



PM Community User Guide for States

Last updated April 2020

Qualified Health Plan



Health Insurance Marketplace

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New PM Community User's Checklist

CMS recommends that PM Community users take the following actions once they receive access to the PM Community via the CMS Enterprise Portal:

- ✓ Read through this user guide and click through the tabs in the PM Community to familiarize yourself with the layout and functionality.
- ✓ Watch the PM Community Video Series, found in the "QHP Certification Resources" tab within the "Home" tab, for detailed instructions on navigating the PM Community.
- ✓ Confirm that your state has at least two active PM Community users; new users should follow the established steps to request access.
- ✓ Identify all of the contacts in your state that should receive emails from CMS related to QHP certification. Add or update your contacts as needed.
- ✓ Watch your email for notifications about new updates, QHP Application corrections, or plan confirmation activities.

Overview

The Plan Management (PM) Community is an online platform for issuers to receive information about their Qualified Health Plan (QHP) Application(s) and certification(s), and for states to receive information about the QHP Applications and certifications of plans offered by issuers in their state. As of plan year (PY) 2019, all states on the federal platform use the PM Community to view QHP Application data for issuers in their state, manage their contact list for QHP certification communications, and complete plan confirmation and documents pertaining to their state plan confirmation. Please note that new PM Community users can refer to [New PM Community User's Checklist](#) for an overview of first steps they should take upon receiving PM Community access. Refer to the appropriate section of this user guide for further guidance in completing those steps.

In addition, all states, including State-based Exchanges (SBEs), will use the PM Community to perform activities related to essential health benefits (EHB) benchmark selection.

The PM Community is organized into eight different tabs: Home, Organizations, States, Issuers in State, Withdrawal Forms, Cases, Plan ID Crosswalk Submission, Submit EHB Templates, and EHB Substitution.

This user guide does not provide detailed instructions on completing activities for EHB-benchmark selection in the PM Community. For more information on how to perform EHB benchmark selection, please refer to the [State Instructions for EHB-Benchmark Plan Templates Completion and Submission for Plan Year 2021](#).

Tab Name	Tab Contents	State Activities	User Guide Section
Home	• Certification-related updates • QHP certification timeline • Resources for using the PM Community • Review areas by exchange type • EHB overview • Cases • EHB templates and instructions	• Access the timeline and PM Community training resources • View certification-related updates from CMS • View information about review results release • View information about state EHB-benchmark plan updates and how to submit questions related to EHB	• General Information from CMS in the "Home" Tab (pg. 5)
Organizations	• State name • Contacts for QHP certification email distribution list	• View and manage contacts	• Manage Contacts in the "Organizations" Tab (pg. 7)
States	• State name and information • List of issuers in the state • Files shared by or with the state	• Upload plan confirmation documents	• View State Information and Submit Files in the "States" Tab (pg. 11)

Tab Name	Tab Contents	State Activities	User Guide Section
Issuers in State	- All issuer IDs associated with the state - All plan IDs associated with each issuer - Key certification documents shared with each issuer by CMS - All corrections associated with each issuer, including the expected CMS communication for each correction	- Check the submission and certification status of issuers and plans - Review corrections for issuers in the state	View Plans and Issuers in the "Issuers in State" Tab (<i>pg. 14</i>)
Withdrawal Forms	All withdrawal forms submitted through the PM Community by the state or issuers in that state	- Submit withdrawal forms - View all plan withdrawals submitted by the state or issuers in that state	Submit Withdrawal Forms from the "Withdrawal Forms" Tab (<i>pg. 17</i>)
Cases	States submit EHB questions to CMS using Cases	- Submit all related EHB questions using Cases - View all Cases under your username	Cases (How to Submit a Question) (<i>pg. 6</i>)
Plan ID Crosswalk Submission	All Plan ID Crosswalk Templates submitted by issuers in that state	View Plan ID Crosswalk Templates submitted by issuers in that state	View Plan ID Crosswalk Submissions in the "Plan ID Crosswalk Submission" Tab (<i>pg. 22</i>)
Submit EHB Templates	States submit required EHB templates and documents to CMS	- Submit EHB templates and documents - View EHB templates and documents submitted under your username	EHB Templates & Instructions (<i>pg. 7</i>) or reference State Instructions for EHB-Benchmark Plan Templates Completion and Submission for PY22
EHB Substitution	States inform CMS if they permit substitution between EHB categories and the applicable year	Indicate if your state allows EHB substitution between EHB categories and the applicable year	EHB Templates & Instructions (<i>pg. 7</i>) or reference State Instructions for EHB-Benchmark Plan Templates Completion and Submission for PY22

General Information from CMS in the “Home” Tab

The “Home” tab is the landing page after logging in. It contains seven tabs of its own: QHP Certification Updates, QHP Certification Timeline, QHP Certification Resources, EHB Overview, Cases (How to Submit a Question), EHB Templates & Instructions, and Review Areas by Exchange Type.

To return to the “Home” tab after navigating to another tab, click the house icon, outlined in red below.



QHP Certification Updates

The latest QHP certification updates for states are posted in this tab. This tab is an easy way to find the latest updates from CMS, and contains content that is similar to the information sent via email from CCIO Memos and the Plan Management & Oversight Group State Bulletin.

QHP Certification Timeline

This tab contains the QHP certification timeline presented in the *2021 Letter to Issuers in the Federally-facilitated Exchanges*.

QHP Certification Resources

This tab contains resources for using the PM Community, including the QHP Certification State Toolkit; videos on how to log in and use the PM Community; and links to the [Plan Management State Coordination \(PMSC\) mailbox](#) and [QHP certification website](#).

EHB Overview

This tab contains an overview of the EHB-benchmark selection activities that states can complete in the PM Community, as well as related resources.

Cases (How to Submit a Question)

All states, including states not making a benchmark or substitution changes, can submit EHB questions to CMS by creating a Case in the PM Community. This tab provides step-by-step instructions on how to submit an EHB question using the Cases function.

EHB Templates & Instructions

This tab provides a summary of the required documents for each benchmark plan option. States can download EHB templates and refer to the [State Instructions for EHB-Benchmark Plan Templates Completion and Submission for PY 2022](#).

Review Areas by Exchange Type

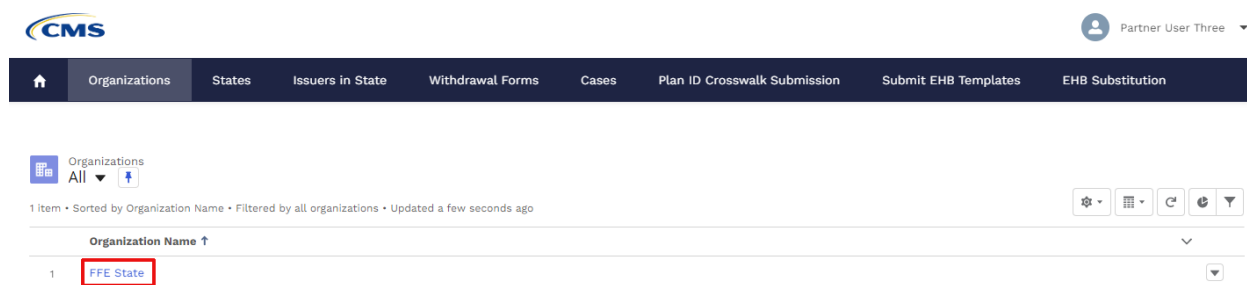
As CMS completes reviews of QHP Application data, issuers’ required corrections are released for issuers and states to review in the PM Community. This tab contains a table that details which review areas issuers in each state Exchange type can expect to see as new corrections are released.

Manage Contacts in the “Organizations” Tab

The “Organizations” tab displays the name of your state and is where you manage the contacts for your state. Contacts added to the PM Community will serve as the distribution list that CMS uses to send communications related to QHP certification, including email outreach and corrections related to QHP certification for issuers in your state.

View Your Organization

To view your state and its contacts, click on the “Organizations” tab. Your state will display in the list, as outlined in red below. Click on your state’s name to view Contacts.



The screenshot shows the CMS interface with the "Organizations" tab selected. The user is logged in as "Partner User Three". The navigation bar includes links for Home, Organizations, States, Issuers in State, Withdrawal Forms, Cases, Plan ID Crosswalk Submission, Submit EHB Templates, and EHB Substitution. The main content area shows a list of organizations. A dropdown menu is set to "All". Below the list, it says "1 Item • Sorted by Organization Name • Filtered by all organizations • Updated a few seconds ago". The table has a header "Organization Name ↑" and one row with "FFE State" highlighted in red.

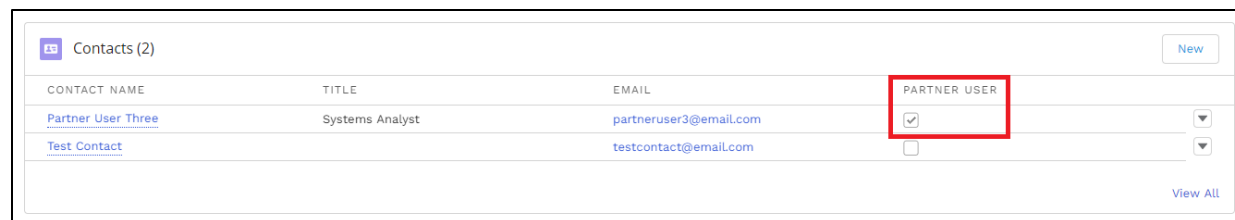
Manage Contacts

Within your contact list, there are two types of contacts:

- A **partner user**, also referred to as a PM Community user, is someone who has access to the PM Community for your state and receives QHP certification-related email communications from CMS. You will see the Partner User checkbox, outlined in red below, checked if that person is a partner user for your state. See [PM Community Users](#) for more information.
- A **contact** is a record of a member within your state who receives QHP certification-related email communications from CMS, but who does not have access to the PM Community. Contacts can be added, removed, or edited by any PM Community user for the state.

The partner users and contacts for an organization comprise the organization’s contact list. CMS uses the contact list as a distribution list for sending communications to your state, including plan confirmation associated with QHP certification for issuers in your state.

PM Community users are encouraged to keep this list up to date, so that all relevant members of their organization receive the appropriate communications. Please do not add any contacts to the list who should **not** receive these communications, or who do not wish to do so. Partner users are responsible for updating contact information when it changes, or as requested by the contact.

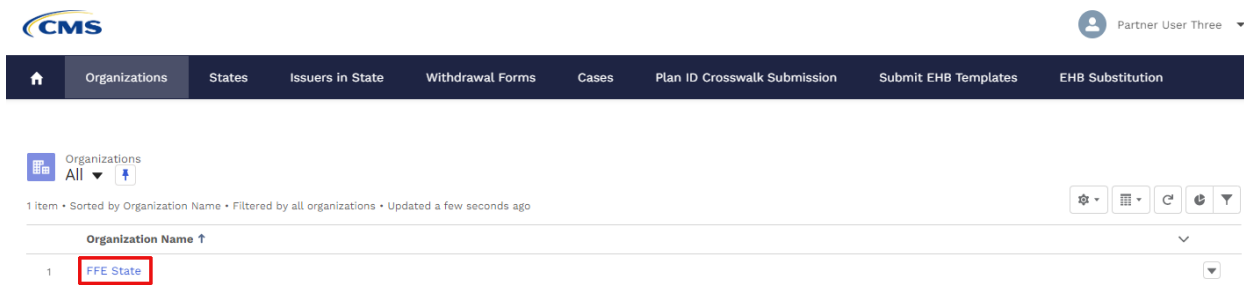


The screenshot shows the CMS interface with the "Contacts (2)" tab selected. The user is logged in as "Partner User Three". The main content area shows a table of contacts. The table has columns for CONTACT NAME, TITLE, EMAIL, and PARTNER USER. There are two rows: "Partner User Three" and "Test Contact". The "PARTNER USER" checkbox for "Partner User Three" is checked and highlighted in red.

CONTACT NAME	TITLE	EMAIL	PARTNER USER
Partner User Three	Systems Analyst	partneruser3@email.com	☒
Test Contact		testcontact@email.com	☐

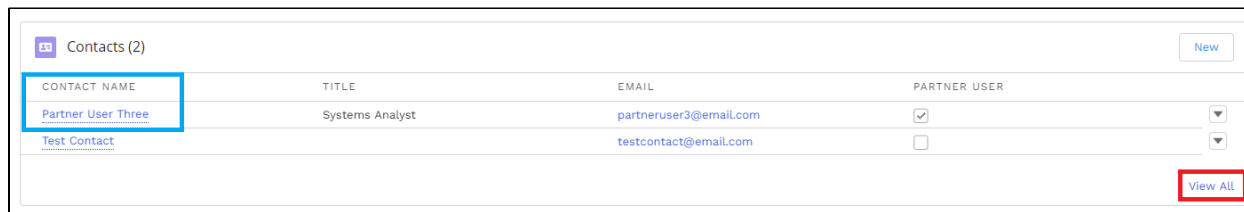
Access Contacts

To manage your contacts, navigate to the “Organizations” tab and click the **Organization Name**, outlined in red below.



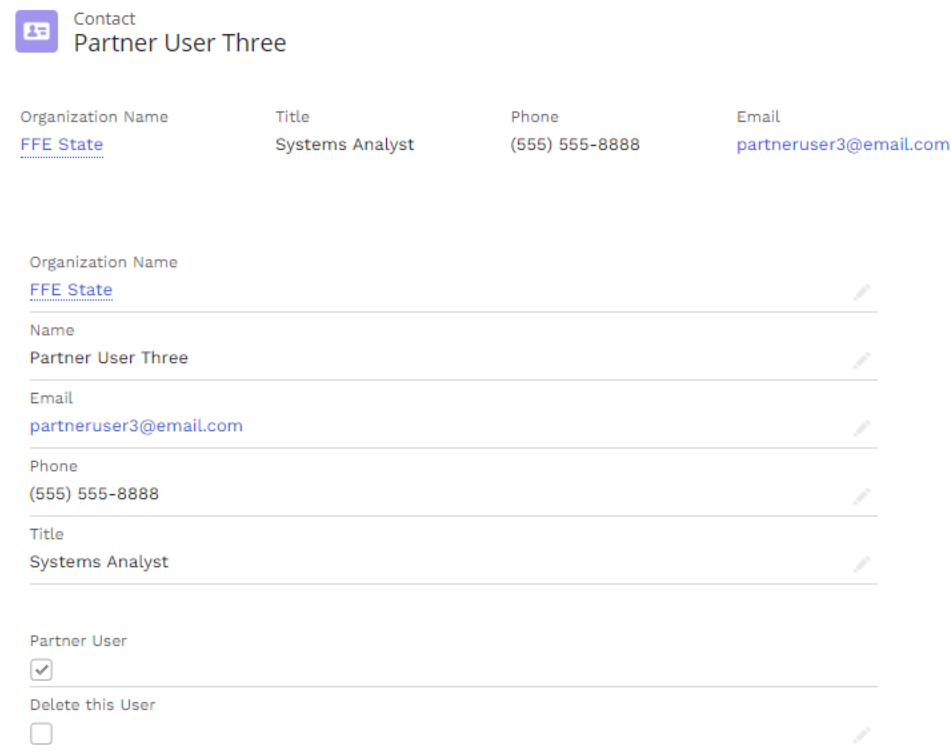
The screenshot shows the CMS interface with the "Organizations" tab selected. The user is logged in as "Partner User Three". The "Organizations" section shows a list of organizations, with "FFE State" highlighted in red. The list is sorted by Organization Name and filtered by all organizations.

The “Contacts” list displays beneath your organization’s name and will show your six most recently viewed contacts. Click **View All**, outlined in red below, to see your contacts display as a list.



The screenshot shows the "Contacts (2)" list for the "FFE State" organization. The list has columns for CONTACT NAME, TITLE, EMAIL, and PARTNER USER. Two contacts are listed: "Partner User Three" (Systems Analyst, partneruser3@email.com) and "Test Contact" (testcontact@email.com). The "View All" link is highlighted in red.

Click on a contact’s name, outlined in blue above, to see their details page, as displayed below.



The screenshot shows the "Contact" details page for "Partner User Three". The page displays the following information:

- Organization Name: [FFE State](#)
- Title: Systems Analyst
- Phone: (555) 555-8888
- Email: partneruser3@email.com

Below this information, there are sections for editing the contact details:

- Organization Name: [FFE State](#)
- Name: [Partner User Three](#)
- Email: partneruser3@email.com
- Phone: (555) 555-8888
- Title: Systems Analyst

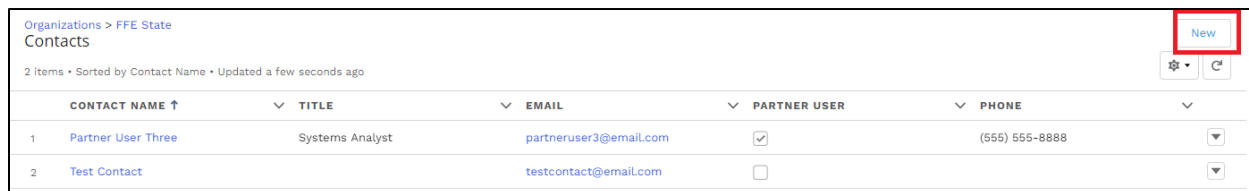
At the bottom, there is a section for the Partner User:

- Partner User: ☒
- Delete this User: ☐

The details page contains the contact's **Name**, **Organization Name**, and **Email** address. **Phone** and **Title** are optional fields and will populate if they were entered for a given contact. The **Partner User** checkbox will be automatically checked when a contact is also a PM Community user.

Add Contacts

To create a new contact, click **New** in the top-right corner of the "Contacts" box or list display, as outlined in red below.



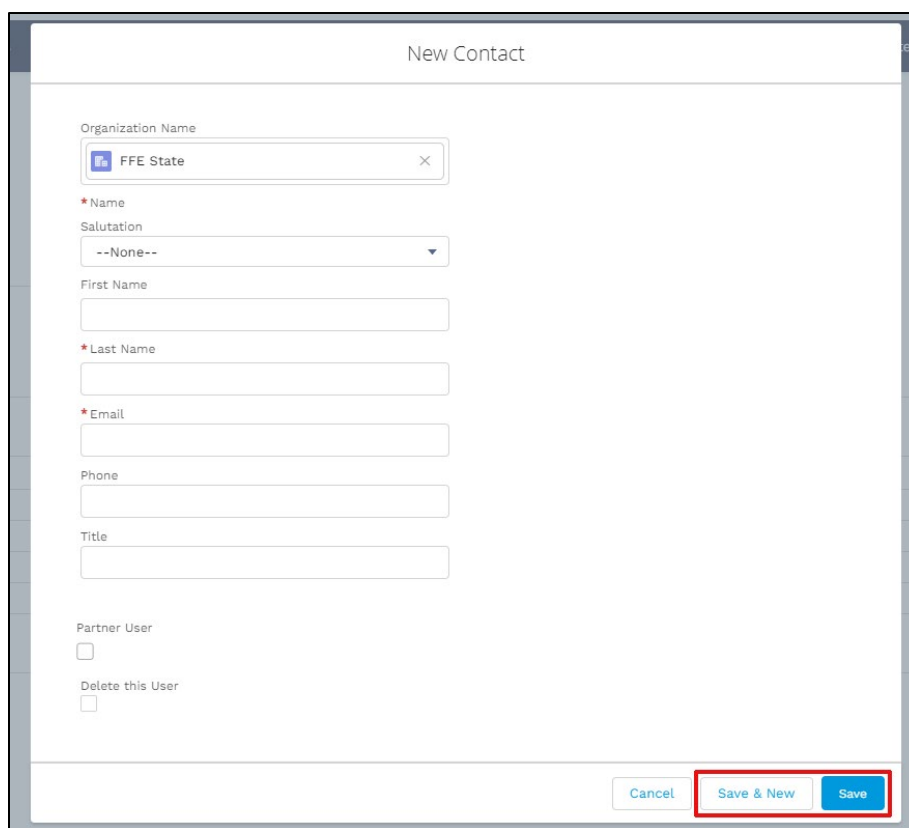
Organizations > FFE State
Contacts

2 items • Sorted by Contact Name • Updated a few seconds ago

	CONTACT NAME ↑	TITLE	EMAIL	PARTNER USER	PHONE	
1	Partner User Three	Systems Analyst	partneruser3@email.com	☒	(555) 555-8888	▼
2	Test Contact		testcontact@email.com	☐		▼

The "New Contact" box will display, as shown below, and the **Organization Name** field will auto-populate with the name of your state. It is important that you do not edit or try to change this field; any changes could mean the contact will not be associated with your state and will not be visible from your account.

Fill in at least the contact's name, last name, and email address. Then, either click **Save** to save the contact and return to the previous screen or click **Save & New** to save the contact and create another new contact. Note that the **Partner User** checkbox cannot be edited.



New Contact

Organization Name
FFE State

* Name
Salutation
--None--

First Name

* Last Name

* Email

Phone

Title

Partner User
☐

Delete this User
☐

Cancel Save & New Save

Edit Contacts

To edit a contact, navigate to either the “Contacts” box on your organization’s page or the “Contacts” list, reached by clicking **View All** from within the “Contacts” box. To make edits, click on the dropdown to the right of the contact’s **Contact Name** column and click **Edit**, outlined in red below.

Contacts (2)				New
CONTACT NAME	TITLE	EMAIL	PARTNER USER	
Partner User Three	Systems Analyst	partneruser3@email.com	☒	Edit
Test Contact		testcontact@email.com	☐	
				View All

When the contact’s information appears, edit as desired and click **Save**, outlined in red below. The **Name**, **Last Name** and **Email** fields are noted with an asterisk; these fields are required and cannot be left blank.

New Contact

Organization Name

FFE State

* Name

Salutation

--None--

First Name

* Last Name

* Email

Phone

Title

Cancel

Save & New

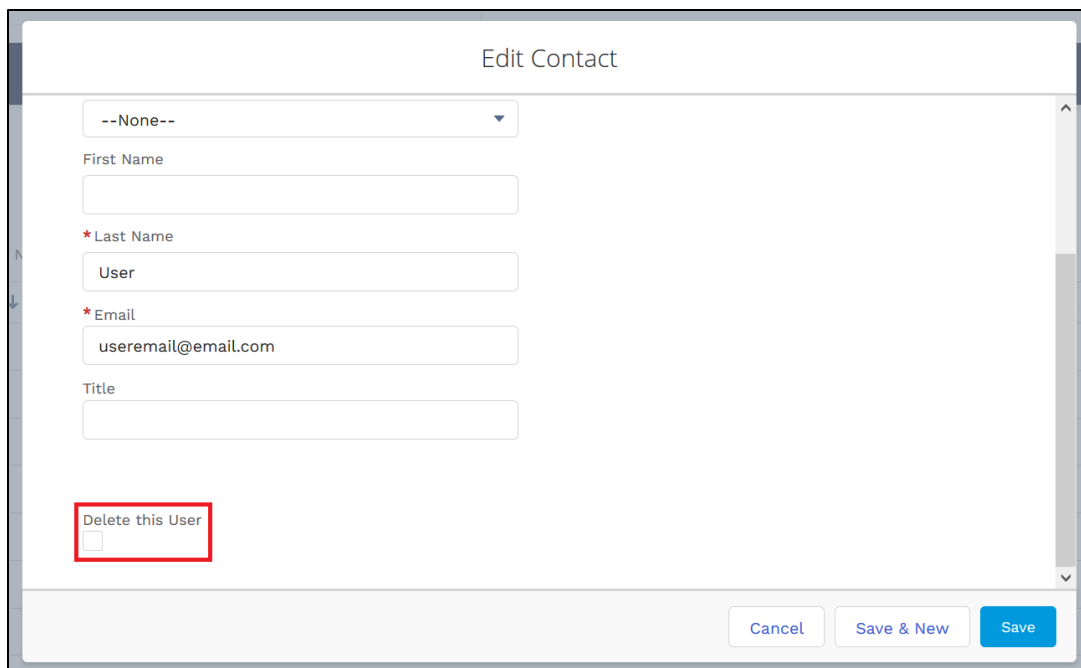
Save

Delete Contacts

To delete a contact, click the dropdown to the right of the contact’s email address and click **Edit**, as outlined in red below.

Contacts (2)				New
CONTACT NAME	TITLE	EMAIL	PARTNER USER	
Partner User Three	Systems Analyst	partneruser3@email.com	☒	Edit
Test Contact		testcontact@email.com	☐	
				View All

When the “Edit Contact” box displays, scroll down and click **Delete this User**, as outlined in red below. Click **Save**.



The contact will not be deleted instantaneously; it may take up to three business days for the deletion request to be processed. If you are updating an individual's name or email address, use the **Edit** functionality instead of deleting and recreating the contact. Checking the **Delete this User** box for a PM Community user will send a request to CMS to delete their contact record and deactivate their access. Please take caution when requesting to delete a partner user, as PM Community access is not easily re-attained once it has been revoked.

PM Community Users

States may not add new PM Community users from within the PM Community. For instructions on how a new PM Community user can request access, please refer to the "Accessing the PM Community" training video, available from the "QHP Certification Resources" tab on the PM Community home page.

If a PM Community user leaves the organization or should no longer have access, another PM Community user in that organization may deactivate the account by following the instructions in the [Delete Contacts](#) section above. Then, follow the instructions in the "Accessing the PM Community" training video to have the replacement request access.

HELPFUL HINTS

- To designate their PM Community users, states should identify the individuals in their organization who do the most hands-on work related to QHP certification.
- PM Community access does not affect access to the Health Insurance Oversight System (HIOS) or the System for Electronic Rates & Form Filing (SERFF).

View State Information and Submit Files in the "States" Tab

The "States" tab provides high-level information about the state, including a list of all of the issuers in the state, and is where you can download notices from CMS and upload completed plan confirmation tables. From the "States" tab, click on the organization name to be taken to the state page, where you can find this information.

Organization
FFE State
State
FFE State
State Abbreviation
FS
State Marketplace Category
FFE
Direct Enforcement State
☐

Files (3)

2019_PlanConfirmationTable
Mar 4, 2019 • 8KB • xlsx

PY19 State Plan Confirmation - Final
Mar 4, 2019 • 8KB • xlsx

PY19 Round 1 Correction State DOI
Mar 4, 2019 • 8KB • xlsx

Add Files
View All

Issuers in State (6)

ISSUER ID	ISSUER LEGAL NAME	PLAN YEAR	PRODUCT TYPE
10000-2018	Issuer A	2018	Dual
10000-2019	Issuer A	2019	Dual
10000-2020	Issuer A	2020	Dual
30000-2020	Issuer C	2020	SADP
30000-2018	Issuer C	2018	SADP
30000-2019	Issuer C	2019	SADP

View All

The “Issuers in State” box on the state’s page lists up to six issuers in the state. To pull up a list containing all issuers, select **View All**, highlighted in red above. To navigate to an issuer’s detail page, click on an **Issuer ID**, also highlighted in red above. The issuers in your state are discussed below in the [View Issuer Information](#) section.

Note that states are also able to view files for issuers in their states by navigating to an issuer’s detail page; select an issuer ID from the “Issuers in State” box on the “States” tab, or from the “Issuers in States” tab. The “Files” box at the bottom of an issuer’s page contains any files that CMS has shared with that issuer. States can download any of these attachments by clicking on a given file’s name.

Working with Files

The “Files” box on the state’s page serves as the place in the PM Community where users can go to download documents from CMS and submit plan confirmation tables.

PM Community contacts will receive email notification from CMS when a new document is uploaded, or when action is required in the system.

View and Download Files

Click on the “States” tab and the state name to pull up the detail page.

Locate the “Files” box above the “Issuers in State” box. Here, you’ll see the most recently uploaded documents. Note that the box will be empty if no files have been added, as shown below.

Files (0)
Upload Files

Upload Files
Or drop files

Click **View All**, available in the lower right corner of the “Files” box if you have one or more documents available, to see a list of all files associated with this issuer ID.

Files (3)

2019_PlanConfirmationTable
Mar 4, 2019 • 8KB • xlsx

PY19 State Plan Confirmation - Final
Mar 4, 2019 • 8KB • xlsx

PY19 Round 1 Correction State DOI
Mar 4, 2019 • 8KB • xlsx

Upload Files

View All

From the list, you may sort by **Title**, **Owner**, **Modified Date**, or **Document Size** (see [Appendix A: Using Lists in the PM Community](#)).

States > FFE State

Files

3 Items • Sorted by Last Modified • Updated a few seconds ago

Upload Files

⚙️

🔄

	Title	Owner	Last Modified	Size	
1	2019_PlanConfirmationTable	Anita Ramanathan	3/4/2019 6:15 PM	8KB	⌵
2	PY19 State Plan Confirmation - Final	Anita Ramanathan	3/4/2019 6:14 PM	8KB	⌵
3	PY19 Round 1 Correction State DOI	Anita Ramanathan	3/4/2019 6:14 PM	8KB	⌵

You may view, download, or upload documents from both the “Files” box or the full “Files” list that appears after selecting **View All**.

To view or download a document, click on the file name and a preview of the document will appear, as shown below.

Draft-2019-Letter-to-Issuers-in-the-Federally-facilitated...

Download

View File Details

Upload New Version

🗑️

Issuers in State (1)

ISSUER ID

1000-2017

Files (1)

Draft-2019-Letter-to-Issuers-in-the-Federally-facilitated...

Mar 23, 2018 • 274KB • pdf

Department of Health & Human Services

Centers for Medicare & Medicaid Services

Center for Consumer Information & Insurance Oversight

200 Independence Avenue SW

Washington, DC 20201



Date: November 27, 2017

From: Center for Consumer Information and Insurance Oversight (CCIIO), Centers for Medicare & Medicaid Services (CMS)

Title: 2019 Draft Letter to Issuers in the Federally-facilitated Exchanges

The Centers for Medicare & Medicaid Services (CMS) is releasing this 2019 Draft Letter to Issuers in the Federally-facilitated Exchanges (FFEs) for the 2019 plan year for issuers seeking to offer qualified health plans (QHPs), including stand-alone dental plans (SADPs), in the Federally-facilitated Exchanges (FFEs) or the Federally-facilitated Small Business Health Options

Page 1 of 28

View All

Add Files

View All

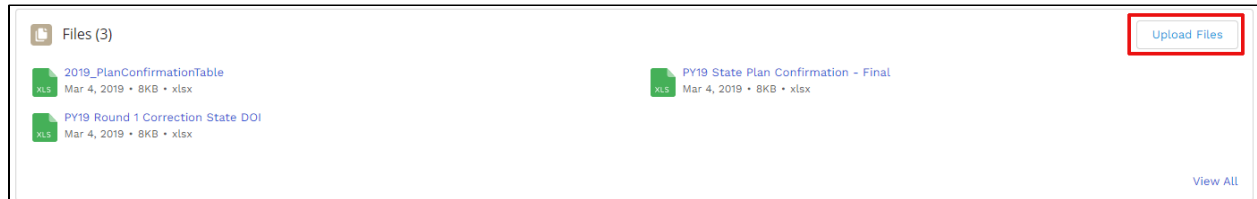
At the top of the screen, you can choose to **Download** the file, **View File Details**, or **Upload a New Version** as outlined in red above. **Upload a New Version** is only available for files you have uploaded. To exit out of the document preview, click the “X” in the top right corner.

Upload Files

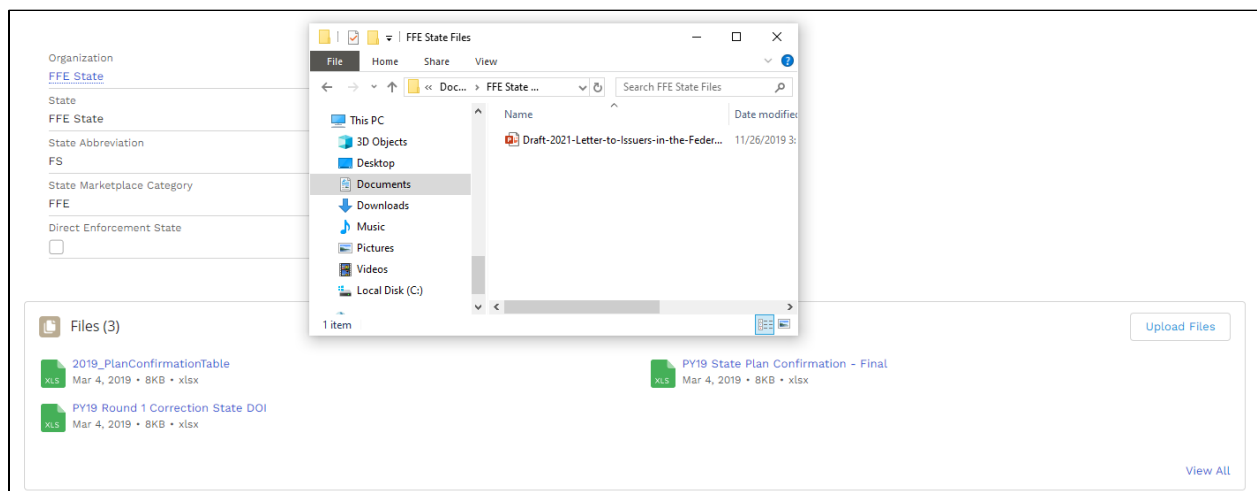
States will upload their completed plan confirmation tables to the PM Community from the “Files” box in the “States” tab. Other documents may also be uploaded, but these will only be reviewed by CMS if specifically requested.

Access the “Files” box or list using the same process described above in [View and Download Documents](#). To upload a new version of an existing document, click on the file name and a preview of the document will appear. Select **Upload a New Version** from the top of the screen. Make sure the new document name matches the current document name and follow the prompts to complete the upload.

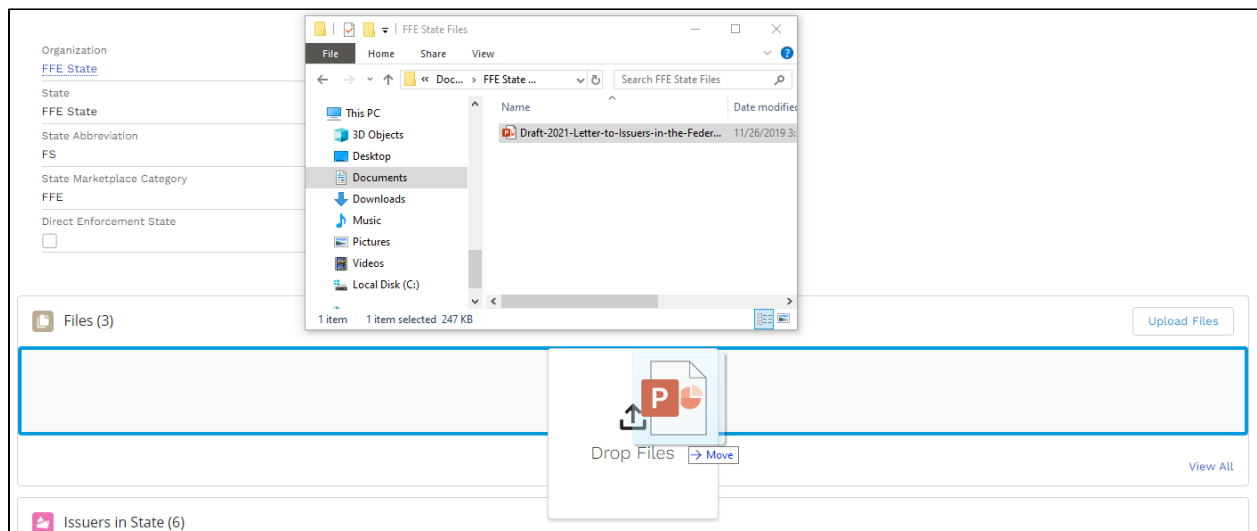
You may add new files by clicking **Upload Files**, outlined in red below, from either the “Files” box on the state detail page or the “Files” list reached by clicking **View All** on the “Files” box.



The **Upload Files** button gives you the option to upload a new file from your computer.



You may also upload a document by simply dragging the file from the folder on your computer and dropping it into the “Files” box, as displayed below.



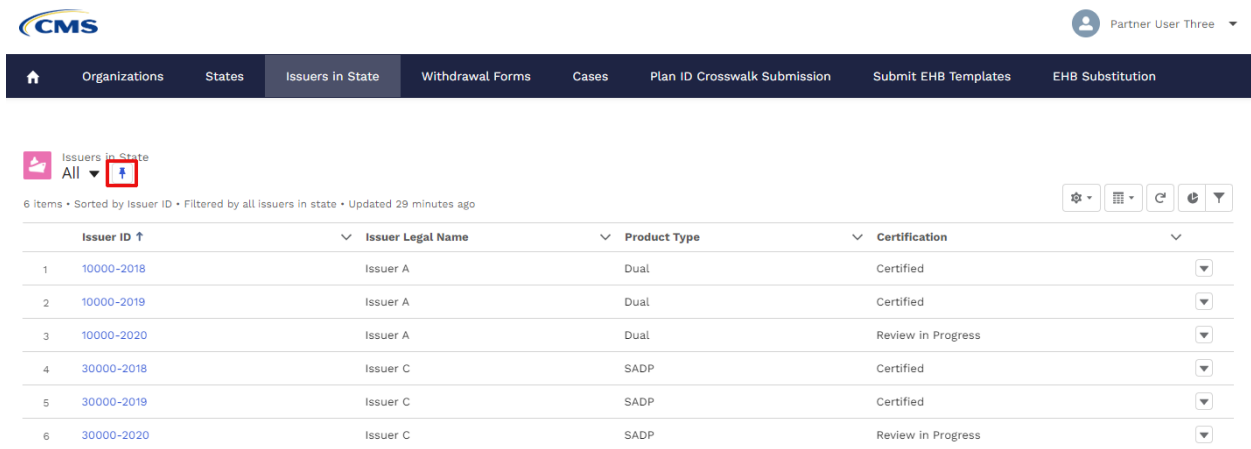
A progress bar will appear to show the status of your upload. When it is finished, a green checkmark will appear. Click **Done** to return to the state detail page.

View Plans and Issuers in the “Issuers in State” Tab

The “Issuers in State” tab shows all the issuer IDs associated with your state. This tab is used to access information about each issuer including their plan IDs. The issuer ID used in the PM Community is a combination of the HIOS Issuer ID and the plan year (e.g., 12345-2019). The PM Community contains unique records for each issuer ID/plan year combination.

View Issuer Information

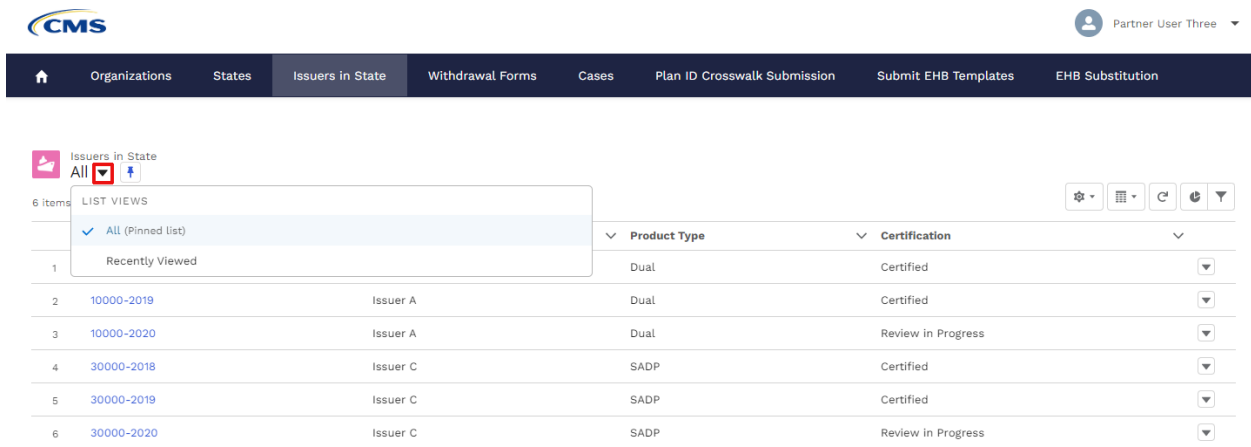
Click on the “Issuers in State” tab, displayed below, to see a list of the issuer IDs associated with your state.



6 Items • Sorted by Issuer ID • Filtered by all Issuers in State • Updated 29 minutes ago

Issuer ID ↑	Issuer Legal Name	Product Type	Certification
1 10000-2018	Issuer A	Dual	Certified
2 10000-2019	Issuer A	Dual	Certified
3 10000-2020	Issuer A	Dual	Review in Progress
4 30000-2018	Issuer C	SADP	Certified
5 30000-2019	Issuer C	SADP	Certified
6 30000-2020	Issuer C	SADP	Review in Progress

Use the dropdown menu to filter the issuer IDs by clicking the downward facing arrow, outlined in red below. See [Appendix A: Using Lists in the PM Community](#) for more information on navigating this list. Once you filter the list, you have the ability to “pin” this list view by selecting the pin icon, outlined in red above; this tab will default to the selected list view moving forward unless you pin another list view.



6 Items • LIST VIEWS

- ✓ All (Pinned list)
- Recently Viewed

Product Type	Certification
Dual	Certified
Dual	Certified
Dual	Review in Progress
SADP	Certified
SADP	Certified
SADP	Review in Progress

Clicking on any of the issuer IDs in the list will take you to the issuer’s detail page, shown below, with more information about the issuer and its associated plans. The “Information” box, outlined in red below,

displays at the top of the page and contains details about the issuer, including the **Issuer ID**, **State**, **State Category**, **Product Type**, **Market Type**, **Plan Year**, **Issuer's Legal Name**, **Account Manager**, and **Certification** status.

The "Submission Details" box, also outlined in red below, displays the date of when the issuer's QHP Application was last updated or transferred. For issuers that submit their data via HIOS, the "Submission Details" box will show when the issuer's application was last cross-validated.

Information

Issuer ID

10000-2019

State

FS

State Category

FFE

Product Type

Dual (QHP and SADP)

Market Type

Both (Individual and SHOP)

Plan Year

2019

Issuer Legal Name

Issuer A

Account Manager

account.manager@cms.hhs.gov

Certification

Certified

Submission Details

Application Last Updated/Transferred

8/22/2018

Application Last Cross-Validated

8/22/2018

Note that it may take up to two business days for an issuer's submission to be updated in the PM Community.

Below the "Submission Details" box is the "Plans" box.

View Plans

As with issuers, plan IDs in the PM Community are a combination of the plan ID and the plan year. This allows the PM Community to store unique records for each plan ID/plan year combination.

The "Plans" box on an issuer's detail page, shown below, displays only the plans associated with that issuer. The "Plans" box will display the six most recently-viewed plans; click **View All**, outlined in red below, to view all plans associated with that issuer.

Plans (2)			
PLAN ID	INDIVIDUAL/SHOP	QHP/SADP	METAL LEVEL
10000FS0100001-2019	Individual	QHP	Silver
10000FS0120001-2019	Individual	SADP	Low
			View All

The "Plans" list displays all plans for all issuer IDs associated with a parent organization. See [Appendix A: Using Lists in the PM Community](#) for more information on using this list.

To view more details about a plan, click on the **Plan ID**. The plan's detail page contains three sections: **Issuer Information**, **Plan Information**, and **Status on the Marketplace**.

The "Issuer Information" box, shown below, contains detail about the issuer, including the **Issuer ID**, **Legal Name**, **State**, **Plan Year**, and **Exchange Category**.

▼ Issuer Information	
Issuer ID 10000-2019	State FS
Issuer Legal Name	Plan Year 2019
Issuer A	Exchange Category FFE

The “Plan Information” box, shown below, contains details specific to the plan. This includes **Plan ID**, **Market Type**, **Product Type**, **Plan Type**, **Metal Level**, **Exchange Type**, , and the cross-validation status of each module.

▼ Plan Information	
Plan ID 10000FS0120001-2019	Benefit Module Status Cross Validations Completed
Individual/SHOP Individual	Issuer Module Status Cross Validations Completed
QHP/SADP SADP	Rating Module Status Cross Validations Completed
Plan Type PPO	
Metal Level Low	
On or Off the Exchange Both	

The “Status on the Marketplace” box, shown below, will display the plan’s withdrawal status and certification status.

▼ Status on the Marketplace	
Withdrawal Status Withdrawn	
Certification Certified	

Note that it may take up to two business days for an issuer’s submission to be updated in the PM Community.

Submit Withdrawal Forms from the “Withdrawal Forms” Tab

States may submit withdrawal forms through the PM Community, rather than emailing them to the [Marketplace Service Desk \(MSD\)](#).

View Withdrawal Forms

Withdrawal forms may be accessed from the “Withdrawal Forms” tab. This tab displays all withdrawal forms submitted by the state, and by issuers in the state, through the PM Community. Click **Plan Form Name**, outlined in red below, to view details about the form, including the affected plan IDs.

 Partner User Three

Organizations States Issuers in State **Withdrawal Forms** Cases Plan ID Crosswalk Submission Submit EHB Templates EHB Substitution

Form All

2 Items • Sorted by Issuer ID • Filtered by all form • Updated a few seconds ago

	Plan Form Name	Form Type	Issuer ID	Issuer Legal Name	Created By
1	PWN00095	QHP Plan Withdrawal Notification Form	10000-2019	Issuer A	Partner User One
2	PWN00098	QHP Plan Withdrawal Notification Form	10000-2019	Issuer A	Partner User Two

Submit Withdrawal Forms

To submit a withdrawal form, navigate to the “Withdrawal Forms” tab, displayed below. Click **New**, outlined in red below, to create a new form.

 Partner User Three

Organizations States Issuers in State **Withdrawal Forms** Cases Submit EHB Templates EHB Substitution

Form All **New**

1 Item • Sorted by Plan Form Name • Filtered by all form • Updated a few seconds ago

	PLAN FORM NAME	FORM TYPE	ISSUER ID	ISSUER LEGAL NAME	CREATED BY
1	PWN00095	QHP Plan Withdrawal Notification Form	10000-2019	Issuer A	

Use the **Issuer ID** field, outlined in red below to look up the issuer ID. Begin typing in the issuer ID until it displays in the menu underneath the box and then select the correct issuer ID, outlined in red below. If you enter the issuer ID as text rather than selecting it from the menu, it may not associate correctly with that issuer’s account and may cause a delay in processing the withdrawal.

New Form: QHP Plan Withdrawal Notification Form

Information

Plan Form Name Status
New

*Issuer ID

100

“100” in Issuers

10000-2019
Issuer A

10000-2018
Issuer A

10000-2020
Issuer A

Complete this Section Only for Full Issuer Withdrawal

Complete the form and click **Save**, outlined in red below. Fields with an asterisk are required, and you only need to complete one of the two lower sections, as applicable: **Complete this Section Only for Full Issuer Withdrawal** or **Complete this Section to Withdraw One or More QHPs**.

New Forms: QHP Plan Withdrawal Notification Form

*Select the Options that Apply ⓘ

--None--

Specifics for Other ⓘ

Created By Last Modified By

Complete this Section Only for Full Issuer Withdrawal

Full Issuer Withdrawal ☐ Full Issuer Withdrawal Consent
We consent to a full Issuer withdrawal for plan...

Complete this Section to Withdraw One or More QHPs

Cancel Save & New **Save**

Once you click **Save**, the form is submitted and a confirmation message appears, as shown below.



View Corrections in the “Issuers in State” Tab

States may also use the “Corrections” box for each issuer found on the “Issuers in State” tab to view all active corrections for their issuers as they are posted. During each review round, corrections will display once each review is complete. To access corrections, navigate to the “Issuers in State” tab, select an **Issuer ID**, and scroll to the bottom of the issuer’s page.

Corrections (4)			
CORRECTIONS ID	REVIEW AREA	STATUS	REVIEW ROUND
D-54705	Administrative	Archived	Round 1
D-54706	CSR - Plan Variation	Archived	Round 1
D-54707	CSR - Plan Variation	Active	Round 2
D-54708	Administrative	Active	Round 2
View All			

The “Corrections” box contains all corrections for that plan year and issuer, though it defaults to a display of only six. Click **View All**, outlined in red above, to see the full list of corrections for that plan year and issuer. You can also use the “Status” filter to sort this list so that active corrections appear at the top, and archived corrections appear below.



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Issuers > 10000-2020
Corrections

5 Items • Sorted by Status • Updated a few seconds ago

Corrections ID	Review Area	Status ↓	Review Round	Correction Code	Review Results
1 D-54707	CSR - Plan Variation	Active	Round 2		No corrections are required for this review area.
2 D-54708	Administrative	Active	Round 2		No corrections are required for this review area.

Clicking on any corrections record will bring up a corrections detail page with additional information about the correction, including the relevant **Review Round**, **Review Area**, and **Expected CMS Communication**. Following each round of review, CMS determines whether outreach is required to address each correction with the issuer; as of plan year 2020, those outreach decisions display in this field for each correction record.



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Corrections

D-54707

Corrections ID

D-54707

Issuer ID ⓘ

10000-2020

Review Area ⓘ

CSR - Plan Variation

Standard Component ID ⓘ

Correction Code ⓘ

Review Results ⓘ

No corrections are required for this review area.

CCIO Comments ⓘ

Date

9/11/2018 2:15 PM

Review Round

Round 2

Status ⓘ

Active

Expected CMS Communication ⓘ

CMS will not request a call. If necessary, please submit corrected data in your next submission.

View Plan ID Crosswalk Submissions in the “Plan ID Crosswalk Submission” Tab

Issuers use the PM Community to submit their Plan ID Crosswalk Templates and supporting documentation to CMS throughout the QHP Application process. States can use the “Plan ID Crosswalk Submission” tab to review Plan ID Crosswalk Template submissions from issuers in their state. This tab includes submissions from current and past plan years. This tab features the Crosswalk Template **Name**, **Issuer**, **Issuer Name**, **Organization**, **State**, **Status**, and the date the submission was created.



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[All](#)




6 items • Sorted by Cross Name • Filtered by all plan id crosswalk submission • Updated a few seconds ago

	Cross Name ↑	Issuer	Issuer Name	Organization	State	Status	Created Date	
1	CT-000669	10000-2020	Issuer A	Parent Organization XYZ	FS	Submitted	5/1/2019 3:39 PM	▼
2	CT-000672	30000-2018	Issuer C	Parent Organization XYZ	FS	New	5/28/2019 10:47 AM	▼
3	CT-000694	10000-2020	Issuer A	Parent Organization XYZ	FS	New	10/17/2019 4:39 PM	▼
4	CT-000695	30000-2019	Issuer C	Parent Organization XYZ	FS	New	10/21/2019 6:00 PM	▼
5	CT-000696	30000-2020	Issuer C	Parent Organization XYZ	FS	Submitted	10/21/2019 6:01 PM	▼
6	CT-000697	10000-2019	Issuer A	Parent Organization XYZ	FS	Retrieved	10/21/2019 6:02 PM	▼

To view a Plan ID Crosswalk Template submission, click the **Cross Name**, outlined in red above. The “Template Details” page contains the same information found on the “Plan ID Crosswalk Submission” tab.



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 CT-000669

View Files

 Template Details

Cross Name
CT-000669

Issuer ID
[10000-2020](#)

Issuer Name
Issuer A

State
FS

Status
Submitted

Owner
 [Partner User One](#)

On the “Template Details” page, select the “View Files” button, outlined in red above, to view the files associated with the submission. A “View Files” pop-up will appear, and display all associated files.

Next Steps

Once you have read through this user guide and familiarized yourself with the layout and functionalities of the PM Community, CMS encourages you to watch the PM Community Video Series found in the “QHP Certification Resources tab” within the “Home” tab.

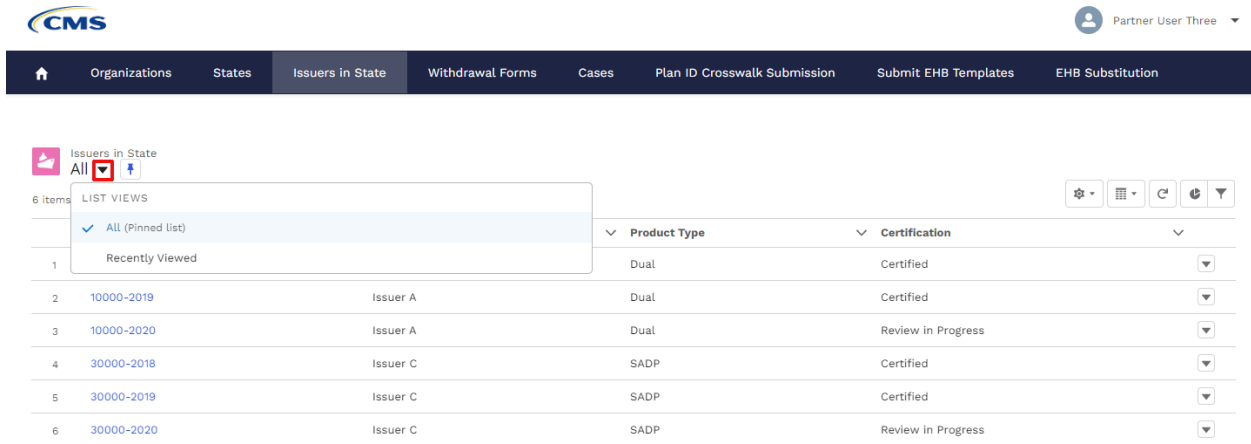
Next, confirm that your state has at least two active PM Community users; new users should follow the established steps to request access. Then, identify all of the contacts in your state that should receive emails from CMS related to QHP certification. Add or update your contacts as needed. Finally, continue to watch your email for notifications about new updates, QHP Application corrections, or plan confirmation activities.

Appendix A: Using Lists in the PM Community

Most of the tabs in the PM Community present information in lists. These lists may be both sorted and filtered. Users may also adjust column width and select whether any text exceeding the column width is wrapped or clipped.

Filter Lists

Most lists have a dropdown menu towards the upper left of the screen under the tab title, outlined in red below. Lists that do not have this dropdown menu will display all records.

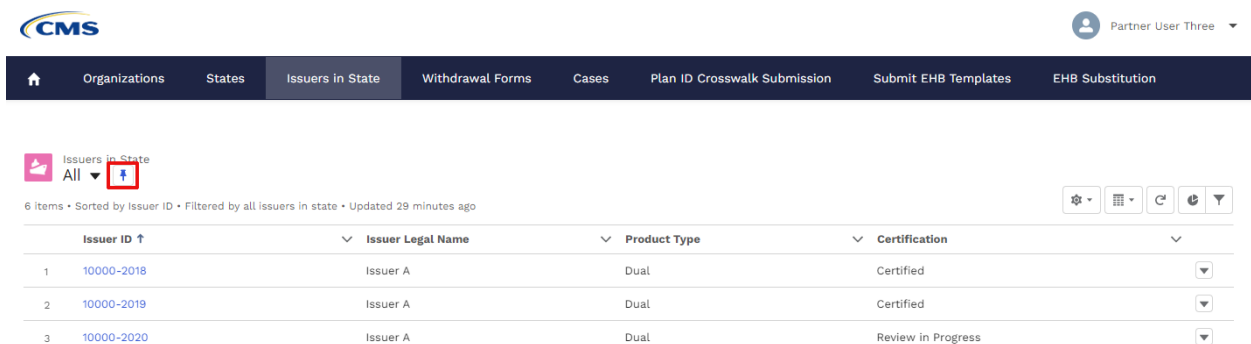


Issuer ID	Issuer Legal Name	Product Type	Certification
10000-2019	Issuer A	Dual	Certified
10000-2020	Issuer A	Dual	Review in Progress
30000-2018	Issuer C	SADP	Certified
30000-2019	Issuer C	SADP	Certified
30000-2020	Issuer C	SADP	Review in Progress

Filter the information available to you in the list from this dropdown, outlined in red above. You may see the following options, depending on the list you're viewing:

- **All:** Displays data for all plan years.
- **Recently Viewed:** Limits display to those records you have opened and viewed, generally up to the ten most recently viewed records.
- **Plan Year-Specific:** Limits records to those from a specific plan year. This option is only available for the list in the Issuers in State tab.

You can also use the pin feature to the right of the filter dropdown, outlined in red below, to pin a list view. Once you filter the menu in a tab, you have the ability to “pin” this list view; this tab will default to the list view upon subsequent logins unless you pin another list view. Unless you have already pinned a list view, lists in the PM Community default to “All.”



Issuer ID	Issuer Legal Name	Product Type	Certification
10000-2018	Issuer A	Dual	Certified
10000-2019	Issuer A	Dual	Certified
10000-2020	Issuer A	Dual	Review in Progress

Sort Lists

You can sort the information in your list by any of the columns that appear on the page. Click on the arrow that appears to the right of the title, outlined in red below, when you hover over it. When the arrow is pointing up, the column is sorted alphabetically. Click again to sort the list in reverse alphabetical order, indicated by the arrow pointing down.

Organizations > FFE State
Contacts

2 Items • Sorted by Contact Name • Updated a few seconds ago

New

Settings Copy

	CONTACT NAME ↑	TITLE	EMAIL	PARTNER USER	PHONE	
1	Partner User Three	Systems Analyst	partneruser3@email.com	☒	(555) 555-8888	▼
2	Test Contact		testcontact@email.com	☐		▼

Adjust Columns

On the right side of each column is a dropdown arrow, outlined in red below. This dropdown will allow you to choose between wrapped text and clipped text. Wrapped text will continue onto a new line if the text is too long to fit within the column width, while clipped text will simply remove any text that does not fit within the column width.

Organizations > FFE State
Contacts

2 Items • Sorted by Contact Name • Updated a minute ago

New

Settings Copy

	CONTACT NAME ↑	TITLE	EMAIL	PARTNER USER	PHONE	
1	Partner User Three	Systems Analyst	partneruser3@email.com	☒	(555) 555-8888	▼
2	Test Contact		testcontact@email.com	☐		▼

To the right of the dropdown, you can adjust the width of each column by dragging the vertical cursor left and right, shown below.

Issuers > 10000-2019
Plans

2 Items • Updated a few seconds ago

Settings Copy

	PLAN ID	INDIVIDUAL/SHOP	QHP/SADP	METAL LEVEL	ON OR OFF THE EXCH...	CERTIFICATION	SUPPRESSION S1
1	10000FS0100001-2019	Individual	QHP	Silver	Both	Certified	
2	10000FS0120001-2019	Individual	SADP	Low	Both	Certified	

To reset your column widths to their default settings, click on the wheel icon dropdown in the top-right corner, and click **Reset Column Widths**, shown in red below. Note that this option may not be available for all lists in the PM Community.

Issuers > 10000-2019
Plans

2 Items • Updated 2 minutes ago

Settings Copy

	PLAN ID	INDIVIDUAL/SHOP	QHP/SADP	METAL LEVEL	ON OR OFF THE EXCH...	CERTIFICATION	LIST VIEW CONTROLS	SUPPRESSION S1
1	10000FS0100001-2019	Individual	QHP	Silver	Both	Certified	Reset Column Widths	
2	10000FS0120001-2019	Individual	SADP	Low	Both	Certified		

Edit List Information

Edit functionality within the PM Community is limited to the “Contacts” list.

To edit a contact from the list view, click on the dropdown arrow at the far right of the list and click **Edit**.

Contacts (2) New			
CONTACT NAME	TITLE	EMAIL	PARTNER USER
Partner User Three	Systems Analyst	partneruser3@email.com	☒
Test Contact		testcontact@email.com	☐
Edit View All			

The “Edit Contact” box will display. Make updates to the editable fields as needed, and then click **Save**. Fields with an asterisk are required and may not be left blank. The “Partner User” field is locked and may not be edited.

Edit Contact

Organization Name

FFE State

* Name

Salutation

--None--

First Name

Test

* Last Name

User2

* Email

test.user@email.com

Phone

Title

Cancel

Save & New

Save

Other List Controls

There are several icons towards the upper right of each list, outlined in red below. PM Community users will rarely have a use for these list controls, but each one is explained below. Note that these icons may not appear on every list.

- **List View Controls (wheel icon):** For most list views, users may select Reset Column Widths to reset the column widths to their default values.
- **Display As (table icon):** Defaults to “display as table.” Other views are not applicable to PM Community users.
- **Refresh (round arrow icon):** Refreshes the list so that any new data added since the page was last loaded will display.
- **Edit List (pencil icon):** This functionality is not applicable to PM Community users.
- **Charts (pie chart icon):** This functionality is not applicable to PM Community users.
- **Filters (funnel icon):** This functionality is not applicable to PM Community users.

