

SERFF Updates for Plan Year 2019

April 12, 2018

**Qualified Health Plan (QHP)
Issuer Conference**

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[HTTPS://WWW.REGTAP.INFO](https://www.regtap.info)

SERFF Plan Management

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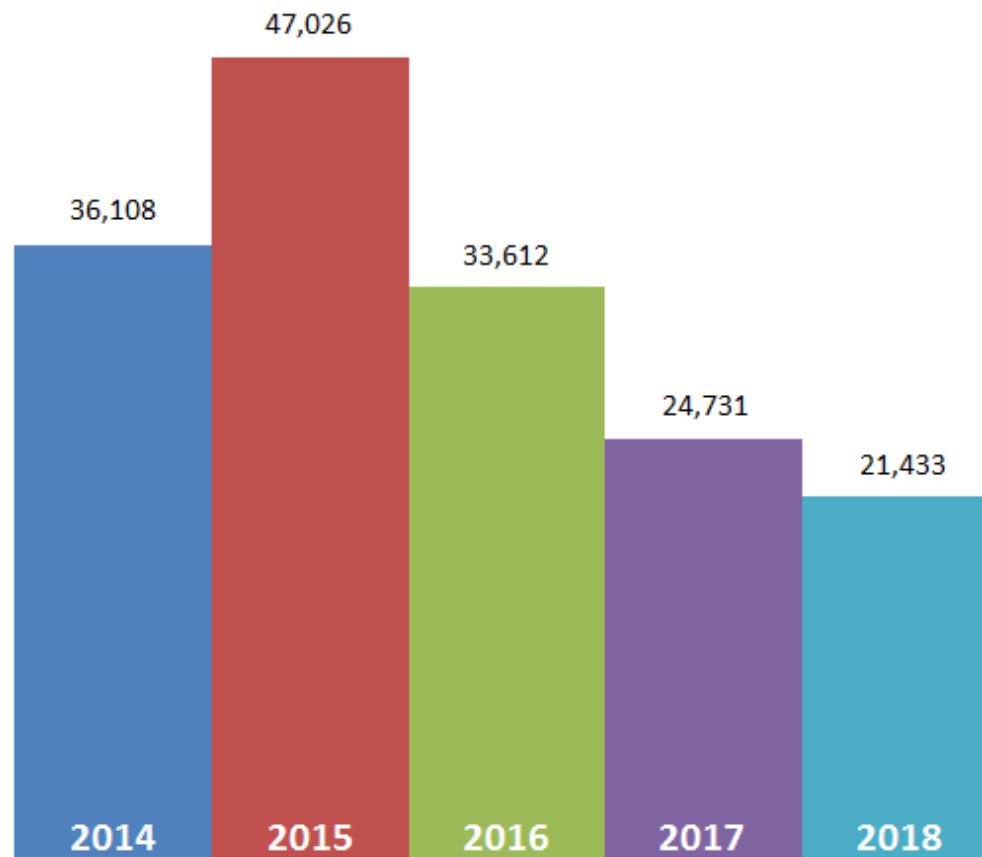
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Session Agenda

- SERFF Plan Management Overview
- Project Timeline
- Plan Year 2019 Updates
- Communication and Preparation
- Tips for success
- Q&A

Yearly Plan Submissions



Plan Management SERFF Stats

- Participating states have been largely constant
- 90% of plans/binders are medical
- 70% are small group
- 66% are off exchange plans
- 672 distinct issuers have filed
- New York, Minnesota and Michigan have highest volume

SERFF Timeline

- Development & testing currently in progress.
 - Integration testing between NAIC/SERFF and CMS also underway.
- Outreach to states and companies has started.
 - Issuer Alert: Wait!
 - State communication on configuration
- SERFF release planned for April 26 to support template validation and binder submission.
 - Additional releases for transfer and reporting may be needed.

Plan Year 2019 Changes

The following templates are no longer required unless requested by the state.

- NCQA Template
- URAC Template

Plan Year 2019 Changes

States will be able to transfer a plan without the Rate Data template.

- Optional for states to use this feature.
- May impact state deadlines.

Transfer Plans to Exchange

Plans transferred to the Health Exchange are not processed immediately. Once the Exchange notifies SERFF of the results, the plan statuses will be updated.

On / Off Exchange:

Select an Option

Rate Data Template: ☐ Include ☒ Do Not Include

| <input type="checkbox"/> Standard Component ID | Plan Availability | Plan Disposition Status | Certification Status |
|--|-------------------|-------------------------|----------------------|
| <input type="checkbox"/> 72093CO0030001 | Off Exchange | Approved | Not Determined |
| <input type="checkbox"/> 72093CO0030002 | Off Exchange | Approved | Not Determined |
| <input type="checkbox"/> 72093CO0040001 | Off Exchange | Approved | Not Determined |
| <input type="checkbox"/> 72093CO0040002 | Off Exchange | Approved | Not Determined |

Transfer

Cancel

Plan Year 2019 Changes

- SERFF will be updated to accommodate any federal template changes, if needed.
- Correcting some defects.
- A few minor enhancements may be introduced.

PY2019 in SERFF – Issuer Tips for Success

Tips for Industry:

- Watch the Alerts tab.
- Read the State's Plan Management General Instructions.
- Note State deadlines in addition to federal timeline.
- Avoid waiting until the last minute.
 - Prepare your Templates
 - Associate Schedule Items
 - Cannot be associated until submitted
 - Cannot associate across states

PY2019 in SERFF – Issuer Tips for Success

Tips for Industry Continued:

- Network Adequacy
 - Include all files, outputs only.
- Use the DIT and other tools.
- Verify your HIOS, NCQA, URAC IDs are entered for each state prior to filing.

PY2018 in SERFF – States Tips for Success

Recommendations for Regulators:

- Watch for correspondence & work with the SERFF team to communicate your submission requirements as early as feasible.
- Update your Plan Management General Instructions in SERFF.
- Review your State Users and update roles/add users as needed.
- Review your state statuses.

PY2019 in SERFF – States Tips for Success

Recommendations for Regulators Continued:

- Prepare your state supporting documents and be sure to send the attachment(s) to your Product Specialist.
- Prepare your state deadlines in accordance with the Federal timeline.
- Utilize State Generated Messages to communicate with issuers.

SERFF PY2019 Training

- No new or live training is anticipated for the coming cycle.
- Recorded training sessions for both industry and regulators are posted on www.serff.com under the Plan Management link.

Plan Management Info Page



System for Electronic
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PLAN MANAGEMENT

As stated in the Affordable Care Act (ACA) Section 1321(c)(1)(B), beginning January 1, 2014, states must provide consumers who do not have employer-provided insurance the ability to purchase insurance through an Affordable Insurance Exchange.

For more information regarding the health care law, please go to www.healthcare.gov.

Please check back frequently for updates regarding SERFF's role in the Plan Management component of Affordable Insurance Exchanges.

ON-DEMAND TUTORIALS

Partnering with the SERFF Team, NAIC Education and Training has recorded Plan Management training for our Industry and State users. This training is geared toward new users, but individuals who have used SERFF Plan Management in past years may attend as a refresher if desired, as it is very similar to what was offered in prior years.

The trainings are presented by knowledgeable NAIC staff with over 11 years of experience in training SERFF to all users.

To watch the recorded presentation, please click on the following link, as appropriate:

Industry Training: <http://naic.adobeconnect.com/p3zyeoyq96a/>

State Training: <http://naic.adobeconnect.com/p5c5w88mdug/>

DOCUMENTATION

Plan Year 2018

This page will be updated as new information is available related to Plan Year 2018 and filing in SERFF. Pay particular attention to the last column of the State Plan Management Systems Matrix where you can see which states SERFF has configured and ready for Year 2018 plans. It will be updated frequently.

**State Plan Management Systems Matrix
for Plan Year 2018 (PDF)**
Updated 5/17/2017

**Plan Year 2018 Federal Plan Management Data
Templates and helpful corresponding information**

SERFF Contacts

Plan Management Website

[http://www.serff.com/serff health insurance plan management.htm](http://www.serff.com/serff_health_insurance_plan_management.htm)

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Questions

