

Enhanced Direct Enrollment (EDE) Test Case Suite User Guide

Overview

The EDE Test Case Suite provides test case inputs and attestations representative of households seeking healthcare coverage and/or financial assistance to Direct Enrollment (DE) Entities and their auditors so that DE entities can test their EDE application to ensure proper

- User Interface (UI) functionality,
- Application Programming Interface (API) connection,
- Eligibility Determination Notice (EDN) generation, and
- Eligibility results.

CMS recommends entities utilize the EDE Test Case Suite to test their application prior to providing their test environment credentials to the Centers for Medicare & Medicaid Services (CMS) to conduct EDE UI Eligibility Technical Assistance (TA) and to the compliance team conducting mini-audit testing as part of the business audit review.

The EDE Test Case Suite includes:

- Test case inputs,
- Expected UI question display information, and
- Expected Eligibility Results for household scenarios supported by all phases of EDE development.
 - o DE Entities may choose from three phases of EDE implementation, which are further outlined in [Appendix A](#). DE entities and their auditors may use the filtering function within the EDE Test Case Suite to ensure that they run only the tests supported by their application. Additional Information about the differences between Phases 1-3 is outlined in [Appendix B](#).

This information is provided so that DE Entities can compare the expected information against their UI to ensure proper question flow, conditional display logic, and integration with the Standalone Eligibility Services (SES). Specifically, testers should enter the provided test case inputs into their UI and compare the UI question display in their application to Column J, “Expected User Interface Question Display” and their final eligibility results to Column L, “Expected Eligibility Results.”

The test case inputs are depicted in the order that HealthCare.gov displays the application sections and this order shows one potential implementation model to EDE partners. For further requirements and flexibility regarding specific questions and section flows within the application, CMS recommends that partners refer to the UI Question Companion Guide (UI Q CG) and the API Functional Integration Toolkit, located in the [Business Report and Template Toolkit](#). The Application Services Companion Guide, SES

Integration Manual (FFE UI Application Services for Eligibility: General and Technical FAQs), and API Specs available on [ZONE](#) include additional information about SES indicators and should be used as references for integration with CMS systems.

How to Use

EDE Test Case Suite Categories: Blue header rows distinguish different categories of test cases to assist EDE partners in locating test cases to test different sections of their UI. It is important to note that some test cases are specific to a certain phase of implementation, while others can be tested in any phase application. The EDE Test Case Suite includes the following categories:

- General UI Functionality: Test cases covering basic application messaging, field level validations, and backwards navigation
- Household Contact/Application Information: Test cases covering how household contact information is collected
- Household Composition: Test cases covering the setup of who is applying for coverage, how application members are related to each other, and how application members file taxes
- Head of Household (Phase 3 only): Test cases covering applicants with “head of household” tax filing status
- Social Security Number (SSN): Test cases covering collection of SSNs for applicants, non-applicants, and inconsistent name on SSN card
- Pregnant Application Members (Phases 2 and 3): Test cases covering pregnant applicants and how expected babies are counted in the household
- Incarcerated Application Members (Phases 2 and 3): Test cases covering currently incarcerated household members both pending and not pending disposition of charges
- American Indian/Alaska Native (AI/AN) (Phase 3 only): Test cases covering members of federally recognized tribe and cost-sharing reduction (CSR) eligibility
- Parent/Caretaker Relatives (Phase 3 only): Test cases covering application members responsible for children under 18 and deprivation requirements
- Medicaid/CHIP Denial: Test cases covering Medicaid denials due to immigration status, change in eligibility, and granting special enrollment periods (SEPs) when denied
- Former Foster Care (Phases 2 & 3): Test cases covering household members formerly in foster care, both in and out of the application state
- Full-Time Students (Phases 2 & 3): Test cases covering household members with full-time student status, both with and without student residency
- Citizenship/Immigration (Phases 2 & 3): Test cases covering household members that are U.S. citizens, naturalized or derived citizens, or those that are not U.S. citizens (whether they attest to eligible immigration status or not)
- Income: Test cases covering different types of income and deductions, how income is calculated by SES, and variable income

- Other Coverage: Test cases covering household members currently enrolled in coverage, including employer-sponsored coverage (ESC)
- SEPs: Test cases covering different life changes such as moving, getting married, and having a child that can result in an SEP
- Medicaid/CHIP: Test cases covering different ways applicants can be determined Medicaid or CHIP eligible, including categorical eligibility
- Advanced Payments of the Premium Tax Credit (APTC)/CSR: Test cases covering different ways applicants can be APTC/CSR eligible including mixed eligibility results
- Data Matching Issues (DMIs): Test cases covering different DMIs a household member can receive to notify them of the need to provide documents to confirm an aspect of their eligibility and ensure proper results messaging
- Citizenship/Immigration with Verified Test Data: Test cases covering household members with different citizenship and immigration attestations using verified test data to trigger certain questions and results
- Income Discrepancies with Verified Test Data: Test cases covering household members with income discrepancies using verified test data to trigger certain questions and results

Test Case Suite Columns:

Initial Test Cases: The EDE Test Case Suite “Initial Test Cases” tab is organized into the columns shown below to assist EDE partners in filtering and overall use of the EDE Test Case Suite. For a sample test case’s layout, please see [Appendix A](#).

Column	Name	Description/Purpose
A	Test Case ID	Indicates test case number for ease of reference
B	Tester	For DE Entities’ or other testers’ ease of recording their internal testing runs and the achieved outcomes for each test case
C	Date & Time of Initial Test	
D	Needs to be retested?	
E	Date & Time of Retest	
F	Test Case Phase	Indicates which EDE phase the test case applies to. EDE partners may filter on Column F to view only test cases applicable to their phase. For a description of the differences among Phase 1-3, please see Appendix B
G	Testing Item	Describes the specific functionality targeted by the test case
H	State	Indicates which states the test case can be tested in. EDE partners may filter on Column H to view only test cases applicable to their state(s)
I	Test Case Inputs	Specifies the key UI inputs needed to complete the test case, such as: - the number of members in the household - whether the application seeks financial assistance - whether each household member is an applicant - relationship to the application filer and other household members - where, and if, non-applicants should be added to the application later (i.e. marital status, living situations, or parent/caretaker relative sections, etc.) - applicant- and phase-specific information and attestations, including - o marital status - o tax filing status - o living situation

Column	Name	Description/Purpose
		○ citizenship/immigration status, including whether to provide an SSN. If no SSN is provided using test data, but an SSN is required, please see the “SSNs for Test Cases” tab of the EDE Test Case Suite ○ Parent/Caretaker Relative status ○ income ○ pregnancy status ○ AI/AN status ○ former foster care status ○ incarceration status ○ non-MAGI status ○ Medicaid denial attestations ○ Medicaid/CHIP program questions ○ Additional Questions attestations (i.e. CHIP or Medicaid program questions that display after the preliminary eligibility determination) ○ current coverage, and ○ recent life changes
J	UI Question Display	Specifies: - questions that should display for particular applicants, if that information is not included in Column I, “Test Case Inputs” - questions that should display for particular application phases - the flexibilities offered to partners in collecting applicant and household member information
K	UI Question Display Verification	For DE Entities’ or other testers’ ease of recording their internal testing results and the achieved outcomes for each test case
L	Expected Eligibility Results	Specifies the type of insurance program and/or financial assistance that each applicant is eligible for based on the provided test case inputs including:



Column	Name	Description/Purpose
		- Qualified health plans (QHPs) - Medicaid/CHIP, including the display messaging for assessment (“May be eligible”) or determination (“Eligible”) states - o Please refer to the State Based Configuration Table, columns BV and BW to see assessment vs determination states - Medicaid determination requests, - SEP eligibility, - APTC/CSR eligibility, DMI/SVI, if applicable - Ineligible for all programs, if applicable
M	Actual Eligibility Results	For DE Entities’ or other testers’ ease of recording their internal testing results and the achieved outcomes for each test case
N	Notes/Comments	For DE Entities’ or other testers’ ease of recording their internal testing results and the achieved outcomes for each test case

For additional information regarding the application sections and UI question display of the EDE Test Case Suite, partners should reference the [UI Q CG](#). If partners are in the process of building their application, and have questions on flexibility or requirements, CMS recommends submitting a UI Flexibility Consult. More information about a UI Flexibility Consult and how to request this support can be found [here](#).

For questions related to this documentation or EDE application UI requirements, email the DE Help Desk at DirectEnrollment@cms.hhs.gov.

SSNs for Test Cases: The EDE Test Case Suite “Initial Test Cases” tab is organized into the columns shown below to assist EDE partners in finding test data to enter where SSNs are needed to complete at application but where no verified test data is provided in the test case inputs.

CLOSE HOLD – DO NOT SHARE

INFORMATION NOT RELEASABLE TO THE PUBLIC UNLESS AUTHORIZED BY LAW: This information has not been publicly disclosed and may be privileged and confidential. It is for internal government use only and must not be disseminated, distributed, or copied to persons not authorized to receive the information. Unauthorized disclosure may result in prosecution to the full extent of the law.



Appendix A: Sample Test Case

A	B	C	D	E	F	G	H	I	J	K	L	M	N
Test Case ID	Tester	Date and Time of Initial Test	Needs to be retested?	Date and Time of Retest	Test Case Phase	Testing Item	State	Test case Inputs (HH, DOB, Income, etc.)	UI Question Display (if applicable)	UI Question Display Verification (verified, not verified)	Expected Eligibility Results	Actual Eligibility Results	Notes/ Comments
7					Phase 1, Phase 2, Phase 3	CiC update to non-FA	Any	1 person household Financial assistance application P1: (application filer): seeking coverage, any DOB, any income, submit application Return to application via a CiC to update the application to non-FA Go through the application to the application review page	For phases 1 and 2 only: Verify the consumer must complete the screening questions prior to returning to the application For all phases: Verify no FA questions are asked upon CiC when changing to non-FA and none of the previous FA question attestations (like income) appear on the application review page		Verify the test case inputs can be entered without issues and exit the application without submitting it		

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Appendix B: EDE Phases

DE Entities have the option to choose from three phases of EDE implementation. Because Phase 1 and Phase 2 applications cannot support all consumer scenarios, DE Entities must implement screening questions to redirect consumers to HealthCare.gov to complete their applications. The scenarios supported by each application phase, based on attestations provided to screening questions in Phases 1 and 2, are listed below.

- **Phase 1: *Simplified Application*** — the DE Entity hosts an application but chooses to support a subset of scenarios meeting all of the following conditions:
 - If the consumer is married, the household must file a joint tax return for the coverage year, and the household contact and their spouse cannot be claimed as dependents on another person's tax return
 - If the consumer is single, the household contact must file a federal tax return for the coverage year
 - Only the following dependents can be added to Phase 1 applications:
 - Dependents who live with the parent(s) who claims them on the tax return
 - Dependents who are: under 25, not married, and sons/daughters of the household contact (i.e., not stepchildren or grandchildren)
 - The following household-specific consumer circumstances will be supported:
 - Household members who all live at the same address in the state for which they are applying for coverage (if the consumer is single and doesn't claim dependents, they must provide a home address in the state in which they are applying for coverage)
 - All children 18 or younger who live with the application filer (and their spouse if married) who will be claimed on their tax return for the coverage year (including children who are not sons/daughters)
 - Household members who aren't full-time students age 18-22
 - Household members who aren't pregnant
 - The following applicant-specific consumer circumstances are supported:
 - All applicants are U.S. Citizens or U.S. Nationals (they must be born in the U.S. and not naturalized or derived citizens)
 - All applicants will provide Social Security numbers (SSNs) and apply for coverage using the same name as the one on their SSN card
 - Applicants aren't incarcerated (detained or jailed)
 - Applicants aren't AI/AN
 - Applicants don't have access to employer coverage (COBRA, etc.)
 - Applicants weren't in foster care at 18 and are currently 25 and younger
- **Phase 2: *Expanded Simplified Application*** — the DE Entity hosts an application including all Phase 1 scenarios as well as an additional set of scenarios as follows but does not support all application scenarios. Phase 2 applications support:
 - Household members who are full-time students age 18-22

- o Household members who are pregnant
- o Applicants who are not U.S. Citizens
- o Applicants who are naturalized U.S. Citizens
- o Applicants who do not provide an SSN
- o Household members with a different name than the one on their SSN card
- o Incarcerated applicants
- o Applicants who were previously in foster care
- o Dependents who are stepchildren of the household contact

Phase 3: *Complete Application* — the DE Entity hosts an application which supports all scenarios equivalent to HealthCare.gov’s classic application. Phase 3 applications’ flows include questions regarding information that is established in the screener questions for Phases 1 and 2.