may resubmit HIOS IDs and CSR reconciliation methodology selections. To resubmit a HIOS ID and methodology selection, navigate to the web form link provided in the REGTAP announcement, and complete the web form using the instructions in the previous sections of this guide.

In the HIOS ID and CSR Reconciliation Methodology page (refer to Section 3), you may enter and validate HIOS IDs that were entered during a previous web form session. The CSR reconciliation methodology selections made for the resubmitted HIOS IDs will overwrite selections that were made during previous web form sessions.

Technical point of contact information entered and associated with a HIOS ID during a web form resubmission will also overwrite previously entered technical contact information with the same HIOS ID association.