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Marketplace Plan Management System Issuer User Guide

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1 Introduction

This document provides an overview and step-by-step guide on how to use the Marketplace Plan Management System (MPMS).

MPMS is a web application where users can validate plan data, as well as submit their Qualified Health Plans (QHPs) and Stand-Alone Dental Plans (SADPs) to the Centers for Medicare and Medicaid Services (CMS) for review and certification.

MPMS provides users with all capabilities necessary to complete the plan certification process, and is divided into three primary sections:

- **Plan Validation Workspace:** All Issuers should utilize the validation workspace by uploading their QHP templates XML's for validation and receive validation results prior to the QHP Certification window opening at any time, including prior to the submission of a QHP Application (starting in PY2024).
- **QHP Applications:** Federally-Facilitated Exchange (FFE) Issuers may create new QHP Applications, as well as view existing applications (Data submitted prior to April 19, 2023 will not be visible). Any application in the system may be updated based on CMS Standards (i.e. Certification Window Deadlines, locked applications under review).

1.1 User Guide Notes

This document provides screenshots and corresponding narrative to describe how to use MPMS. Buttons requiring action are indicated by "apostrophes". Links requiring action are indicated by underlined blue text. The term "user" is used throughout this document to refer to an individual with access to MPMS.

2 Getting Started

To ensure that the user is able access MPMS, this section describes the recommended setup for the user's web browser, as well as recommendations to access and navigate the system. The web page design aligns to the CMS.gov web brand and is Section 508 compliant.

2.1 Supported Browsers and Browser Settings

To optimize user experience within MPMS:

1. Disable pop-up blockers prior to accessing MPMS.
2. Use one of the following browsers (latest version available for supported operating systems as of 10/18/2022):
    - Edge 107
    - Firefox 106
    - Chrome 109
3. Request the URL be added to the company's whitelist.

Note: The system complies with Health and Human Services (HHS) design standards: all associated webpages are designed for viewing at a minimum screen resolution of 1280 x 1024.

2.2 User Role

All users must have a CMS Enterprise Portal Identifier (ID) and HIOS user role to access the system. Issuers are required to have a PM Issuer Submitter role to access MPMS, and State users must have a PM State Reviewer role. For further details on how to establish a CMS Enterprise Portal ID, refer to the Enterprise Portal User Guide. For further details on how to request a PM Issuer Submitter role, please refer to the Identity Management User Guide.

2.3 Accessing the System

Login steps for accessing MPMS:

1. Navigate to the CMS Enterprise Portal Login page.
2. Enter User ID and Password into the field.
3. Select the ‘I agree to the Terms & Conditions’ check box.
4. Select the green ‘Login’ button.
5. In My Portal Select the HIOS icon.
6. Select ‘Overview’.
7. Select the ‘Access HIOS’ link.
8. Select the green ‘Launch This Module’ button for the Marketplace Plan Management Module.
9. Select ‘Access the Marketplace Plan Management System module’ link.

2.4 Exiting the System

To exit MPMS, select the Logout link located in the top right corner of the page header. *See Figure 2-1.*

Figure 2-1. Logout

3 MPMS Functionality Overview

MPMS consists of the Home page, the Plan Validation Workspace, and the QHP Application page.

1. **Home page:** The Home page is the first screen users see when navigating to MPMS. It provides the user with the ability to view announcements pertaining to their applications, metrics about any QHP Applications they may have started for the current plan year, and easy navigation to other areas of the system.
2. **Plan Validation Workspace:** The Plan Validation Workspace is used to upload and validate QHP templates. Users may upload one or more templates at a time for validation, as well as cross validate the current templates uploaded in the system for a given Issuer ID and Plan Year.

3. **QHP Application:** The QHP Application screens are used to create or edit an existing application. Users may link valid QHP templates they uploaded in the Plan Validation Workspace to their QHP Application, complete Attestations, and provide supplemental documentation relating to their submission. Users may also view any review results provided by CMS regarding their QHP Application.

The following sections provide instructions about using the various functions and features of MPMS.

4 Home Page

The Home page is the first page users see when navigating to MPMS, and is also the Main Navigation screen. It provides the user with the ability to navigate to the Plan Validation Workspace and QHP Applications, as well as shows metrics for any applications the user has access to. *See Figure 4-1.*

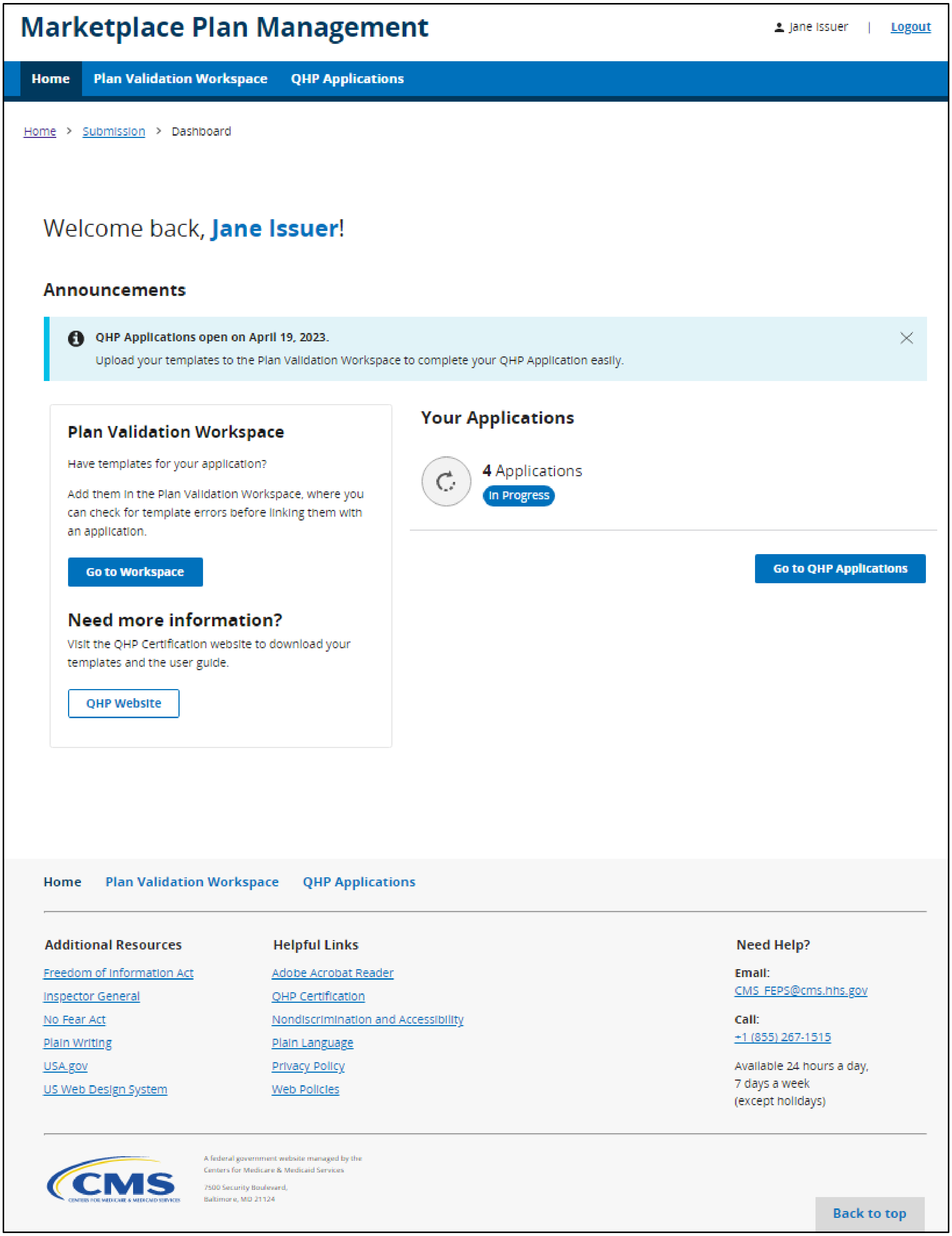


Figure 4-1. Home Page

5 Plan Validation Workspace

The Plan Validation Workspace is used to upload, validate, and cross-validate QHP templates. Prior to using the Workspace, users must complete their QHP template and use the Finalize macro to generate an XML or ZIP file to upload. Instructions for using the Workspace are detailed in the sections below.

5.1 Uploading Templates for Validation

When first arriving at the Plan Validation Workspace, the user is required to select the Plan Year and Issuer they wish to validate templates for, then select the 'Show Workspace' button to begin uploading files for validation. *See Figure 5-1.*

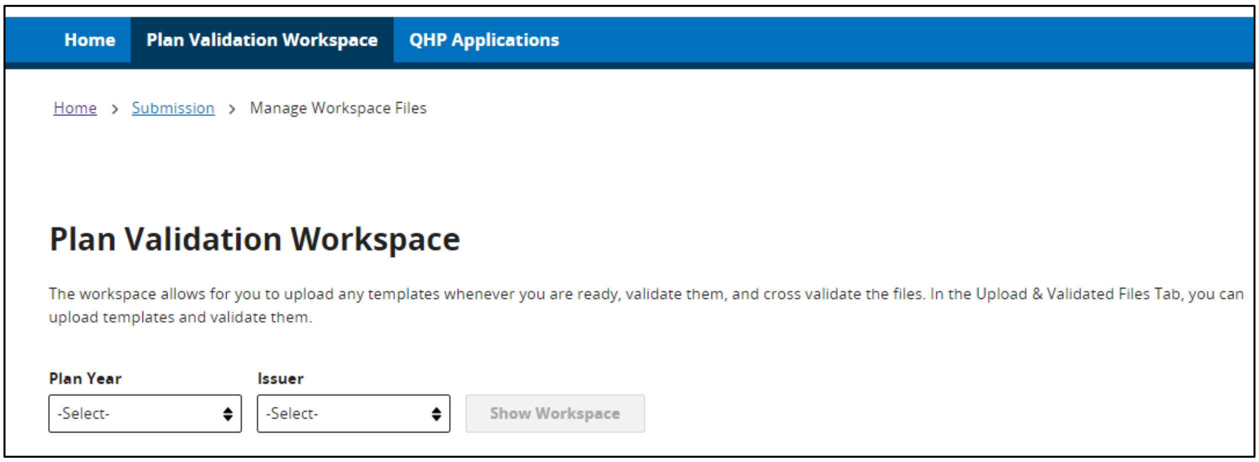


Figure 5-1. Show Workspace

Upon selecting 'Show Workspace,' an Upload Files section will appear where the user can upload files for validation. The user may select 'choose from folder' or drag and drop files into the Upload Files section for validation. *See Figure 5-2.*

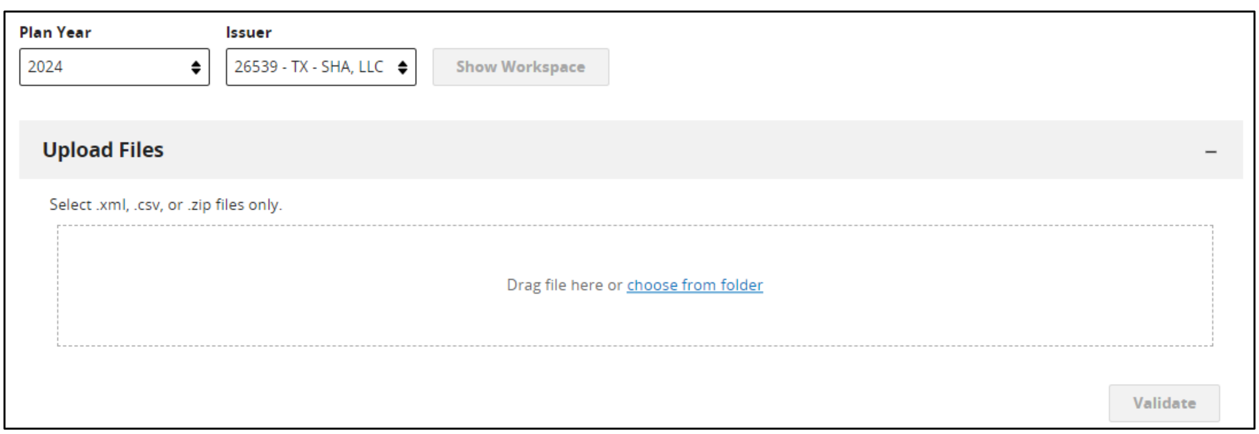


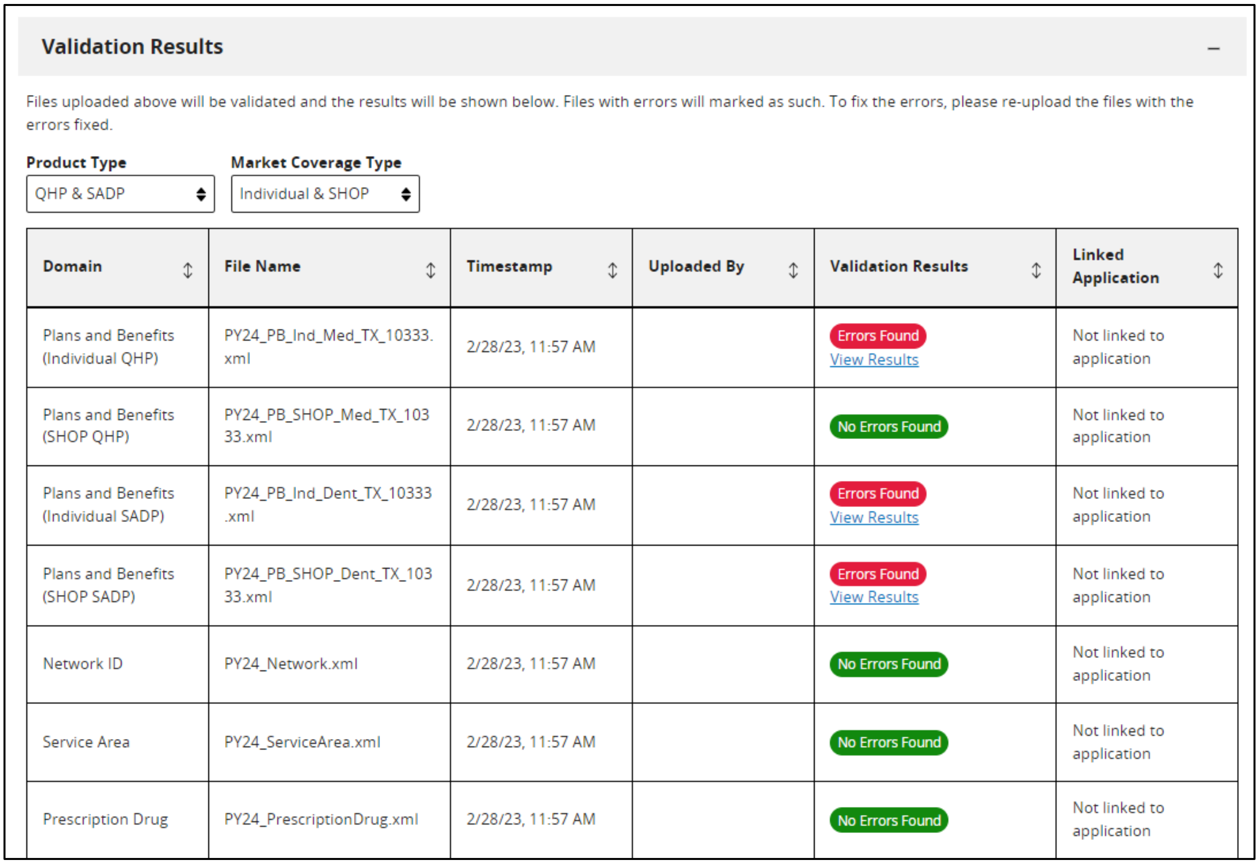
Figure 5-2. QHP Templates Uploaded

The system automatically identifies the type of template uploaded and displays that to the user. The user may select the 'Validate' button to submit the files for validation or choose to remove a file by selecting the trash can icon.

5.2 Viewing Template Validation Results

Once templates have been submitted for validation, the Validation Results section will display to the user. *See Figure 5-3.*

Note: When a user submits a template for validation through SERFF, those validations results will also display in the Validation Results section and can be identified by the Uploaded By value of "SERFF"



Validation Results

Files uploaded above will be validated and the results will be shown below. Files with errors will marked as such. To fix the errors, please re-upload the files with the errors fixed.

Product Type: QHP & SADP

Market Coverage Type: Individual & SHOP

Domain	File Name	Timestamp	Uploaded By	Validation Results	Linked Application
Plans and Benefits (Individual QHP)	PY24_PB_Ind_Med_TX_10333.xml	2/28/23, 11:57 AM		Errors Found View Results	Not linked to application
Plans and Benefits (SHOP QHP)	PY24_PB_SHOP_Med_TX_10333.xml	2/28/23, 11:57 AM		No Errors Found	Not linked to application
Plans and Benefits (Individual SADP)	PY24_PB_Ind_Dent_TX_10333.xml	2/28/23, 11:57 AM		Errors Found View Results	Not linked to application
Plans and Benefits (SHOP SADP)	PY24_PB_SHOP_Dent_TX_10333.xml	2/28/23, 11:57 AM		Errors Found View Results	Not linked to application
Network ID	PY24_Network.xml	2/28/23, 11:57 AM		No Errors Found	Not linked to application
Service Area	PY24_ServiceArea.xml	2/28/23, 11:57 AM		No Errors Found	Not linked to application
Prescription Drug	PY24_PrescriptionDrug.xml	2/28/23, 11:57 AM		No Errors Found	Not linked to application

Figure 5-3. Validation Results

The user may filter the validation results in the table using the 'Product Type' and 'Market Coverage Type' filters at the beginning of the section. The possible Validation Results are described in the table below.

Table 5-1. Validation Results

Validation Result Badge	Description
No Errors Found	The template XML passed all validations.
Warnings Found	The template XML is acceptable, but the user may need to provide a justification if the template is linked to a QHP Application, or there is an unexpected data condition CMS would like to flag to the user.
Errors Found	The template XML contains Errors and requires corrections before the template can be linked to the QHP Application. This status will also display if there are errors and warnings present in the template.
Processing Error	The template XML cannot be processed by the system due to a file format issue. Try generating a new XML file using the Finalize macro in the template and re-uploading. If the issue continues, contact the help desk.

If the template has a status of “Warnings Found” or “Errors Found,” the user may select the ‘View Results’ link to view the detailed validation messages. *See Figure 5-4.*

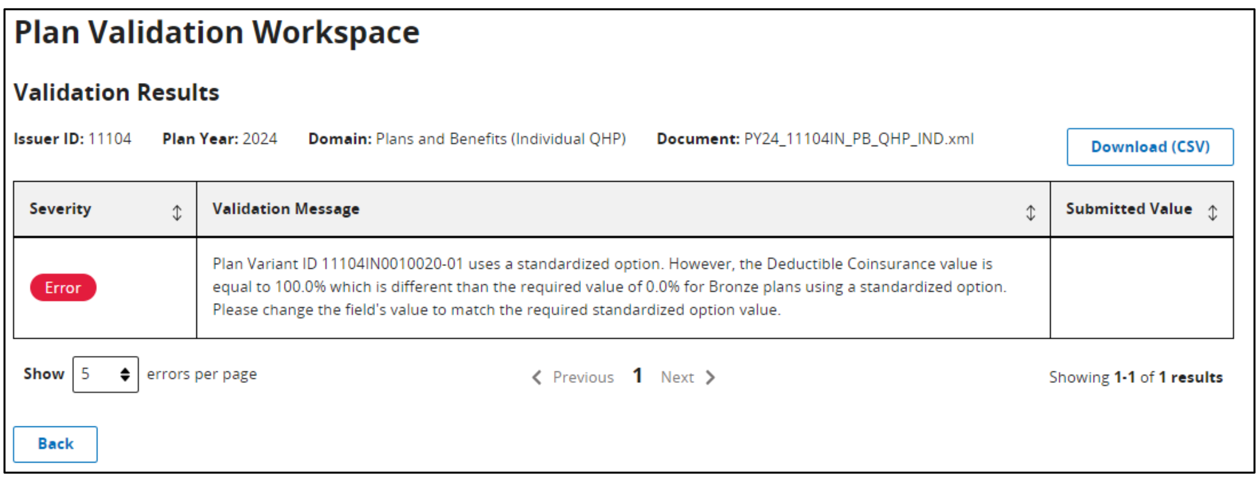


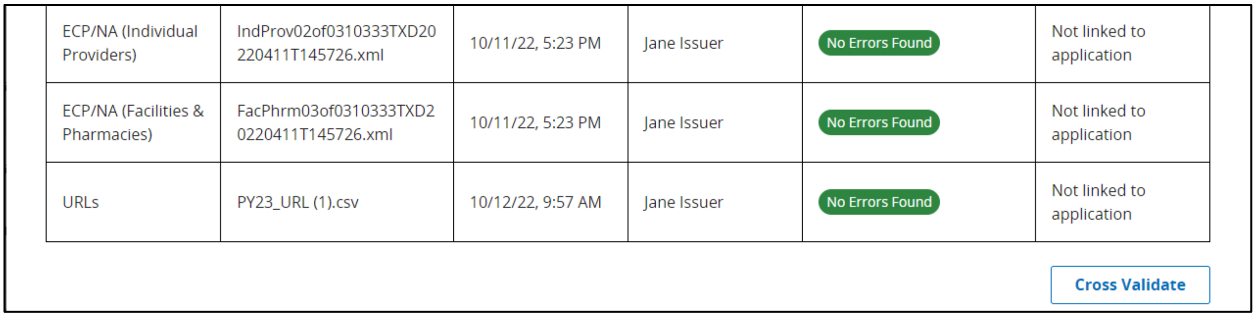
Figure 5-4. Validation Results

From this screen, the user may view the validation messages directly in the User Interface (UI) or choose to download the validation messages as a file.

5.3 Cross Validating Templates

After reviewing and addressing all validation results, the user may proceed with performing cross validation between templates by selecting the ‘Cross Validate’ button. *See Figure 5-5.*

Note: Only templates in a validation status of “No Errors Found” and/or “Warnings Found” can be cross validated.



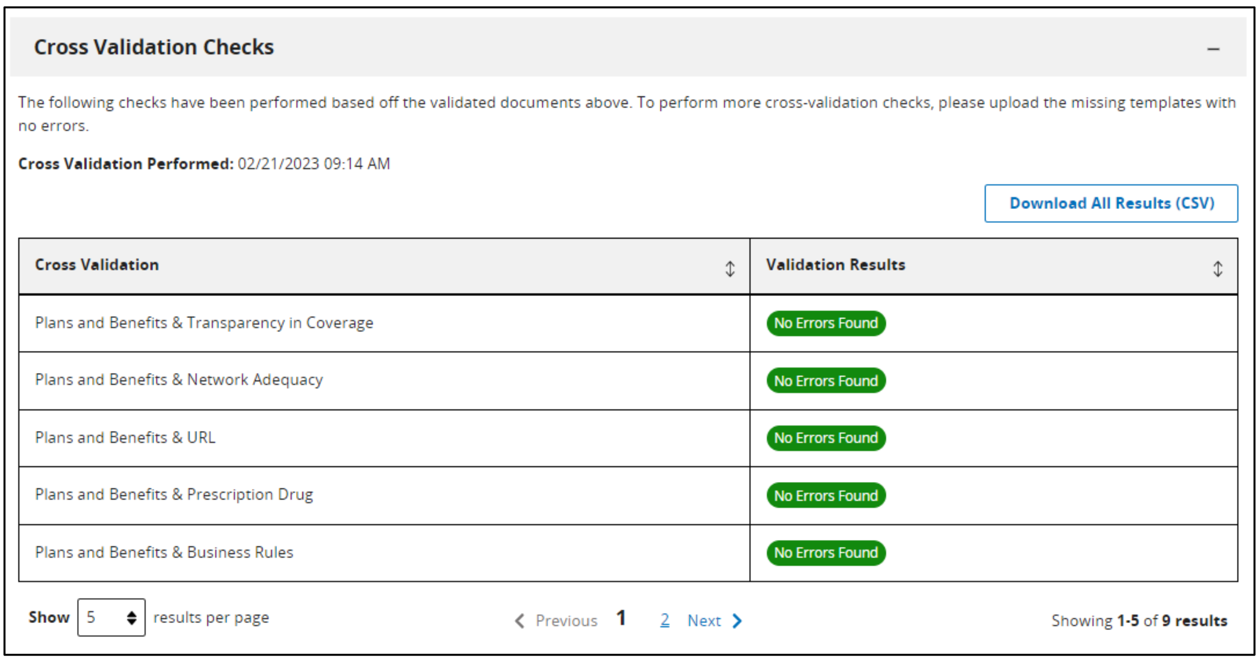
ECP/NA (Individual Providers)	IndProv02of0310333TXD20220411T145726.xml	10/11/22, 5:23 PM	Jane Issuer	No Errors Found	Not linked to application
ECP/NA (Facilities & Pharmacies)	FacPhrm03of0310333TXD20220411T145726.xml	10/11/22, 5:23 PM	Jane Issuer	No Errors Found	Not linked to application
URLs	PY23_URL (1).csv	10/12/22, 9:57 AM	Jane Issuer	No Errors Found	Not linked to application

Cross Validate

Figure 5-5. Cross Validate Templates

5.4 Viewing Cross Validation Results

Similar to the Validation Results section, cross validation results are displayed in a new section called Cross Validation Checks. *See Figure 5-6.*



Cross Validation Checks

The following checks have been performed based off the validated documents above. To perform more cross-validation checks, please upload the missing templates with no errors.

Cross Validation Performed: 02/21/2023 09:14 AM

Download All Results (CSV)

Cross Validation	Validation Results
Plans and Benefits & Transparency in Coverage	No Errors Found
Plans and Benefits & Network Adequacy	No Errors Found
Plans and Benefits & URL	No Errors Found
Plans and Benefits & Prescription Drug	No Errors Found
Plans and Benefits & Business Rules	No Errors Found

Show 5 results per page   Previous 1 2 Next   Showing 1-5 of 9 results

Figure 5-6. Cross Validation Results

Users may view validation warnings and errors similar to the Validation Results section.

6 Creating a New QHP Application

Instructions for creating a new QHP Application are detailed in the sections below.

6.1 Create a New QHP Application

After navigating to the QHP Applications section after validating all templates, the user can select a Plan Year, Issuer, Product Offering, and Market Coverage Type to create a new QHP

Application. *See Figure 6-1*. A user may only create one application per plan year per issuer, and an application may not be created for a State-based Exchange (SBE) state.

Note: For the Product Offering and Market Coverage Type fields, the user must select the option that reflects all product offerings (QHPs, SADPs, or Both) and markets (Individual, Small Group, or Both) they intend to submit data for as part of their QHP Application.

Figure 6-1. Start Application

When ready, the user selects the 'Create Application' button to create the new application.

6.2 Link Templates to Application

When a new application is created, a prompt appears allowing the user to select any valid templates XML (i.e., Template XML containing "No Errors Found") available in the Workspace they would like to link to the new QHP Application. *See Figure 6-2*. Only templates with a status of "No Errors Found" and/or "Warnings Found" can be linked to a QHP Application.

Note: *This prompt will not appear for applications created for State Partnership Exchange (SPE) or State-based Exchange on the Federal Platform (SBE-FP) states, as QHP templates in these states should be transferred from the System for Electronic Rate and Form Filing (SERFF).*

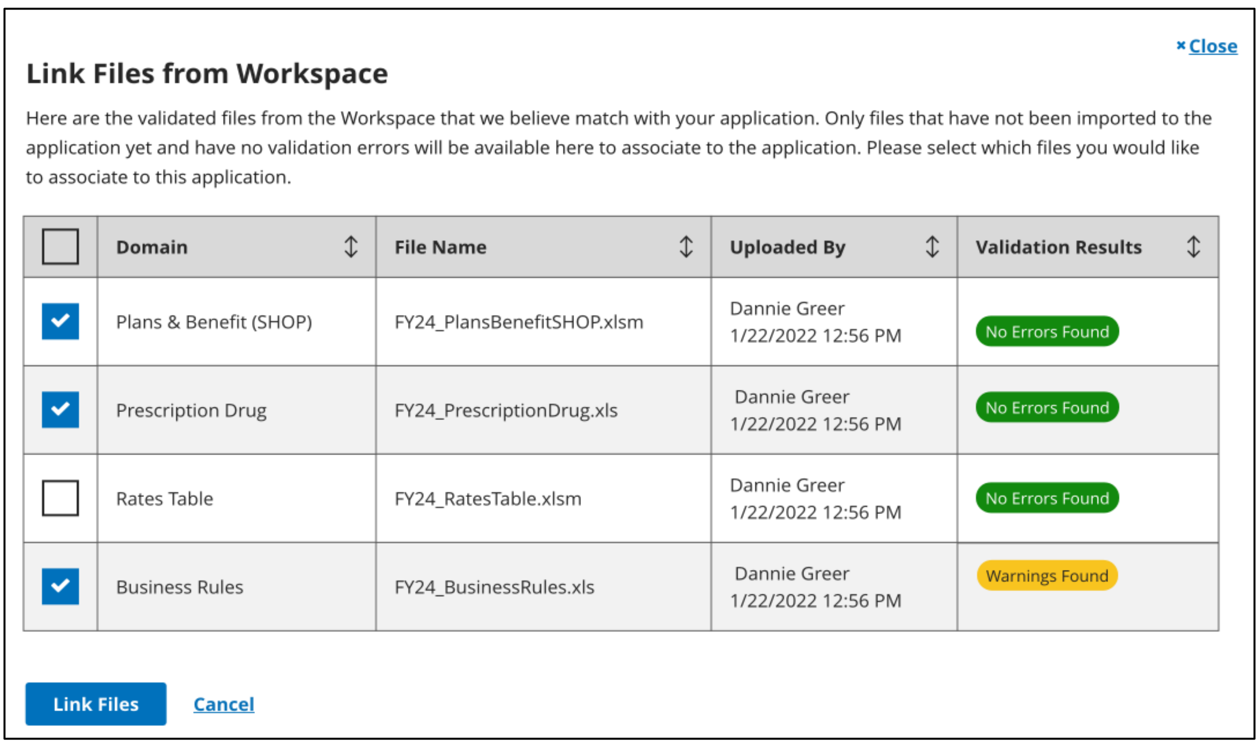


Figure 6-2. Link Chosen Files to Workspace

Once templates are selected, the user may select the 'Link Files' button to add the templates to the QHP Application.

Note: *Users may also choose to link templates from the Workspace to their application on the Application Summary page using the 'Link Files' button.*

6.3 Application Overview

Once the user links files to the application or chooses to close the prompt, they are directed to the Application Overview. Here the user is presented with a list of sections that they are required to complete as part of the QHP Application. The sections that are displayed are based on the Market Coverage Type, Product Offering, and Exchange Model for the applicable plan.

While users in FFE states will be able to access and complete each section of the application through MPMS, users of the SERFF system will only be able to edit certain sections/groups of the application. Those sections are Plan Business Rule, Plan Attributes, and Plan Rates. In these cases, MPMS is expecting to receive the template data and/or supporting documents through the SERFF Plan Transfer service, rather than making edits in MPMS.

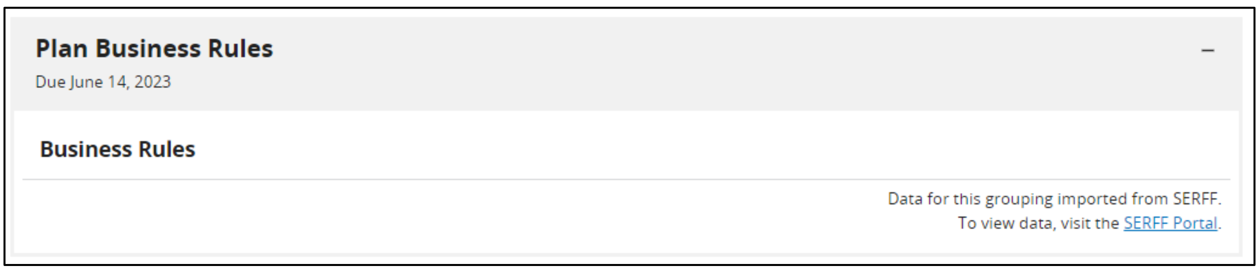


Figure 6-3. Data imported from SERFF

7 Common Actions within an Application

The QHP Application is divided into individual sections and grouped together so that they can be submitted to CMS for review and feedback. Instructions for completing each section of the QHP Application are detailed below.

7.1 Linking Templates from the Workspace

Users are not able to upload a template XML directly into the QHP Application, and instead must link valid templates XML from the Workspace to the application. Once a QHP Application is created, there are two ways the user may link a template XML from the Workspace to the application.

The first option is using the 'Link Files' button at the top of Application Overview. *See Figure 7-1.*

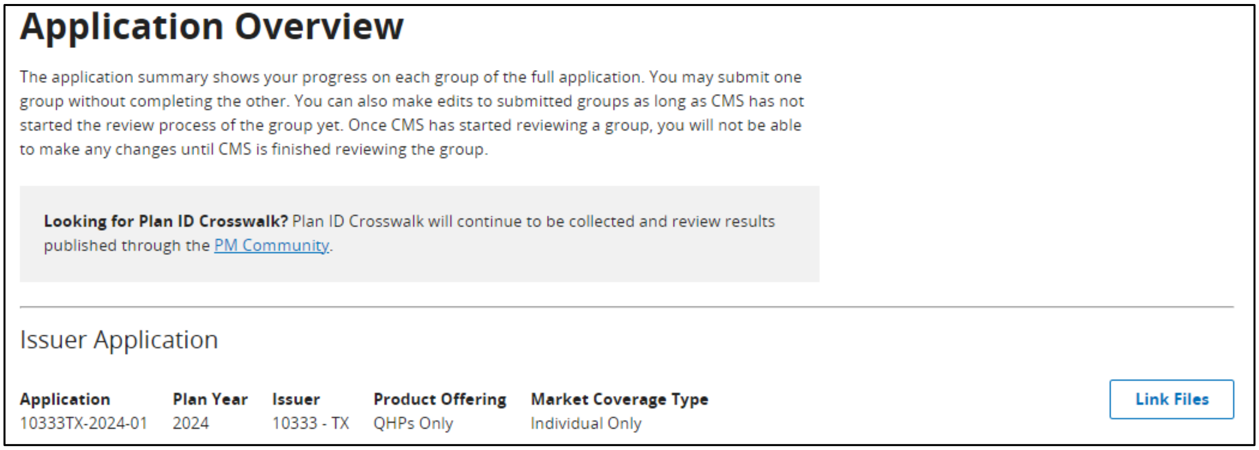


Figure 7-1. Link Files to Application

The second, and recommended option if a new template XML needs to be uploaded, allows the user to navigate directly to the Workspace from a section of the QHP Application, then link the new file. To do this, the user may select the ‘Open Workspace’ link found in an application section. *See Figure 7-2.*

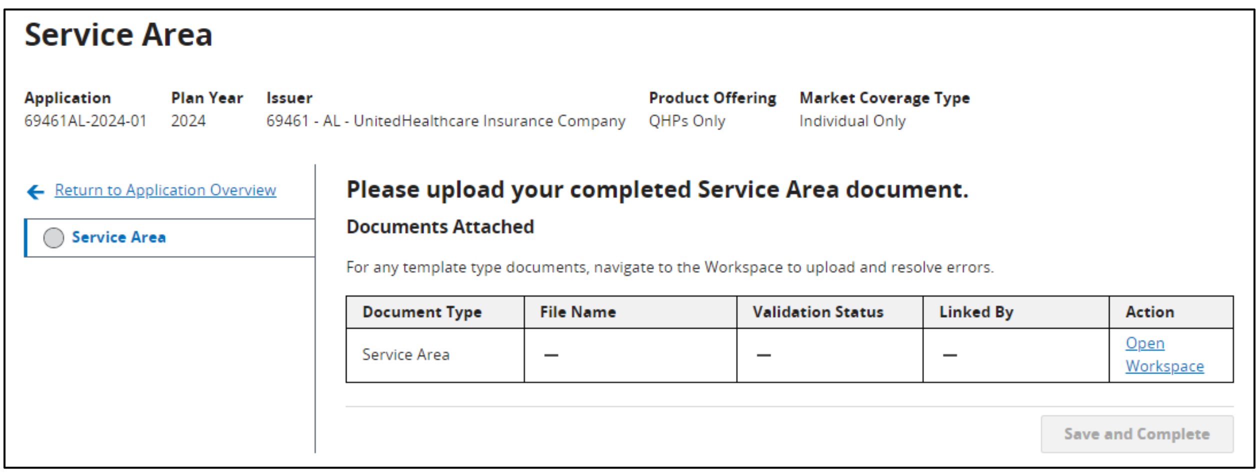


Figure 7-2. Open Workspace

Once in the Workspace, the user may upload the new template XML and view validation results as described in section 5. After a valid template XML is uploaded, the user may scroll to the bottom of the Workspace screen and select the ‘Link to Application’ button. *See Figure 7-3.*

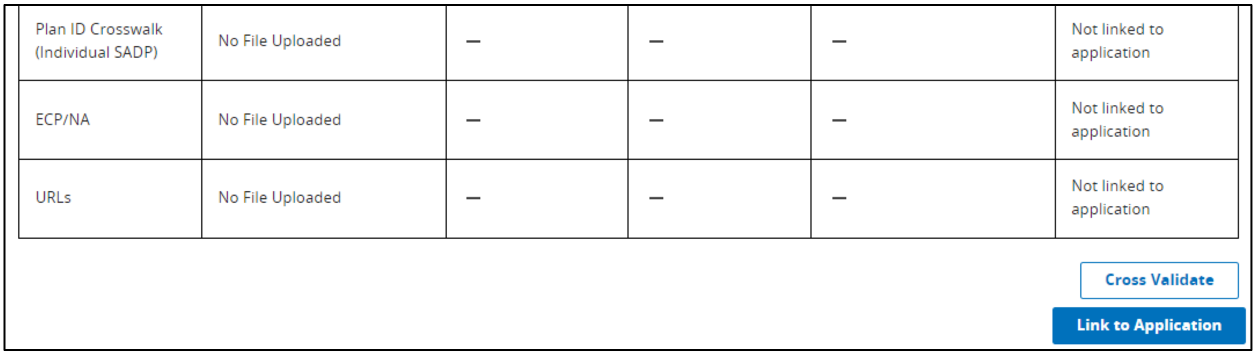


Figure 7-3. Link to Application

Selecting the 'Link to Application' button will prompt the user to select a valid template XML to link to the application. *See Figure 7-4.* The templates XML listed in the prompt are limited to the templates XML that apply to the section of the application the user navigated from.

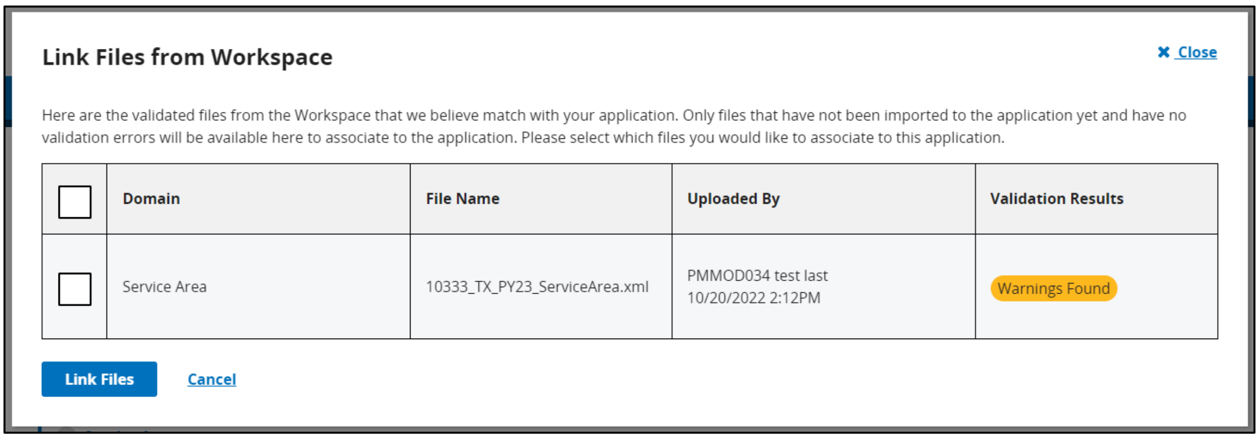


Figure 7-4. Link Files from Workspace

After selecting the 'Link Files' button, the user is redirected back to the section of the application, and the template XML is now successfully linked to the Application. *See Figure 7-5.*

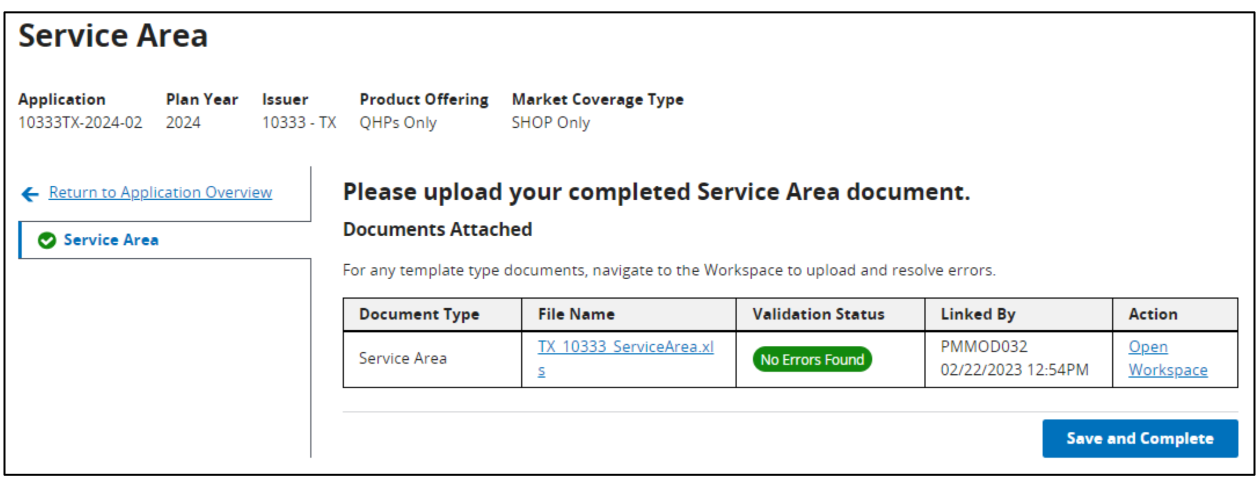


Figure 7-5. Templates Successfully Linked

7.2 Uploading Supporting Documentation

Supporting and Justification Documentation is needed when a warning is found in a template XML. The following details how to upload Supporting and Justification Documents.

To upload a Supporting and Justification Document, a user needs to select the 'Add document' button. In some cases, uploading multiple documents is required. To upload more than one document, select the 'Add document' button and individually add each document *See Figure 7-6.*

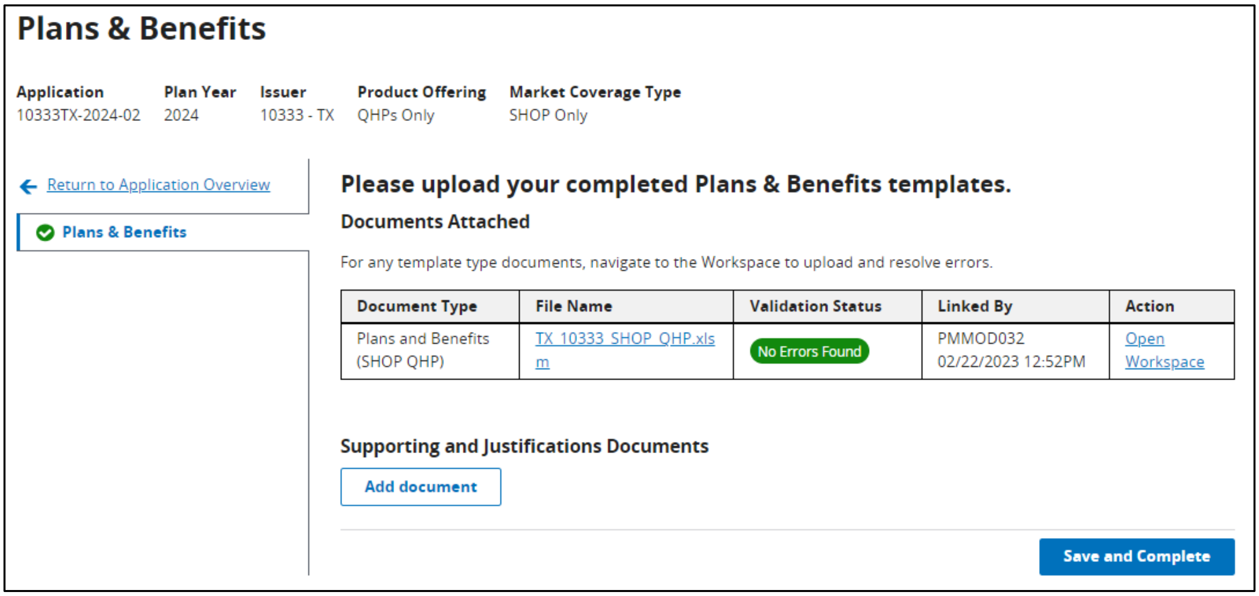


Figure 7-6. Supporting and Justifications Documents

Upload supporting documents by selecting a document type in the dropdown menu and then dragging or selecting the supporting and justification document from a local folder. *See Figure 7-7*. Note that each document type has a list of supported file types when uploading. After the file appears, selecting the 'Upload' button will upload the document to the domain.

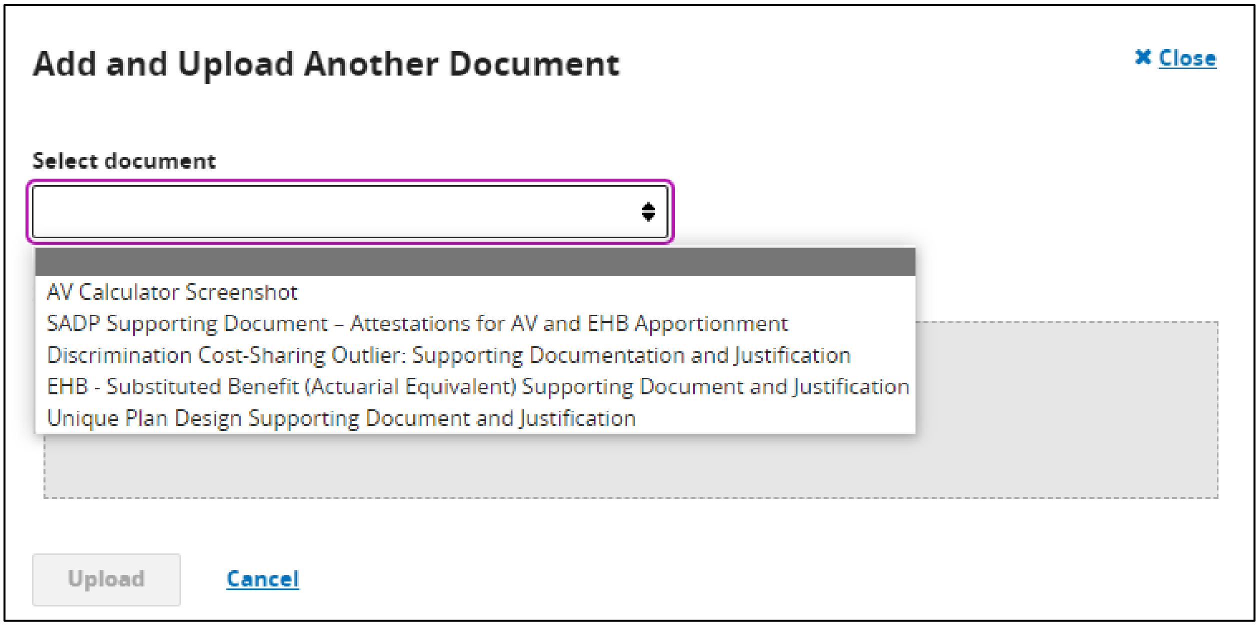


Figure 7-7. Add and Upload Supporting Documents

After the files are uploaded, they will appear in the domain. *See Figure 7-8.* A user may select the File Name link to download the supporting document or the 'Upload' action button to re-upload a file. Selecting the 'Save and Complete' button returns the user to Application Overview.

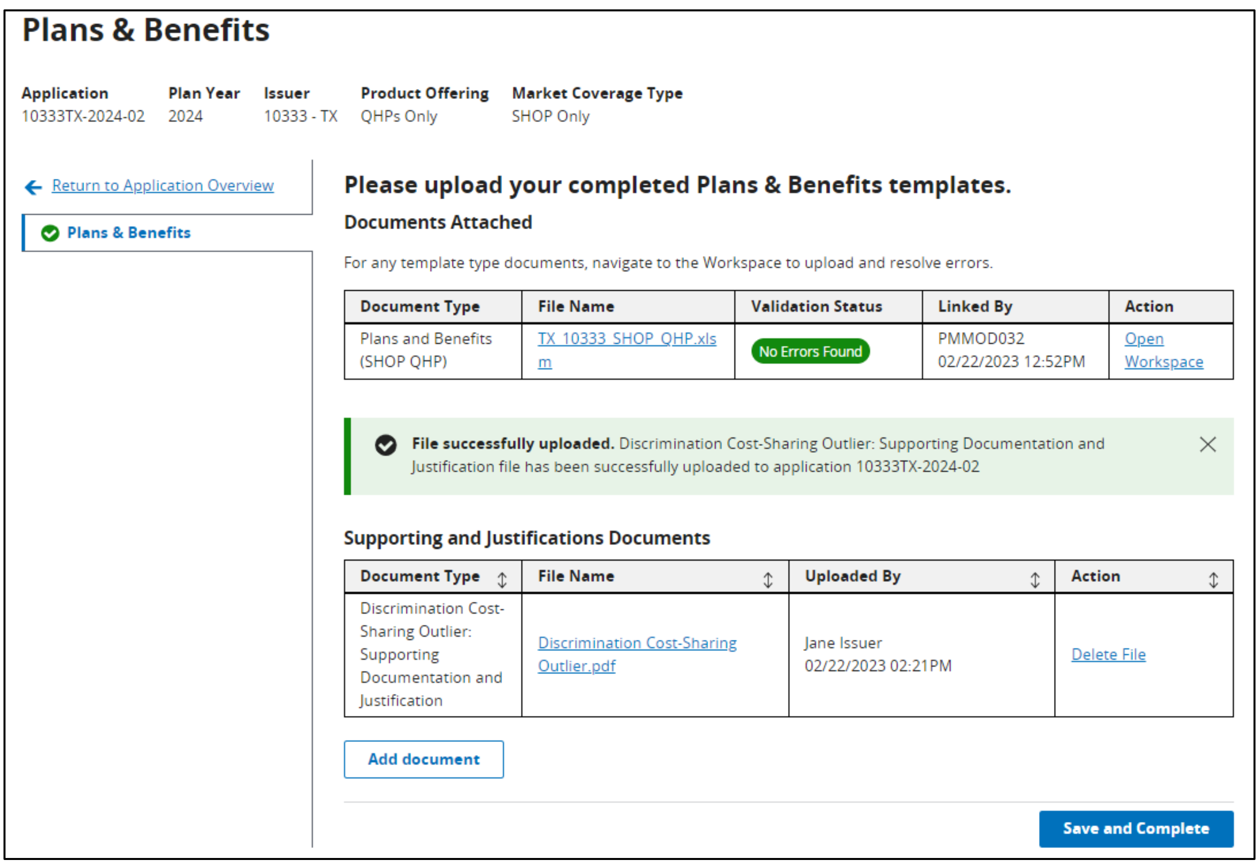
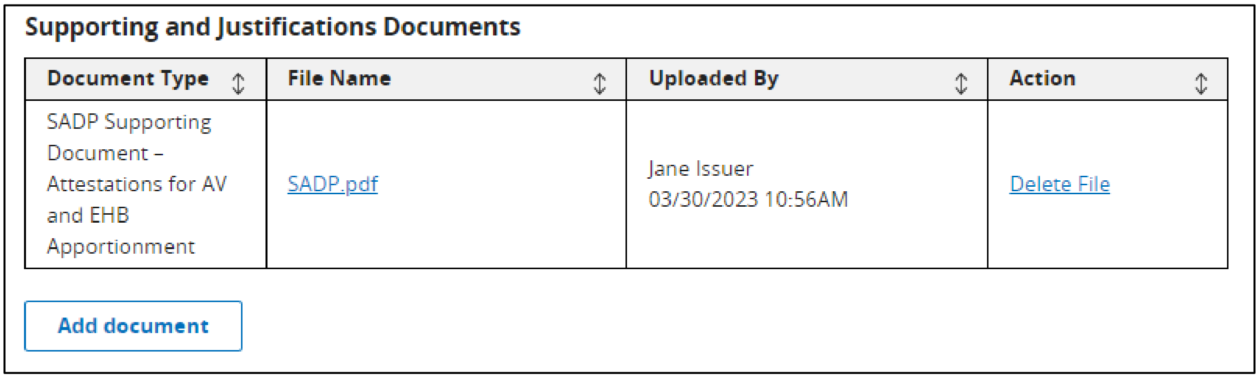


Figure 7-8. Uploaded Supporting Documents

7.3 Removing Supporting Documents

A user may remove a supporting document within a domain section of the QHP Application. Under Supporting and Justification Documents, a user may select the 'Delete Files' action to remove a previously uploaded file. See Figure 7-9.


Supporting and Justifications Documents

Document Type	File Name	Uploaded By	Action
SADP Supporting Document – Attestations for AV and EHB Apportionment	SADP.pdf	Jane Issuer 03/30/2023 10:56AM	Delete File

Add document

Figure 7-9. Delete Supporting File

Selecting this action displays a pop-up to the user asking if they wish to continue and delete the file. The user may select 'Yes, Delete File' to remove the previously uploaded file, or select 'No, Keep File' to keep the selected file or the 'Close' button to continue editing. If a file is deleted, the action cannot be undone.

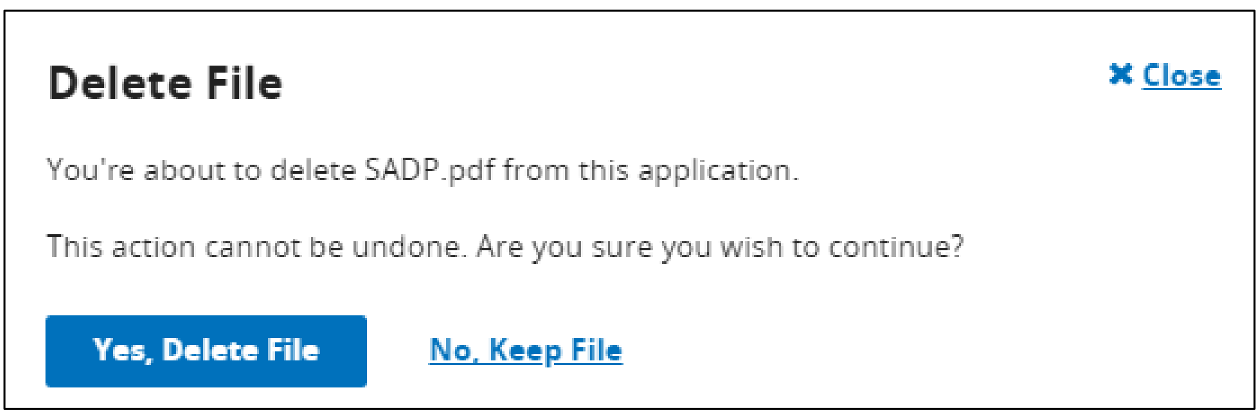


Figure 7-10. Delete File Pop-up

A user may also replace any supporting documents within a domain section. Under Supporting and Justification Documents a user may select the Replace a File action to replace a previously uploaded file. *See Figure 7-11*. This action displays a pop-up for the user to upload the file they wish to replace the previous file with.

Supporting and Justifications Documents

If you have warnings in your template, you must upload a justification document.

Document Type	File Name	Uploaded By	Action
Partial County Justification	SuppDocDiscrimination TreatmentProtocolPY23-Form-508.pdf	Jane Issuer 03/30/2023 11:27AM	Replace File
State Approval documentation	SuppDocDiscrimination TreatmentProtocolPY23-Form-508.pdf	Jane Issuer 03/30/2023 11:27AM	Replace File

Figure 7-11. Replace Supporting File

8 Completing Sections of an Application

Each section of the QHP Application may have dynamic requirements based on the type of QHP Application the user is completing. Details and instructions on these dynamic requirements are detailed in the sections below.

8.1 Administrative Section

The Administrative section is required for all QHP Applications and must be error free in order for the user to complete the section. The information displayed in the Administrative Section is retrieved from the HIOS Plan Finder, and any errors identified in a section must be resolved by making updates to the HIOS Plan Finder module.

Note: Updates made in the HIOS Plan Finder module may take up to an hour to be reflected in the Administrative section.

8.1.1 Completing the Administrative Section

The Administrative Section is divided into 3 sub-sections: Corporate & Billing Information, Customer Service Contact – Individual, and Customer Service Contact – SHOP. See Figure 8-1.

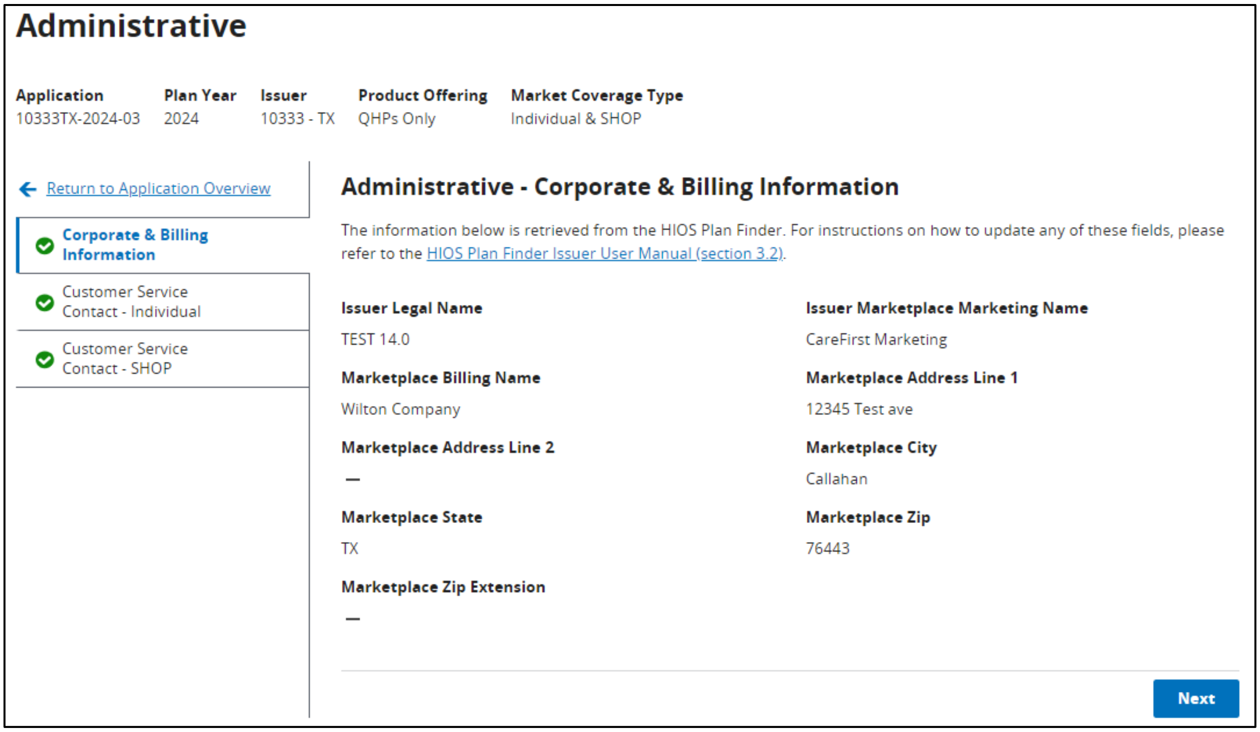


Figure 8-1. Administrative Section

Table 8-1 below provides the logic used to determine what Administrative Data displays to the user.

Table 8-1. Administrative Section Display Logic

Market Coverage Type	Administrative Data Displayed
Individual & SHOP	Corporate & Billing Information Customer Service Contact – Individual Customer Service Contact – SHOP
Individual	Corporate & Billing Information Customer Service Contact – Individual
SHOP	Corporate & Billing Information Customer Service Contact – SHOP

Table 8-2 below provides the mapping of fields in the HIOS Plan Finder to the Administrative Section.

Table 8-2. HIOS Plan Finder Fields

Administrative Section	Administrative Section Field Name	HIOS Plan Finder Section	HIOS Plan Finder Field Name
Corporate & Billing Information	Issuer Legal Name	Corporate Information	Issuer Legal Name
Corporate & Billing Information	Issuer Marketplace Marketing Name	Corporate Information	Issuer Marketplace Marketing Name

Administrative Section	Administrative Section Field Name	HIOS Plan Finder Section	HIOS Plan Finder Field Name
Corporate & Billing Information	Marketplace Billing Name	Marketplace Billing Information	Marketplace Billing Name
Corporate & Billing Information	Marketplace Address Line 1	Marketplace Billing Information	Marketplace Address Line 1
Corporate & Billing Information	Marketplace Address Line 2	Marketplace Billing Information	Marketplace Address Line 2
Corporate & Billing Information	Marketplace City	Marketplace Billing Information	Marketplace City
Corporate & Billing Information	Marketplace State	Marketplace Billing Information	Marketplace State
Corporate & Billing Information	Marketplace Zip	Marketplace Billing Information	Marketplace Zip
Corporate & Billing Information	Marketplace Zip Extension	Marketplace Billing Information	Marketplace Zip Extension
Customer Service Contact - Individual	Individual Customer Service Phone	Issuer Marketplace Information	IFP Customer Service Phone
Customer Service Contact - Individual	Individual Customer Service Phone Extension	Issuer Marketplace Information	IFP Customer Service Phone Extension
Customer Service Contact - Individual	Individual Customer Service Toll Free	Issuer Marketplace Information	IFP Customer Service Toll Free
Customer Service Contact - Individual	Individual Customer Service TTY	Issuer Marketplace Information	IFP Customer Service TTY
Customer Service Contact - Individual	Individual Customer Service URL	Issuer Marketplace Information	IFP Customer Service URL
Customer Service Contact - SHOP	SHOP Customer Service Phone	Issuer Marketplace Information	SHOP Customer Service Phone
Customer Service Contact - SHOP	SHOP Customer Service Phone Extension	Issuer Marketplace Information	SHOP Customer Service Phone Extension
Customer Service Contact - SHOP	SHOP Customer Service Toll Free	Issuer Marketplace Information	SHOP Customer Service Toll Free
Customer Service Contact - SHOP	SHOP Customer Service TTY	Issuer Marketplace Information	SHOP Customer Service TTY
Customer Service Contact - SHOP	SHOP Customer Service URL	Issuer Marketplace Information	SHOP Customer Service URL

Once all errors resolve in the HIOS Plan Finder, and reflect in the Administrative Section, the user may select the ‘Save and Complete’ button to complete the section.

8.2 Interoperability Section

The Interoperability Section is required for QHP Applications in FFE and SPE states when the Product Offering includes “QHP”, and the Market Coverage Type includes “Individual”. This section requires the user to respond to a series of questions, as well as link relevant justification documents to the application based on their answers. An introduction is provided for the user, as well as instructions for completing the section *See Figure 8-2.*

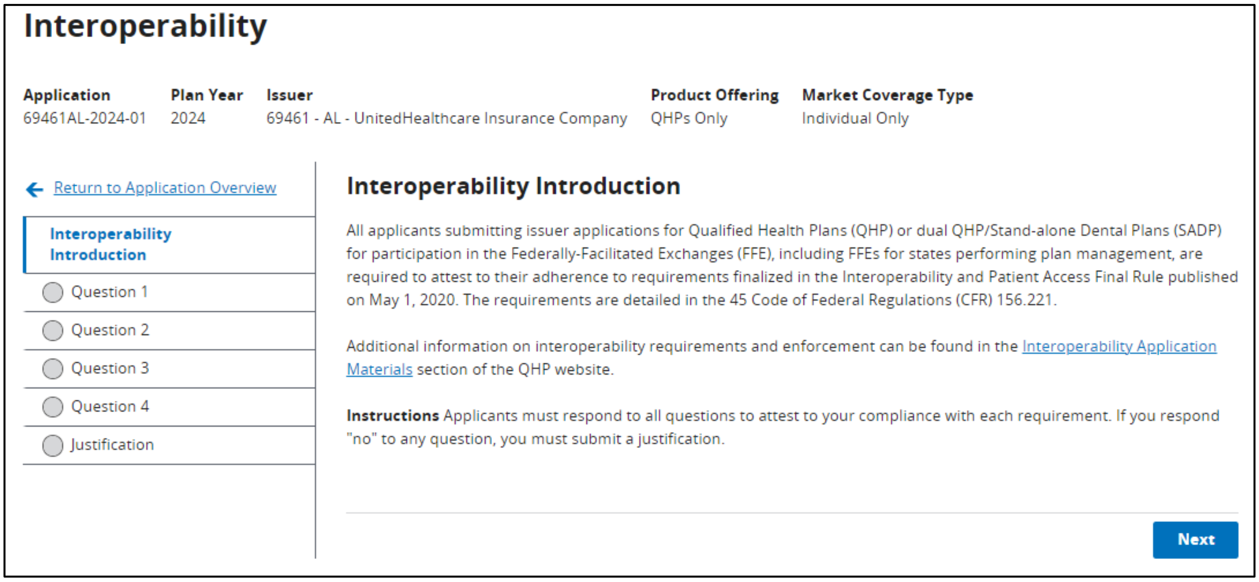


Figure 8-2. Interoperability Introduction

8.2.1 Responding to Interoperability Questions

Within each question, the user must respond ‘Yes’ or ‘No, I will submit justifications at the end of this section’, then select the ‘Save’ button to save the response or select the ‘Save and Next’ button to save and proceed to the next question. *See Figure 8-3.*

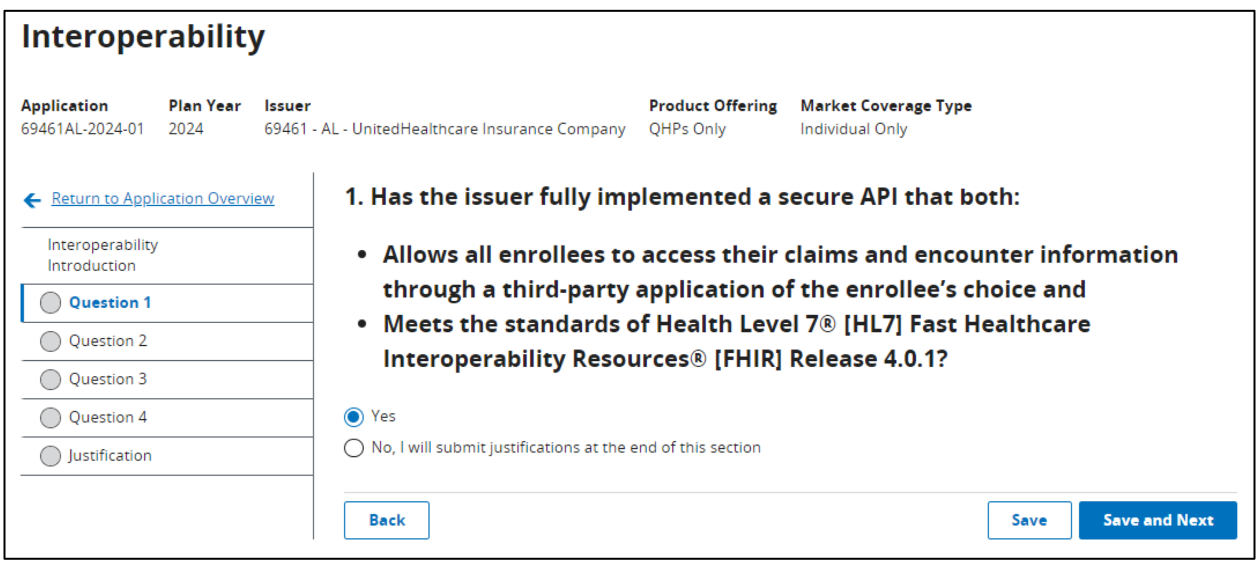


Figure 8-3. Interoperability Question 1

If a user answers “Yes” to questions 3 or 4, they are required to provide an active URL to demonstrate compliance with the question; a second URL is optional. A submitted URL must start with http:// or https://. Upon responding to the question or providing a URL, the user may select the ‘Save’ button to save their response or the ‘Save and Next’ button to proceed to the next question. *See Figure 8-4.*

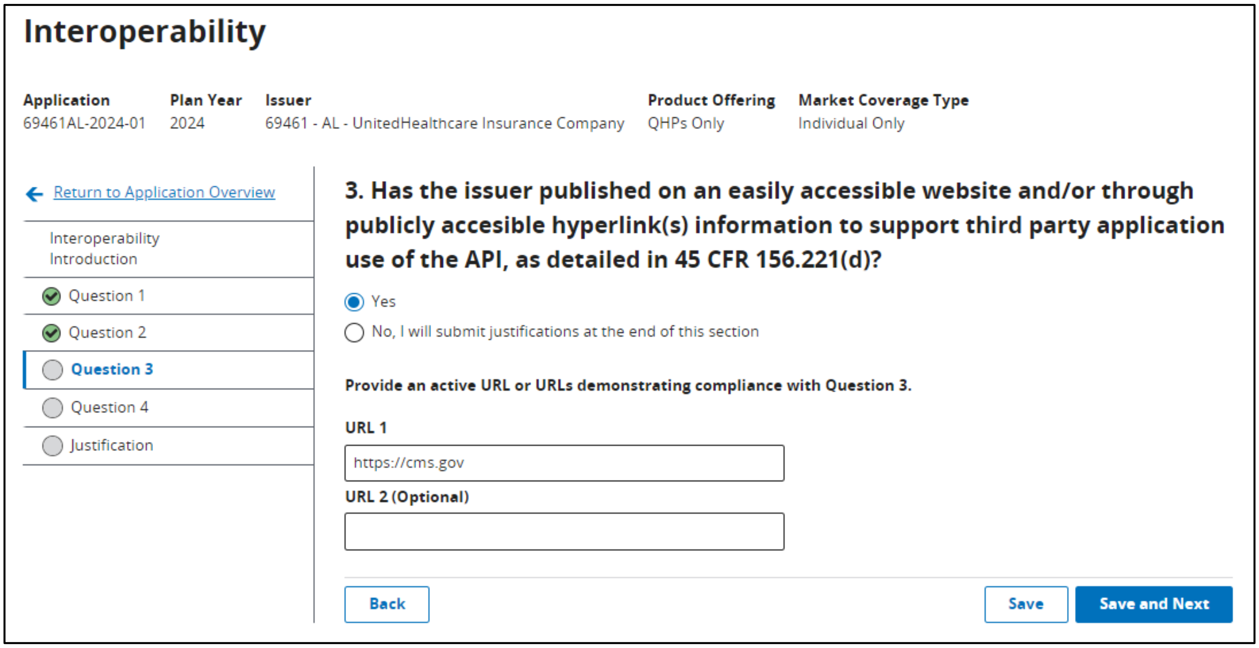


Figure 8-4. Interoperability Question 3

If the user provides a URL that has errors, an Interoperability Validation Results pop-up window will appear with detailed results. *See Figure 8-5.* Any invalid characters and missing URL format errors will appear inline in red with the text box.

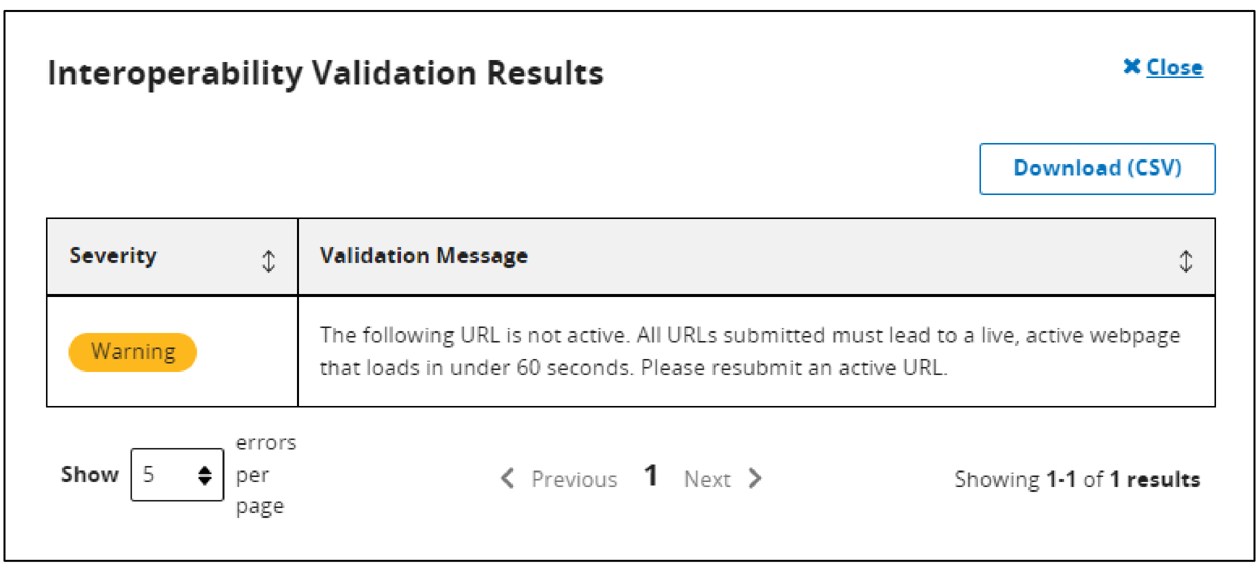


Figure 8-5. Interoperability Errors

8.2.2 Submitting an Interoperability Justification

If a user answers “No” to any of the interoperability questions, they are required to upload a justification document that contains information detailed in the section. *See Figure 8-6.*

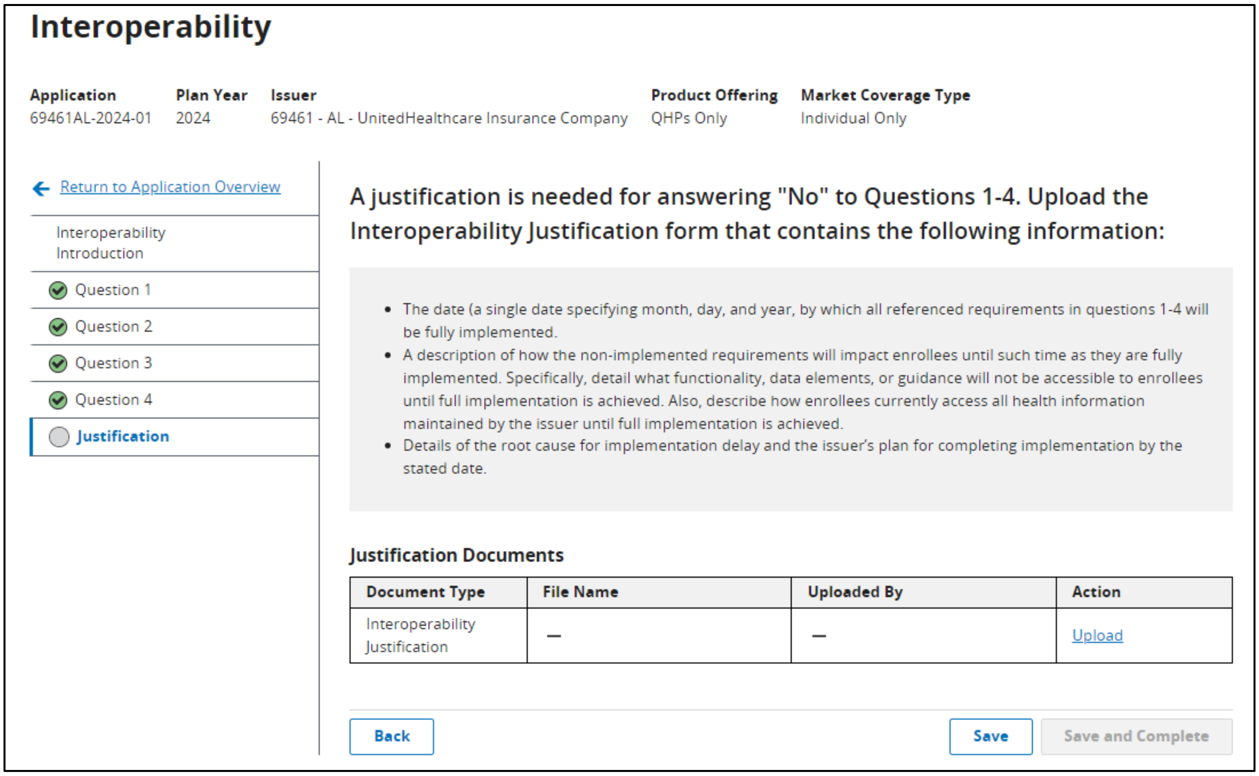


Figure 8-6. Interoperability Justification Documents

If a user answers "Yes" to all four questions, they are not required to upload a justification document. *See Figure 8-7.*

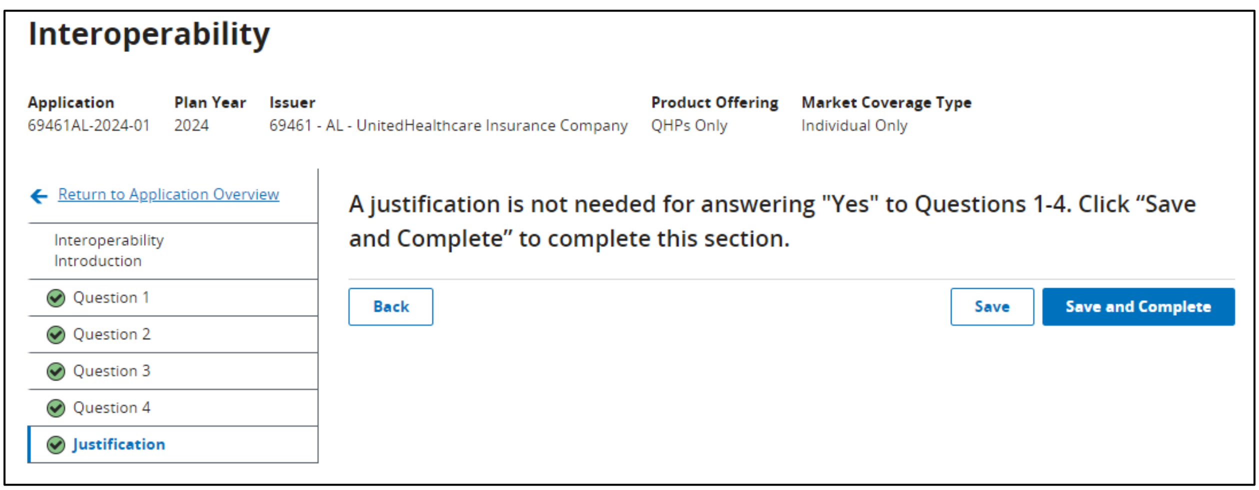


Figure 8-7. Interoperability Justification Documents Are Not Required

Once all questions have been responded to and any Justification Documents have been uploaded, the user may select the 'Save and Complete' button, redirecting the user to Application Overview, and the Interoperability Section displays as Completed.

8.3 Program Attestations Section

The Program Attestations section is required for all QHP Applications, and dynamically adjusts based on the Product Offerings of the application being submitted.

Note: This section will not display for SERFF issuers.

8.3.1 Responding to Program Attestations

Table 8-3 below provides the logic used to determine what Program Attestations display to the user based on the Product Offering.

Table 8-3. Program Attestation Display Logic

Product Offering	Attestations Displayed
QHP & SADP	QHP & SADP Attestation QHP Attestation SADP Attestation
QHP	QHP & SADP Attestation QHP Attestation
SADP	QHP & SADP Attestation SADP Attestation

Within the Attestation sections, the user must agree to the statement listed by selecting the check box. *See Figure 8-8.* Selecting the 'Save and Complete' button returns the user to Application Overview.

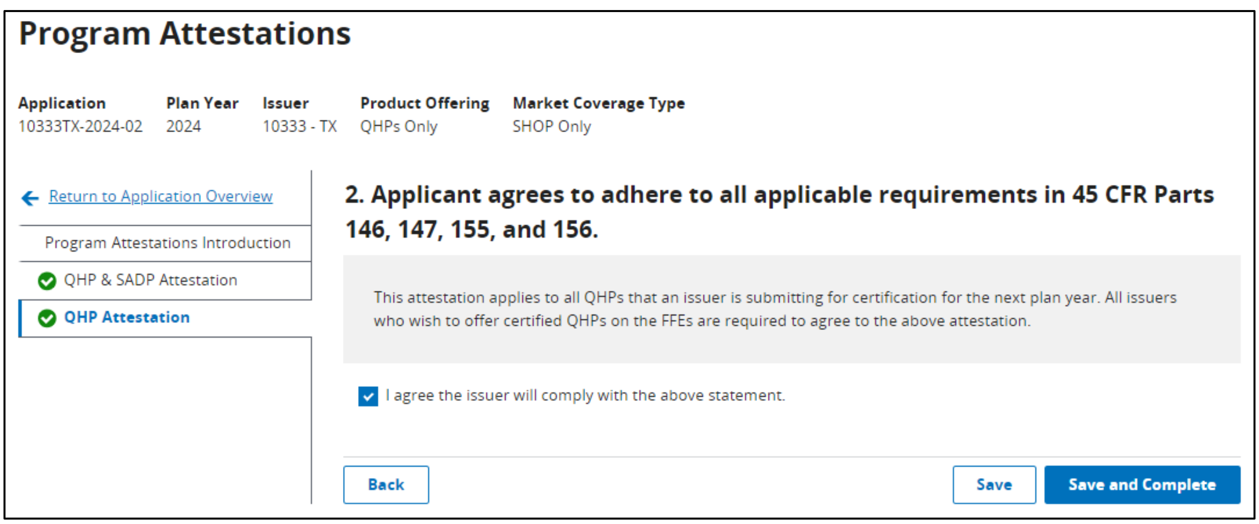


Figure 8-8. QHP Attestation

8.4 Business Rules Section

The Business Rules Section is required as part of all QHP Applications, and only requires a Business Rules template XLS to be linked. *See Figure 8-9.*

Note: This section and group will not be editable for SERFF issuers.

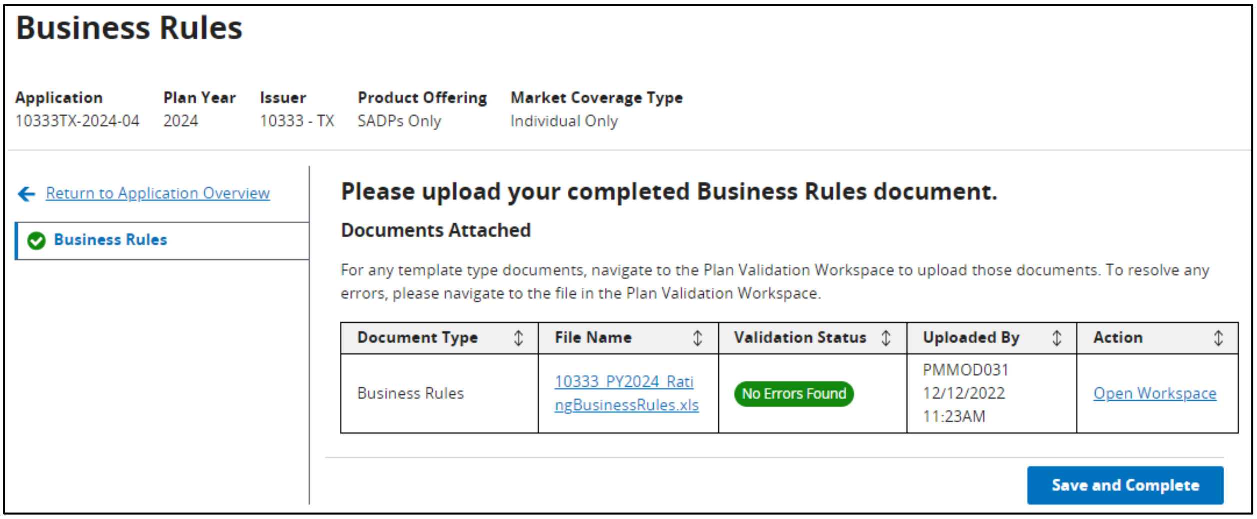


Figure 8-9. Business Rules Section

8.5 Essential Community Providers/Network Adequacy Section

The Essential Community Providers/Network Adequacy (ECP/NA) Section is required as part of all QHP Applications, and requires the user to respond to attestations, as well as link relevant QHP templates XML to the application. An introduction is provided for the user, as well as instructions for completing the section. *See Figure 8-10.*

Note: This section will not be editable by SERFF issuers.

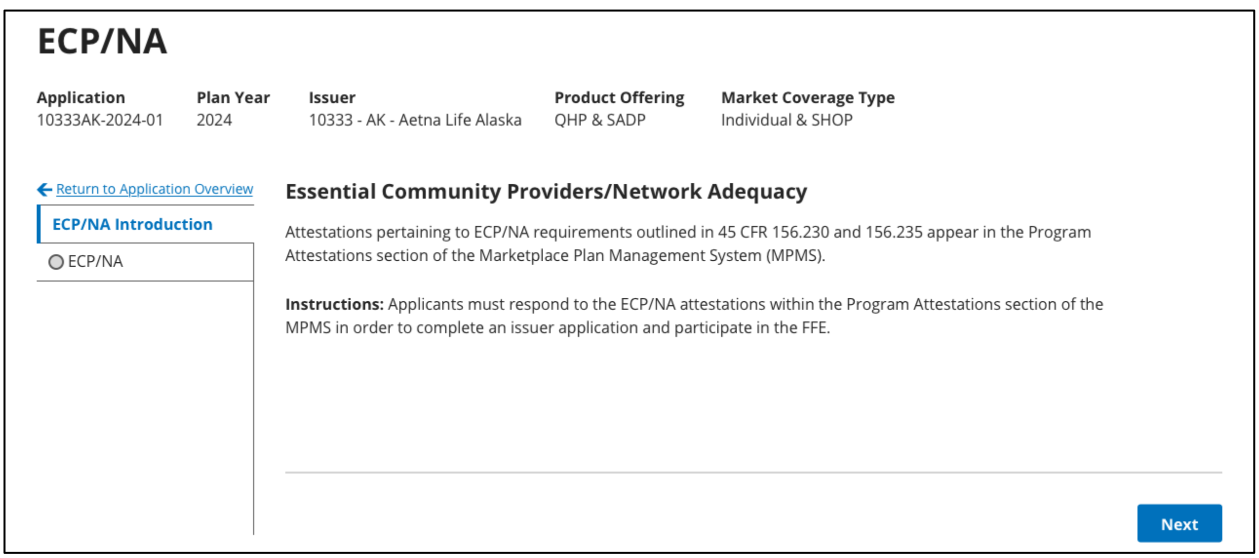


Figure 8-10. ECP/NA Introduction

Upon selecting the 'Next' button, the user is directed to the ECP/NA tab. *See Figure 8-11.* The user may select the drop-down instructions for additional information. The user may link required templates XML and upload additional documents in this section. Selecting the 'Save and Complete' button redirects the user to Application Overview, and the ECP/NA Section displays as Completed.

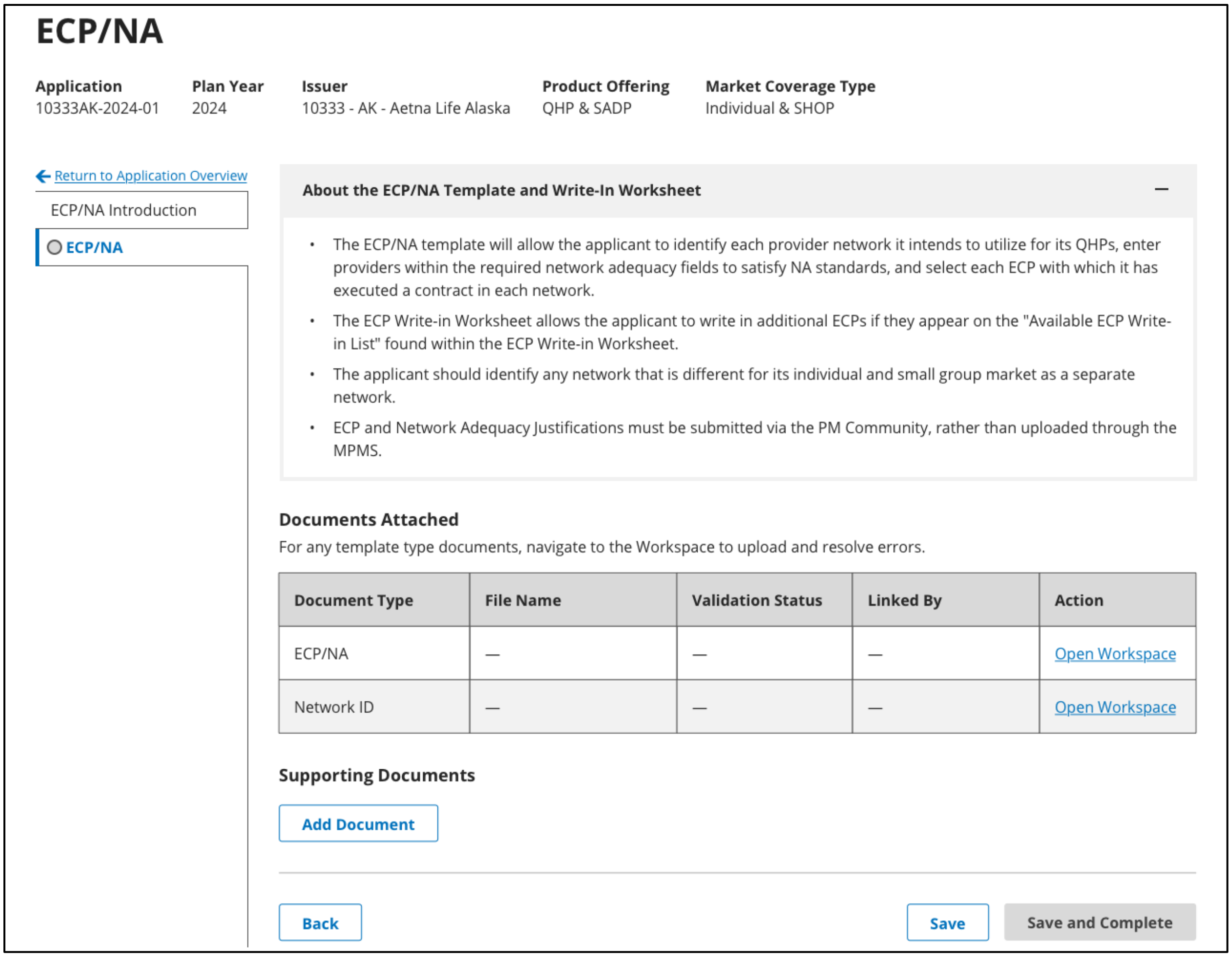


Figure 8-11. ECP/NA Documents

8.6 Plans and Benefits Section

The Plans and Benefits Section is required for all QHP Applications, and dynamically adjusts based on the type of application being submitted and whether the Plans and Benefits templates XML linked to the application require supporting documentation.

Note: This section will not be editable by SERFF issuers.

8.6.1 Linking Plans and Benefits Templates

The list of Plans and Benefits templates listed in the Documents Attached section are dynamically adjusted based on the Product Offering and Market Coverage Type of the application. See Figure 8-12.

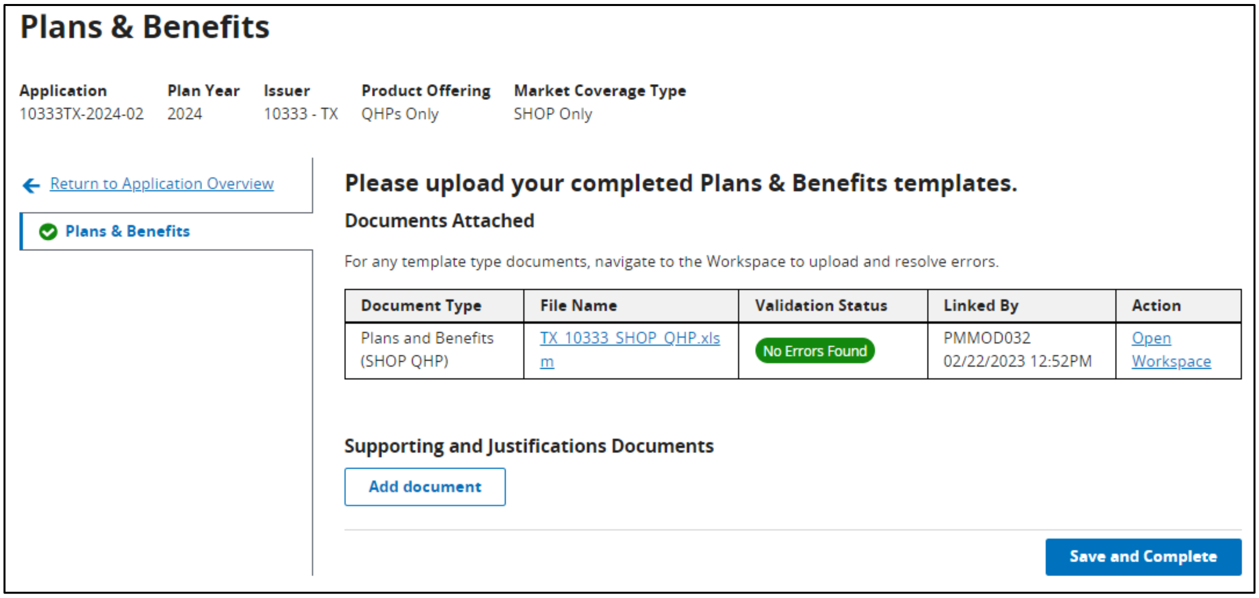


Figure 8-12. Plans and Benefits Templates

Table 8-4 below provides the logic used to determine what Plans and Benefits templates are displayed to the user.

Table 8-4. Plans and Benefit Template Display Logic

Product Offering	Market Coverage Type	Templates Displayed
QHP & SADP	Individual & SHOP	Plans & Benefits (Individual QHP) Plans & Benefits (Individual SADP) Plans & Benefits (SHOP QHP) Plans & Benefits (SHOP SADP)
QHP & SADP	Individual	Plans & Benefits (Individual QHP) Plans & Benefits (Individual SADP)
QHP & SADP	SHOP	Plans & Benefits (SHOP QHP) Plans & Benefits (SHOP SADP)
QHP	Individual & SHOP	Plans & Benefits (Individual QHP) Plans & Benefits (SHOP QHP)
QHP	Individual	Plans & Benefits (Individual QHP)
QHP	SHOP	Plans & Benefits (SHOP QHP)
SADP	Individual & SHOP	Plans & Benefits (Individual SADP) Plans & Benefits (SHOP SADP)
SADP	Individual	Plans & Benefits (Individual SADP)
SADP	SHOP	Plans & Benefits (SHOP SADP)

8.6.2 Adding Supporting Documentation

The list of supporting documents the user may select from are also dynamically adjusted based on the Product Offering and Market Coverage Type of the application. *See Figure 8-13*.

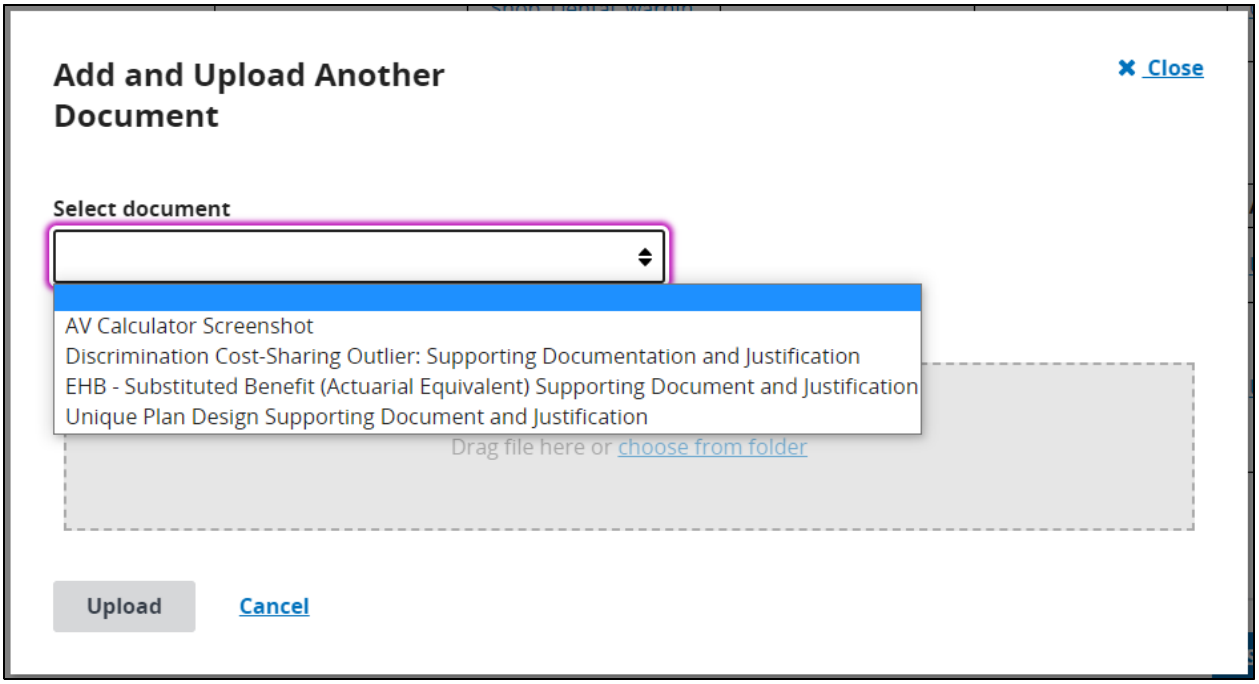


Figure 8-13. Plans and Benefits Supporting Documents

Table 8-5 below provides the logic used to determine what Supporting Document types are displayed to the user.

Table 8-5. Plans and Benefits Supporting Documentation Display Logic

Product Offering	Market Coverage Type	Supporting Documents Displayed
QHP & SADP	Individual & SHOP	• AV Calculator Screenshot • Discrimination Cost Sharing Outlier: Supporting Documentation and Justification • EHB – Substituted Benefit (Actuarial Equivalent) Supporting Document and Justification • Unique Plan Design Supporting Document and Justification • SADP Supporting Document – Attestations for AV and EHB Apportionment
QHP & SADP	Individual	• AV Calculator Screenshot • Discrimination Cost Sharing Outlier: Supporting Documentation and Justification • EHB – Substituted Benefit (Actuarial Equivalent) Supporting Document and Justification • Unique Plan Design Supporting Document and Justification • SADP Supporting Document – Attestations for AV and EHB Apportionment

Product Offering	Market Coverage Type	Supporting Documents Displayed
QHP & SADP	SHOP	• AV Calculator Screenshot • Discrimination Cost Sharing Outlier: Supporting Documentation and Justification • EHB – Substituted Benefit (Actuarial Equivalent) Supporting Document and Justification • SADP Supporting Document – Attestations for AV and EHB Apportionment
QHP	Individual & SHOP	• AV Calculator Screenshot • Discrimination Cost Sharing Outlier: Supporting Documentation and Justification • EHB – Substituted Benefit (Actuarial Equivalent) Supporting Document and Justification
QHP	Individual	• AV Calculator Screenshot • Discrimination Cost Sharing Outlier: Supporting Documentation and Justification • EHB – Substituted Benefit (Actuarial Equivalent) Supporting Document and Justification
QHP	SHOP	• AV Calculator Screenshot • Discrimination Cost Sharing Outlier: Supporting Documentation and Justification • EHB – Substituted Benefit (Actuarial Equivalent) Supporting Document and Justification
SADP	Individual & SHOP	• SADP Supporting Document – Attestations for AV and EHB Apportionment
SADP	Individual	• SADP Supporting Document – Attestations for AV and EHB Apportionment
SADP	SHOP	• SADP Supporting Document – Attestations for AV and EHB Apportionment

Any supporting documents required based on the Warnings found in the Plans and Benefits templates linked to the application are automatically displayed in the Supporting and Justifications Documents table. *See Figure 8-14.*

Supporting and Justifications Documents

Document Type	File Name	Uploaded By	Action
SADP Supporting Document – Attestations for AV and EHB Apportionment	SADP.pdf	Jane Issuer 03/30/2023 11:08AM	Delete File
EHB - Substituted Benefit (Actuarial Equivalent) Supporting Document and Justification	EHB.pdf	Jane Issuer 03/30/2023 11:10AM	Delete File
AV Calculator Screenshot	AV Calculator.pdf	Jane Issuer 03/30/2023 11:10AM	Delete File
Unique Plan Design Supporting Document and Justification	Unique Plan Design.pdf	Jane Issuer 03/30/2023 11:11AM	Delete File

Add document

Figure 8-14. Select Supporting Documents

8.6.3 Complete Plans and Benefits Section

Once all required templates XML and supporting documentation have been uploaded, the user may select the ‘Save and Complete’ button. *See Figure 8-15.*

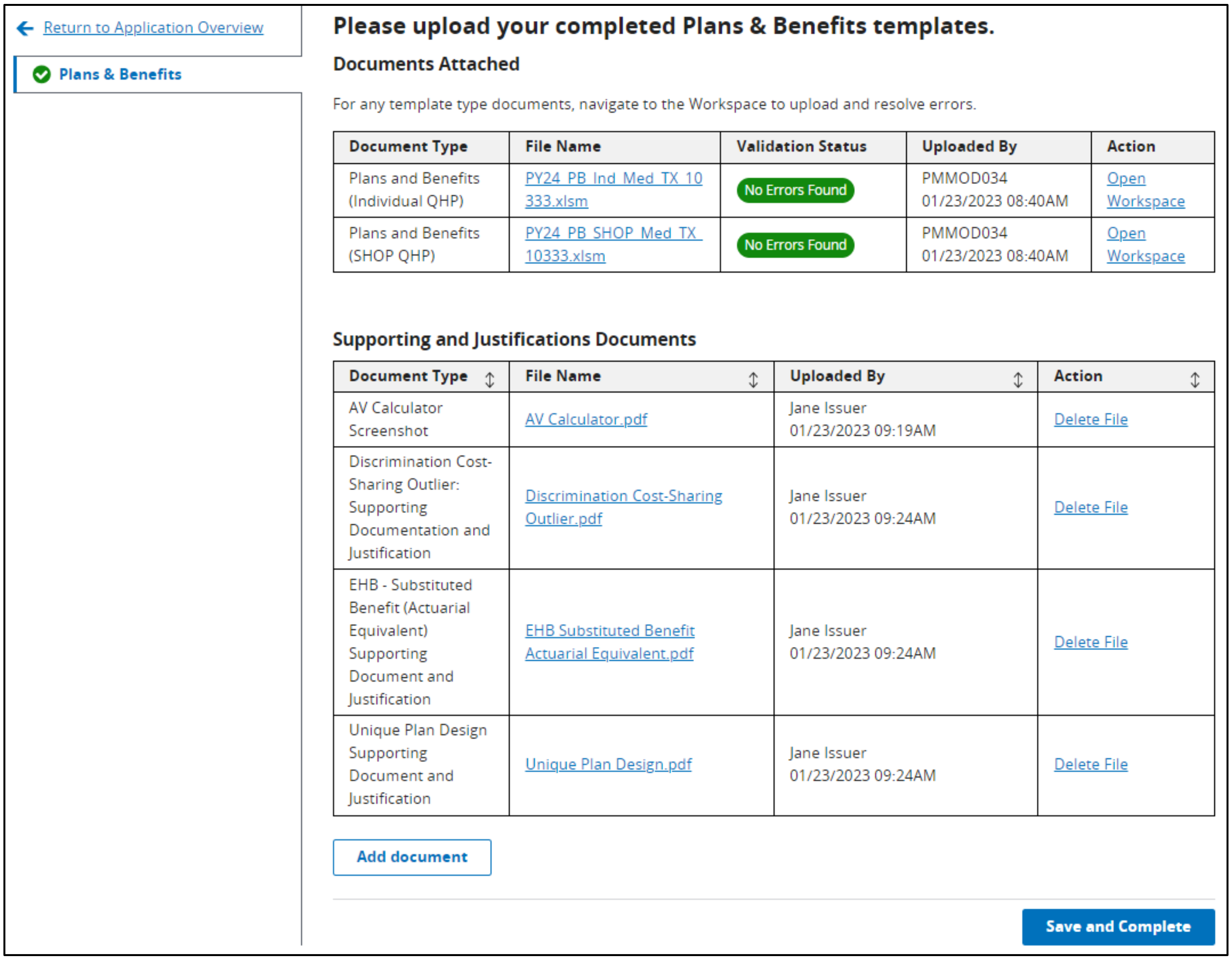


Figure 8-15. Save and Complete Plans and Benefits Section

After selecting the 'Save and Complete' button, the user is redirected to Application Overview, and the Plans and Benefits Section displays as Completed.

8.7 Prescription Drug Section

The Prescription Drugs Section is required for QHP Applications with a Product Offering that includes "QHP", and dynamically displays the Supporting and Justification Documents section as required based on the status of the Prescription Drug template XML. Once the required supporting documents are uploaded, the user may select the 'Save and Complete' button. *See Figure 8-16.*

Note: This section will not be editable by SERFF issuers.

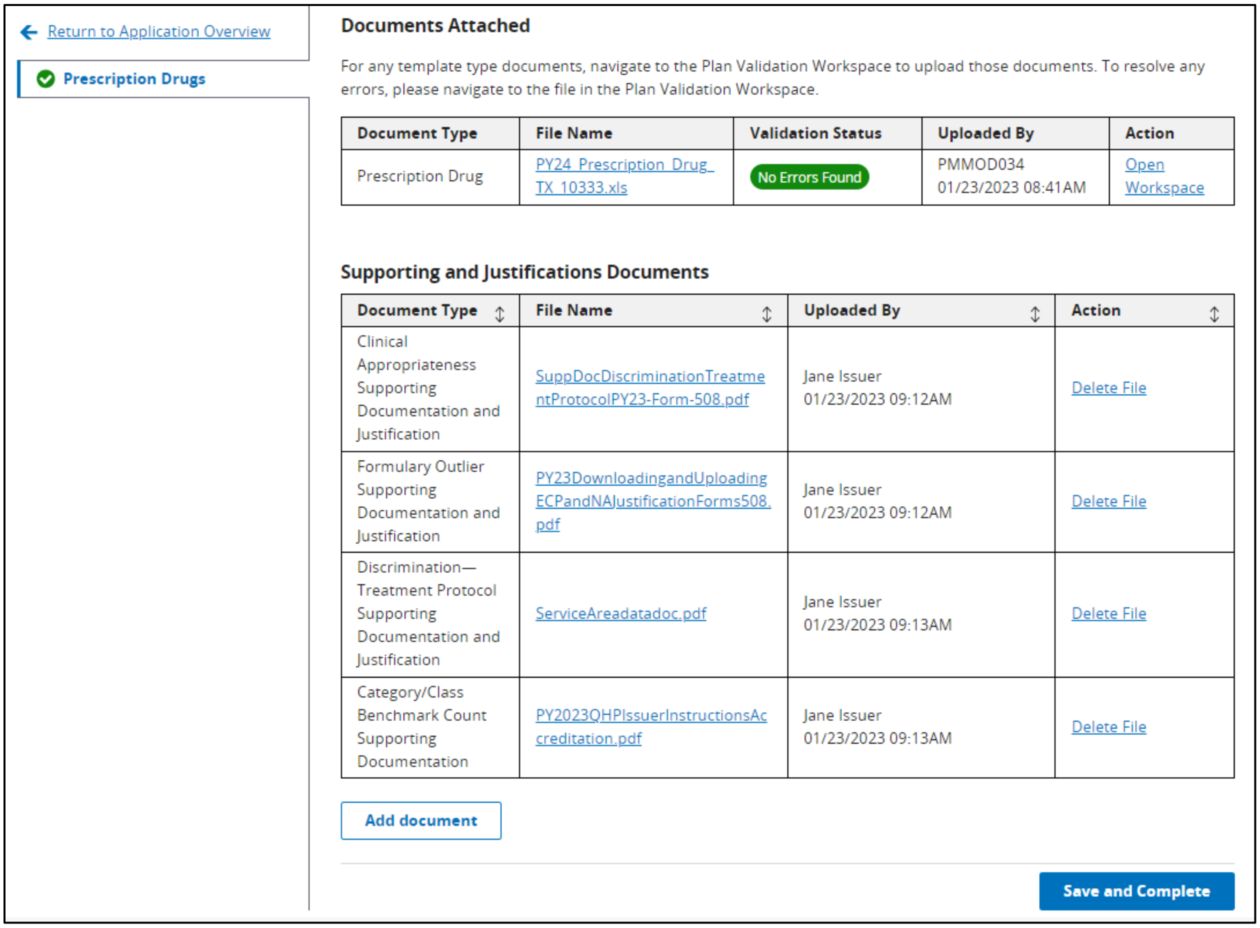


Figure 8-16. Save and Complete Prescription Drugs Section

After selecting the ‘Save and Complete’ button, the user is redirected to Application Overview and the Prescription Drugs section displays as Completed.

8.8 Service Area Section

The Service Area Section is required for all QHP Applications and dynamically displays the Supporting and Justification Documents section as required based on the status of the Service Area template XML. Supporting and Justification Documents may not be required. *See Figure 8-17.*

Note: This section will not be editable by SERFF issuers.

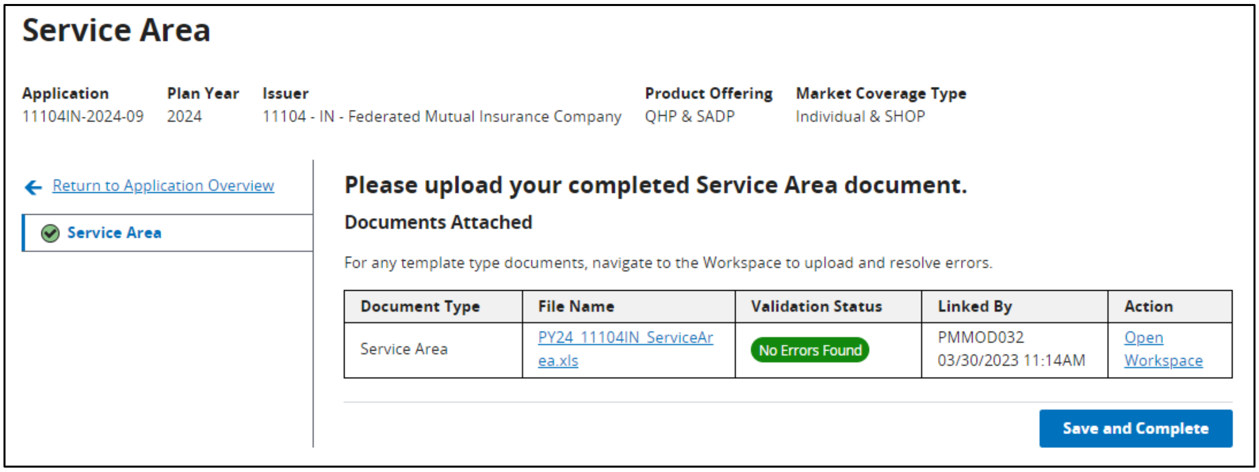


Figure 8-17. Service Area Section Page

Once any required supporting documents are uploaded, the user may select the 'Save and Complete' button. *See Figure 8-18.*

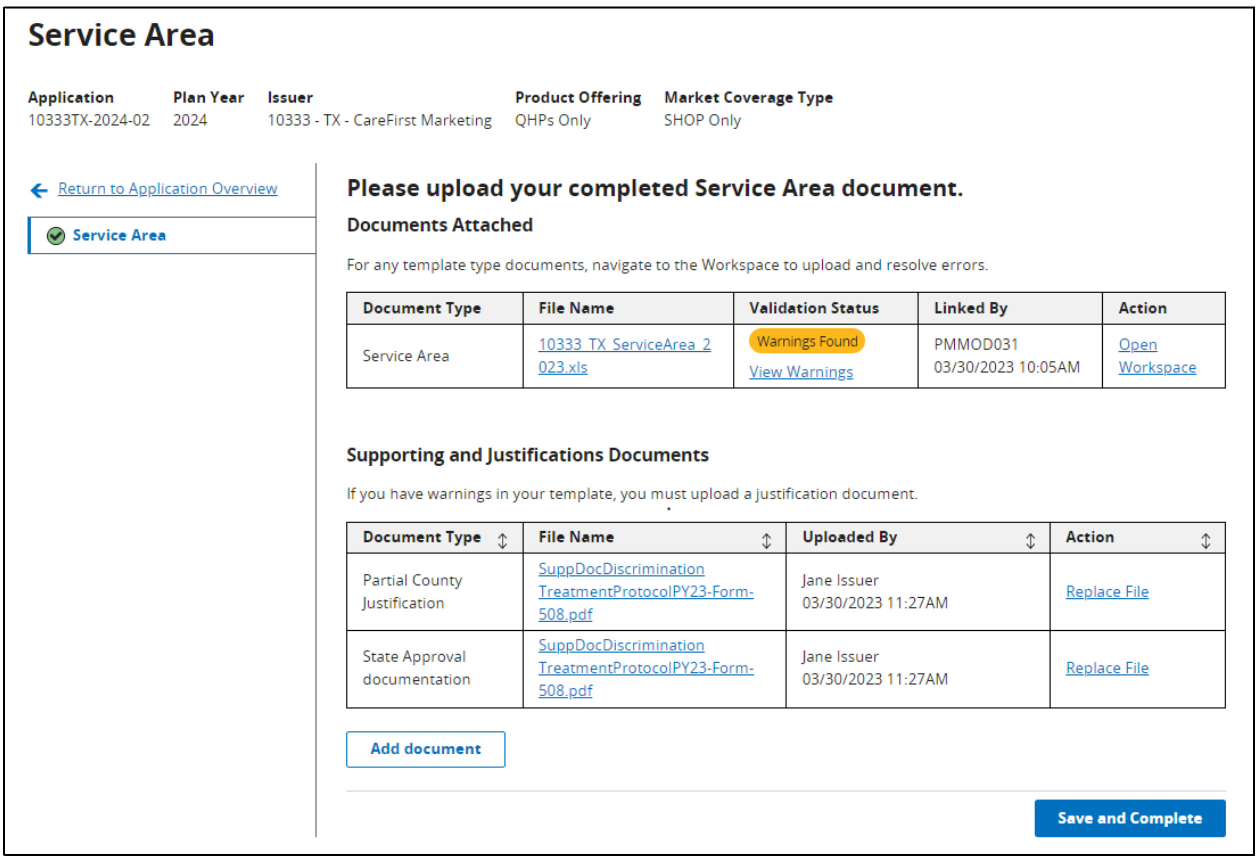


Figure 8-18. Save and Complete Service Area Section

After selecting the 'Save and Complete' button, the user will be redirected to Application Overview, and the Service Area section displays as Completed.

8.9 Accreditation Section

The Accreditation section is required for QHP Applications with a Product Offering that includes "QHP" and behaves the same across all application types.

Note: This section will not display for SERFF issuers.

8.9.1 Responding to Question 1

The user is required to indicate whether they are accredited by an HHS recognized accrediting entity. *See Figure 8-19.*

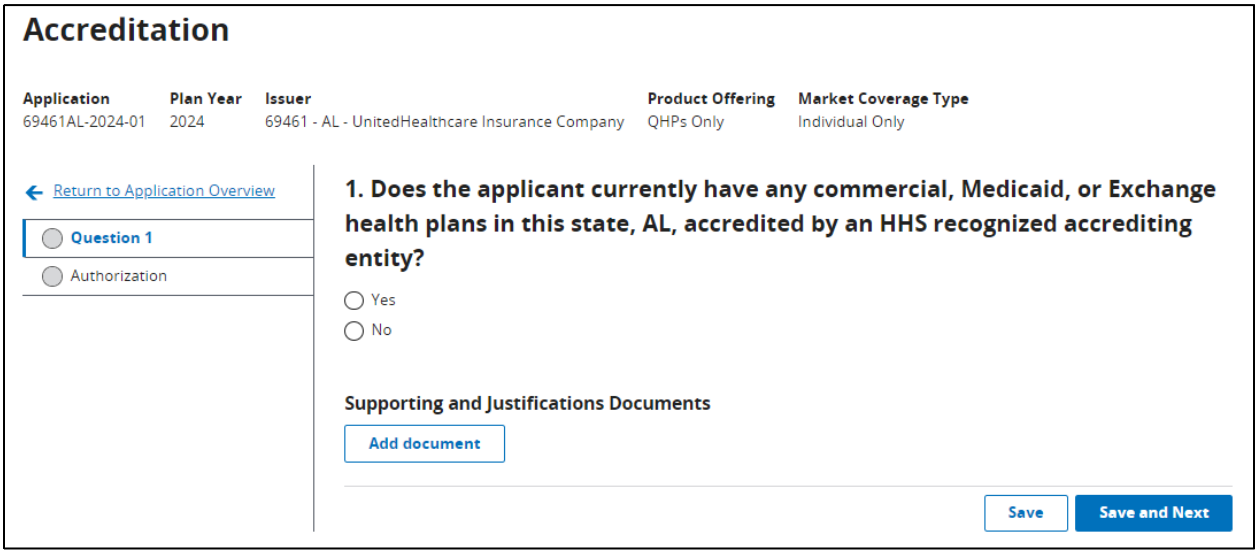


Figure 8-19. Accreditation Question 1

If the user selects 'Yes,' a second question displays requiring the user to indicate which entities they are accredited with. *See Figure 8-20.* The user may select one or more accrediting entities. If the user selects 'No,' they can either upload supporting documentation or proceed to the next step by selecting the 'Save and Next' button.

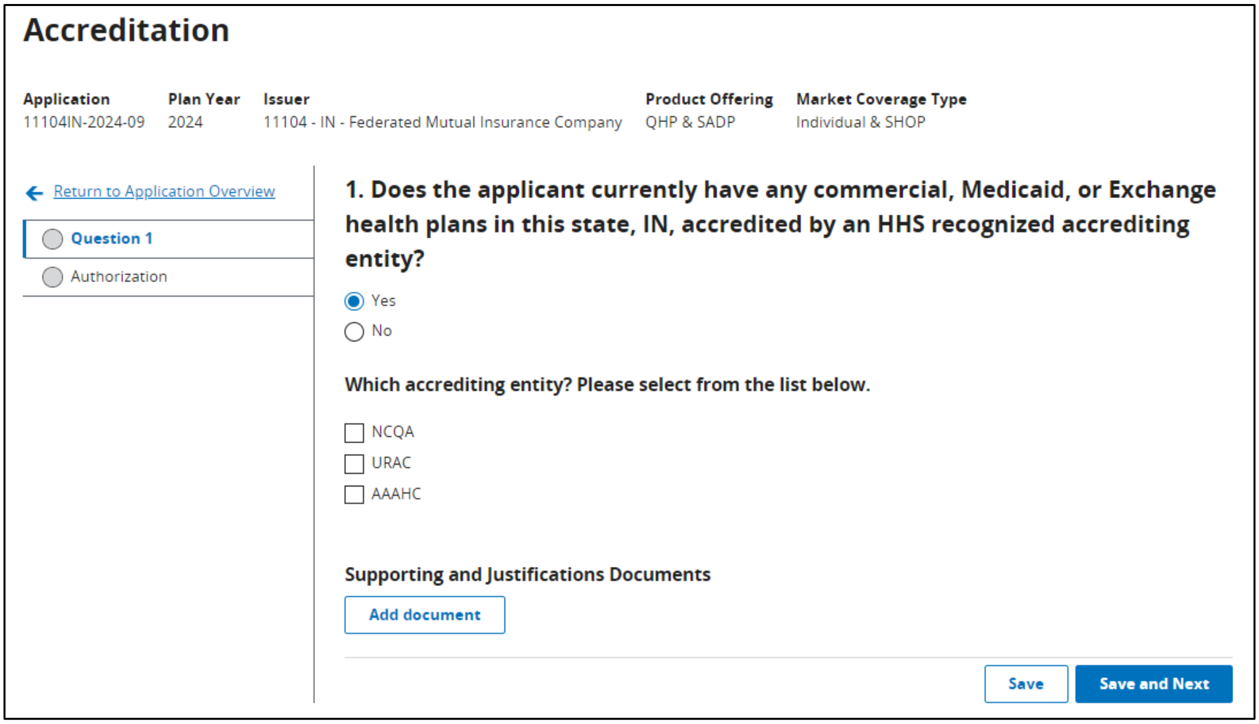


Figure 8-20. Select Accrediting Entity

The user may also choose to upload supporting documentation. *See Figure 8-21*.

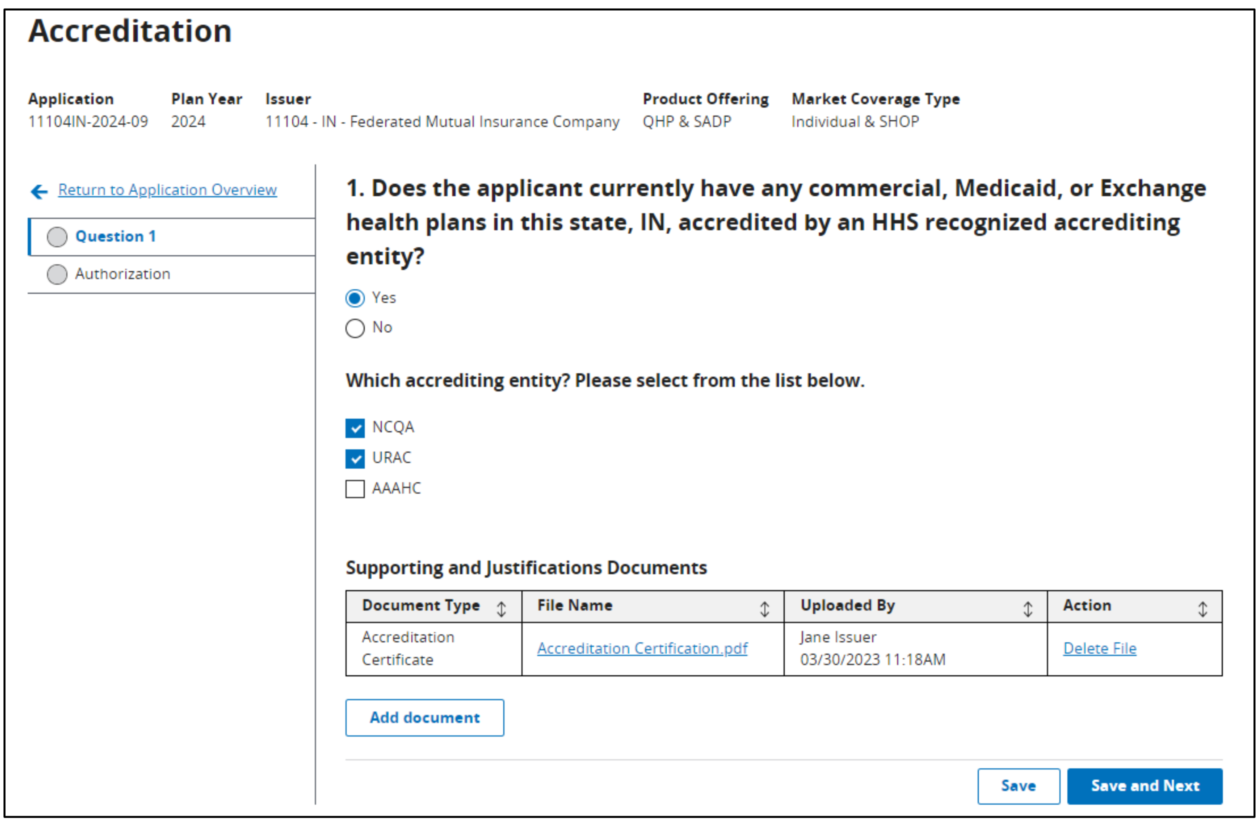


Figure 8-21. Accreditation Supporting Documentation

After selecting the ‘Save and Next’ button, the user is directed to the Authorization tab.

8.9.2 Authorization Acknowledgement

The Authorization tab requires the user to acknowledge the statement displayed on the screen. *See Figure 8-22.*

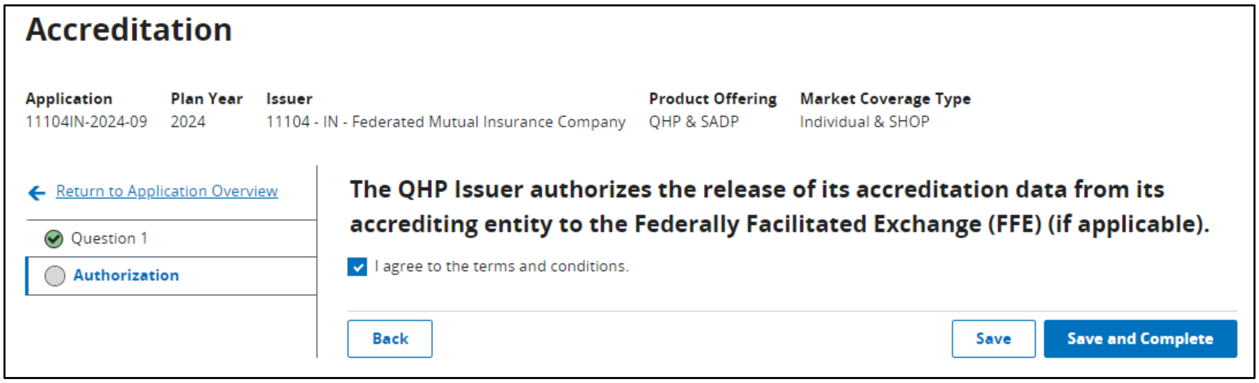


Figure 8-22. Accreditation Authorization Screen

Upon agreeing to the authorization statement, the user may select the ‘Save and Complete’ button, which redirects the user to Application Overview, and the Accreditation Section displays as Completed.

8.10 Transparency in Coverage Section

The Transparency in Coverage Section is required as part of all QHP Applications and requires the user to link a Transparency in Coverage template XML to their application, as well as provide a Transparency in Coverage URL. *See Figure 8-23.*

Note: SERFF issuers will only be able to edit the Transparency in Coverage URL in this section, and not link to a Transparency in Coverage template XML.

The URL must start with http:// or https:// and may only include alphanumeric characters and the special characters listed below:

- ~ (Tilde)
- ` (Grave)
- ! (Exclamation Mark)
- # (Pound)
- @ (At Sign)
- $ (Dollar)
- % (Percentage)
- ^ (Carat)
- & (Ampersand)
- * (Asterisk)
- ( ) (Open and Closed Parenthesis)
- _ (Underscore)
- + (Addition)
- - (Hyphen or Minus)
- = (Equals)
- [ ] (Open and Closed Bracket)
- \ (Backslash)
- {} (Open and Closed Braces)
- ; (Semicolon)
- : (Colon)
- " (Quotation Mark)
- . (Period)
- / (Forward Slash)
- ? (Question Mark)

Selecting the 'Save and Complete' button completes the section and returns the user to Application Overview.

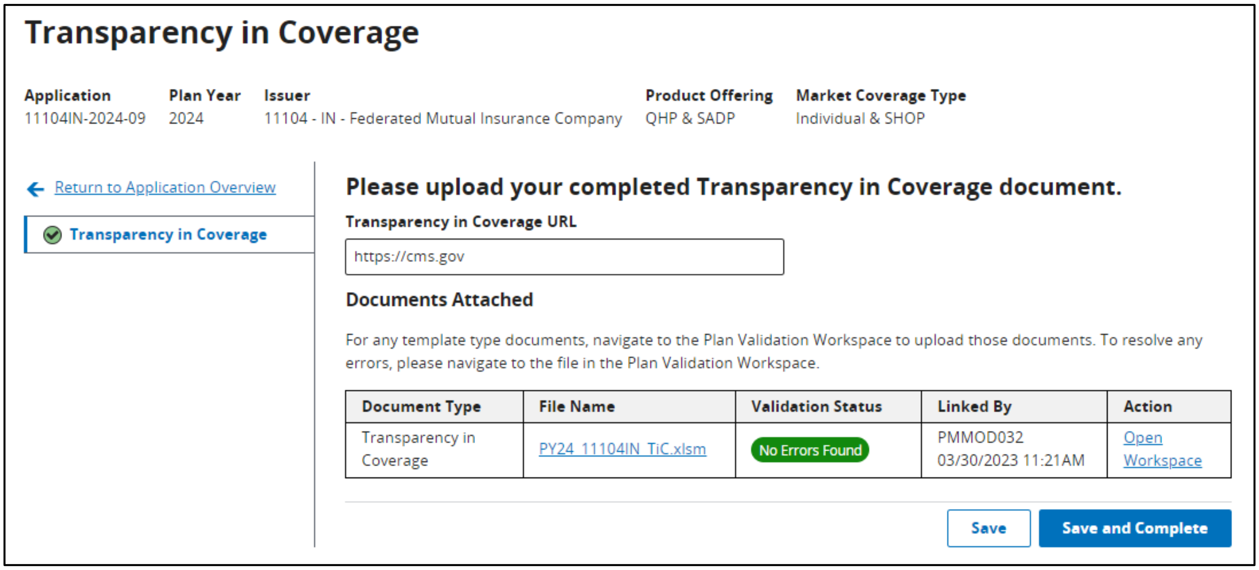


Figure 8-23. Transparency in Coverage Section

8.11 Rates Table Section

The Rates Table Section is required as part of all QHP Applications, and only requires a Rates Table template to be linked. *See Figure 8-24.*

Note: This section will not be editable by SERFF issuers.

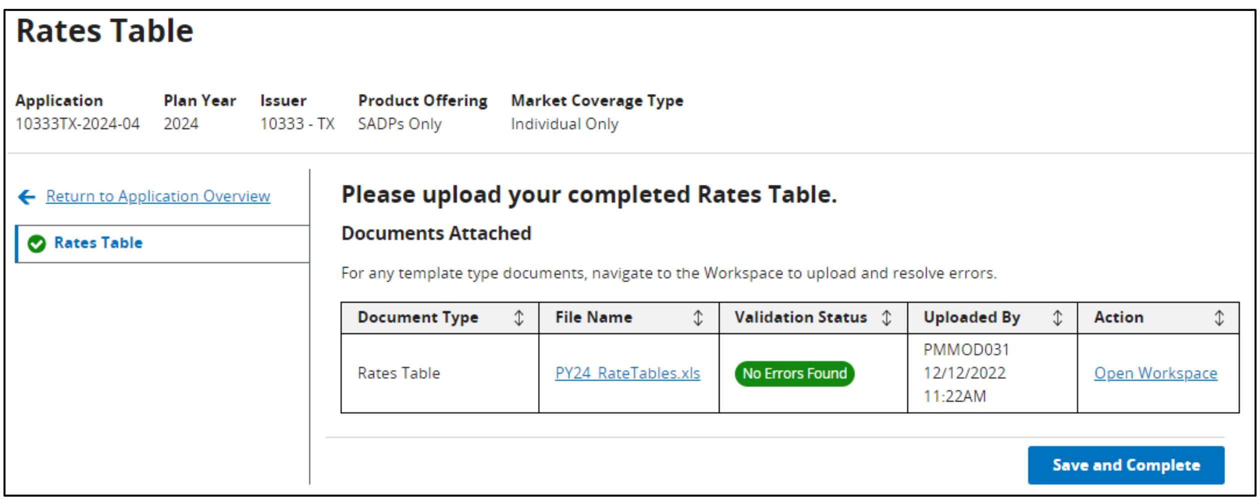


Figure 8-24. Rates Table Section

8.12 URL Section

The URL Section is required as part of all QHP Applications, and the user to update URLs either by linking a URL template or editing directly in the screen. The URL Section will only become available to edit once the Plans and Benefits Section has reached the status of 'Ready to Submit'.

Note: This section will become editable for SERFF issuers once a successful plan transfer has been received.

8.12.1 Generating a URL Template

To generate a URL template, a user should select one or more URL types they wish to pre-populate and select the 'Generate and Download URL Template' button. *See Figure 8-25.* This action will download all required URL ID's the user must provide a URL for, as well as any URLs that have already been submitted for the application.

Note: If a user's Product Offering is SADPs Only, the Formulary URL option does not appear in the list.

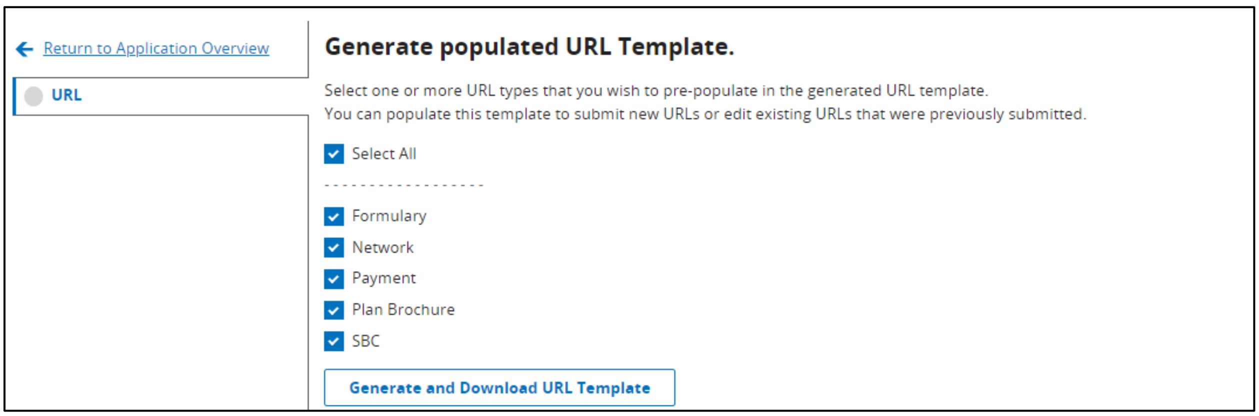


Figure 8-25. Generated Populated URL Template

8.12.2 Linking a URL template

A user may link a completed URL template from the Workspace on the Application Overview page or navigate to the Workspace by selecting the 'Open Workspace' link. *See Figure 8-26.* Once a template has been linked the green success banner will display.

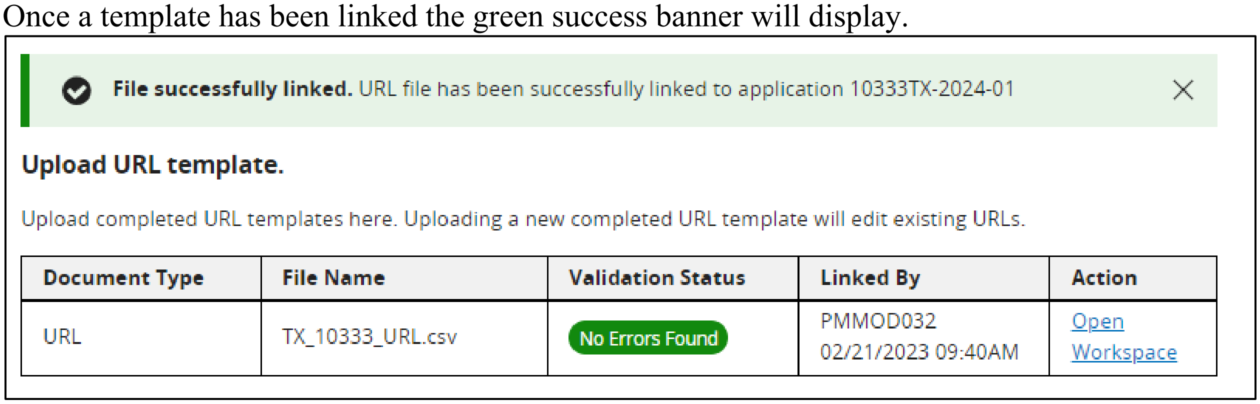


Figure 8-26. Upload URL Template

8.12.3 Editing single URLs

A user may also edit URLs individually by searching for either or both the URL Type using the drop-down menu, or by searching a URL ID. Once a URL is selected, the user may select the ‘Search’ button to find their URL.A user may input their new URL under the New URL column. *See Figure 8-27.*

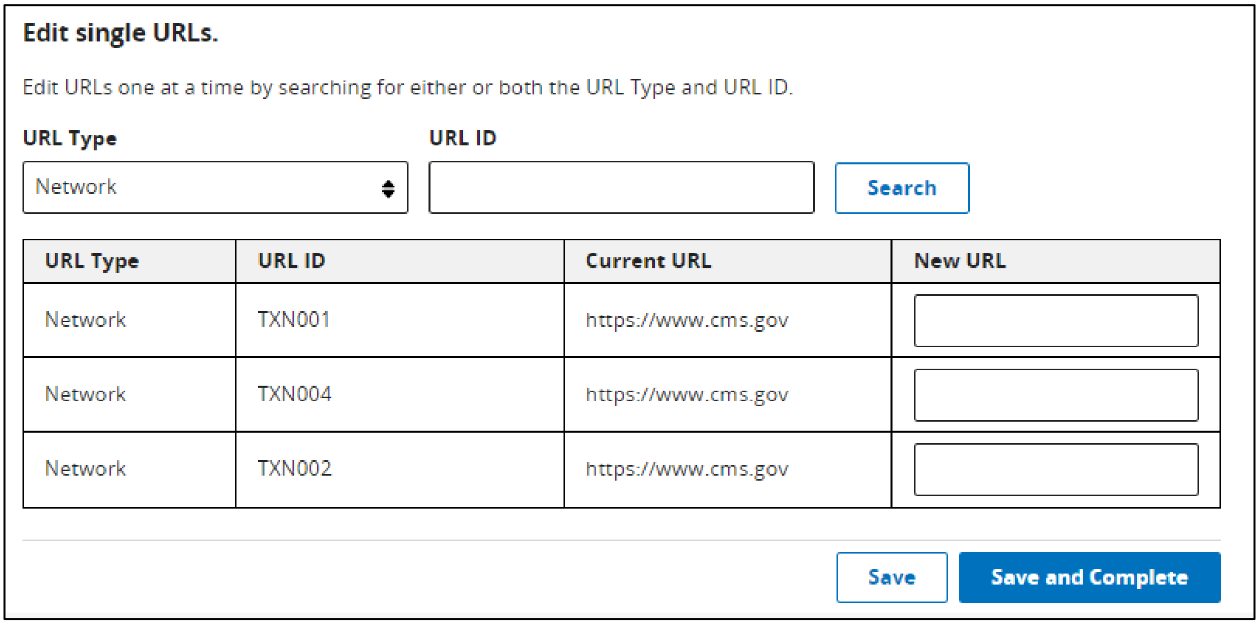


Figure 8-27. Edit Single URLs

8.12.4 Deleting Optional URLs

For optional URLs, the user may also select the ‘Delete’ link under the Action column to remove a previously submitted URL from their application. The delete action will not be available when there is not a Current URL. *See Figure 8-28.*

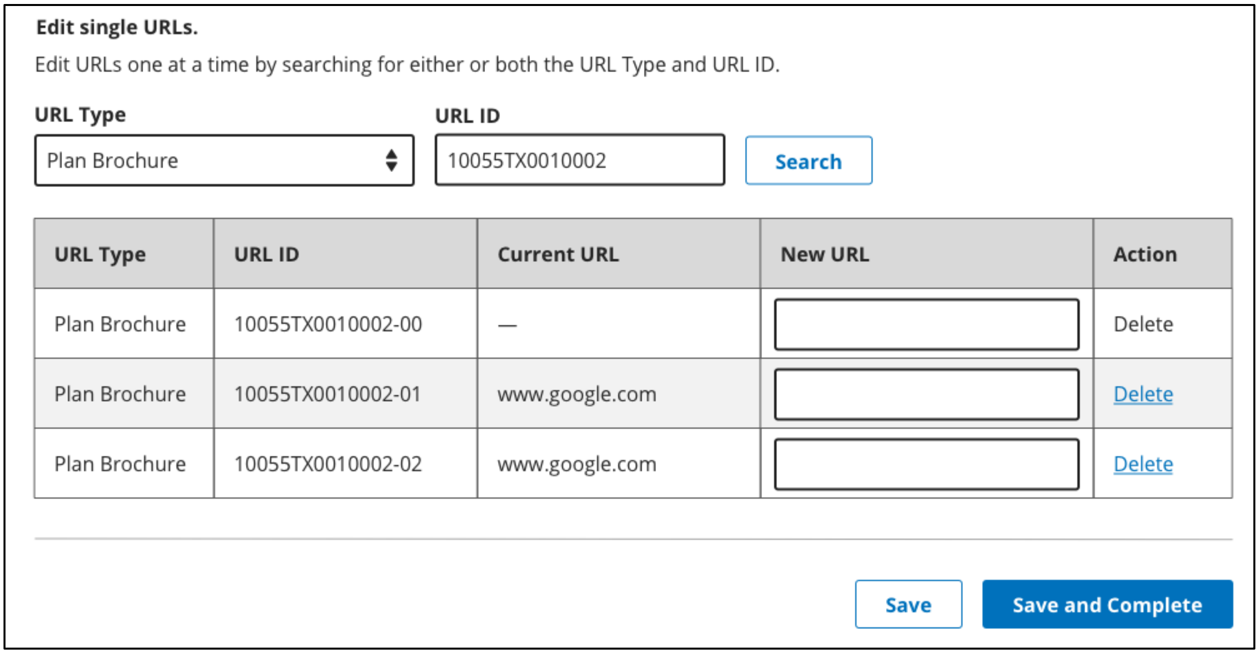


Figure 8-28. Deleting Optional URLs

9 Application Submission

9.1 Submitting an Application Group

After all sections within an application group have reached the status of ‘Ready to Submit’, the user can proceed with submitting the application group by selecting the blue ‘Submit Group’ button. *See Figure 9-1.*

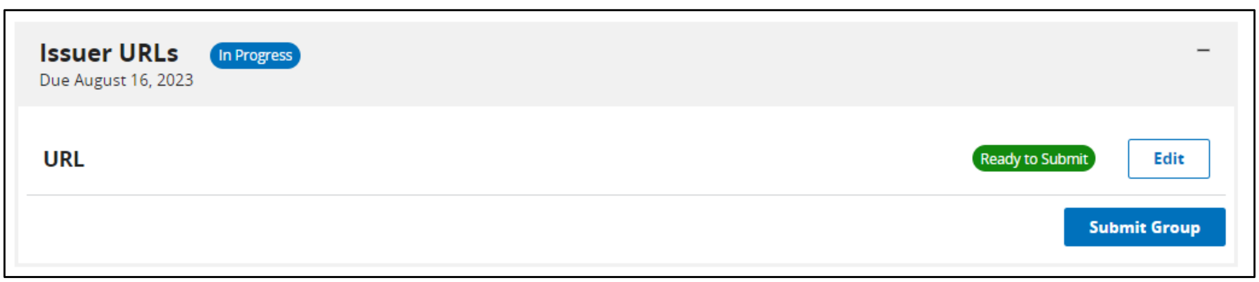


Figure 9-1. Submitting a Group

A pop-up window will appear notifying the user of what happens when an application group is submitted. If a user would like to make additional changes, or is not ready to submit, the user may select the ‘Close’ or ‘No, continue editing’ button. *See Figure 9-2.* Once a user is ready to submit the application group, select the ‘Yes, submit this group’ button. Selecting the ‘Yes, submit this group’ button cannot be undone.

Note: After a user selects the ‘Yes, submit this group’ button, the validation remains accessible in the Workspace to perform template checks.

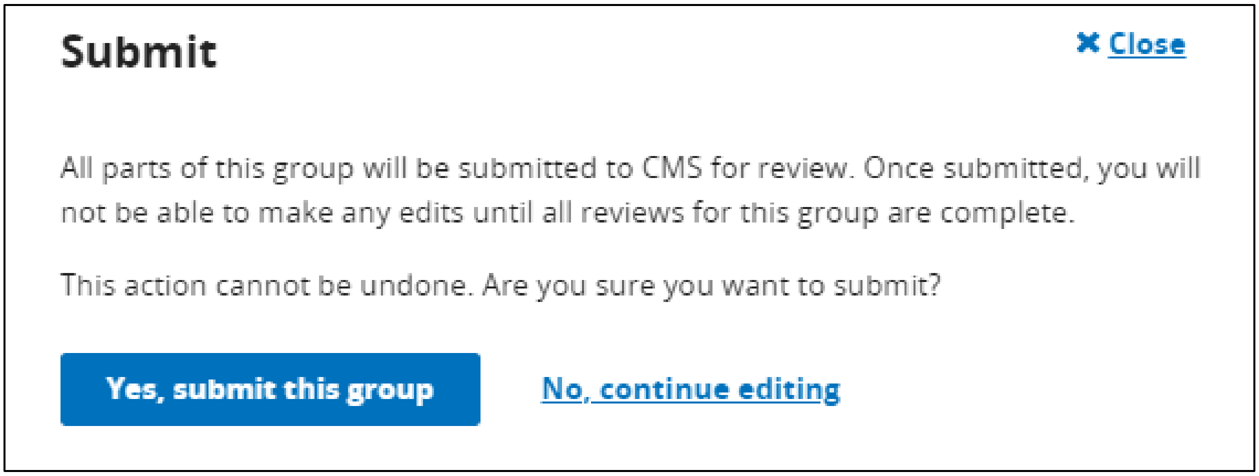


Figure 9-2. Final Submission Check

By selecting ‘Yes, submit this group’ the user is redirected to Application Overview. A green success banner is displayed at the top to confirm the application group was successfully submitted and is pending review. *See Figure 9-3.*

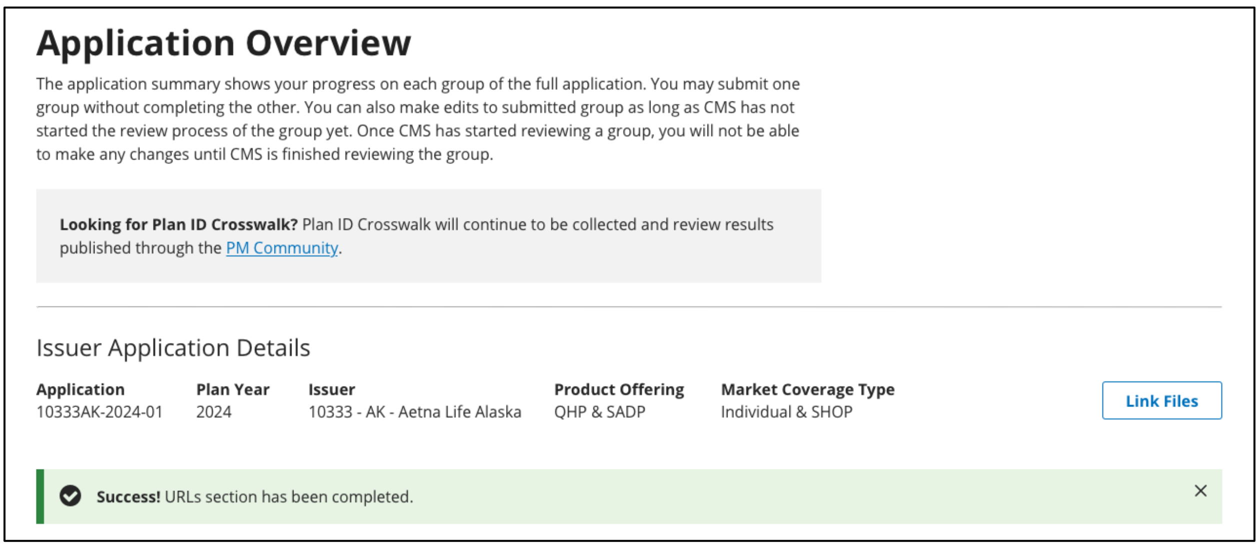


Figure 9-3. Successfully Completed Banner

9.2 Cross Validating Errors

If an element is missing or there is an issue when a user is trying to submit a group, a pop-up message will display to the user detailing the specific Error or Warning found. *See Figure 9-4.* One the user closes the pop-up; they must resubmit the group to see the message again. To download all errors in a CSV format, select the ‘Download (CSV)’ button. The user may make necessary corrections to resubmit the group for review and run cross validations.

Cross Validation Errors

Issuer Application Details

Application	Plan Year	Issuer	Product Offering	Market Coverage Type
10333AK-2024-01	2024	10333 - AK - Aetna Life Alaska	QHP & SADP	Individual & SHOP

Errors must be addressed to submit a group. Resolve errors by uploading new files in the Plan Validation Workspace.
Warnings should be reviewed. Failure to address warnings may result in longer processing times.
Resubmit the group after making corrections to run cross validations and submit for review.

Download (CSV)

Plans & Benefits and Service Area — Errors Found

Severity	Validation Message	Impacted Values
Error	There are no Silver Plans offered in the following counties in the Individual Market. At least one Gold and Silver plan needs to be offered in each county where medical coverage is offered in the Individual Market.	Angelina, Aransas, Armstrong, Atascosa, Bailey, Bandera, Bastrop, Baylor, Bee Bell, Bex, (and more. Download CSV to see all values).
Error	There are no Gold Plans offered in the following counties in the SHOP (Small Group) Market. At least one Gold and Silver plan needs to be offered in each county where medical coverage is offered in the SHOP Market.	Angelina, Aransas, Armstrong, Atascosa, Bailey, Bandera, Bastrop, Baylor, Bee Bell, Bex, (and more. Download CSV to see all values).
Error	There are no Silver Plans offered in the following counties in the SHOP (Small Group) Market. At least one Gold and Silver plan needs to be offered in each county where medical coverage is offered in the SHOP (Small Group) Market.	Angelina, Aransas, Armstrong, Atascosa, Bailey, Bandera, Bastrop, Baylor, Bee Bell, Bex, (and more. Download CSV to see all values).

Show 5 errors per page   Previous 1 Next   Showing **1-3** of **3** errors

Plans & Benefits, Service Area, and Rates Table — Errors Found

Severity	Validation Message	Impacted Values
Error	Plan ID 10333TX0010001 is missing rates in the Rates Table Template for Rating Area 1, which is associated with the following counties covered under the plan's Service Area ID TXS002 from the Service Area Template. Plans with missing rates within a Service Area will not display on HealthCare.gov. Please add rates to the plan's Rating Area or modify the plan's Service Area to exclude counties with missing rates.	Austin, Concho
Warning	Plan ID 10333TX0010001 in the Rates Table Template has rates submitted for Rating Area 7, but the plan's associated Service Area ID TXS001 from the Service Area Template does not cover any of the counties in this Rating Area. Please confirm that the Rates Table Template contains the correct Rating Areas.	--

Show 5 errors per page   Previous 1 Next   Showing **1-2** of **2** errors

Plans & Benefits and Network — Warnings Found

Plans & Benefits and Business Rules — No Errors Found

Figure 9-4. Cross Validation Errors

9.3 Review Results

After CMS performs QHP application group reviews, the user may be notified of required corrections. Corrections are available directly within the application. Corrections are marked by a red badge at the top of the application group. Select the 'View CMS Feedback' link to view the corrections. *See Figure 9-5.*

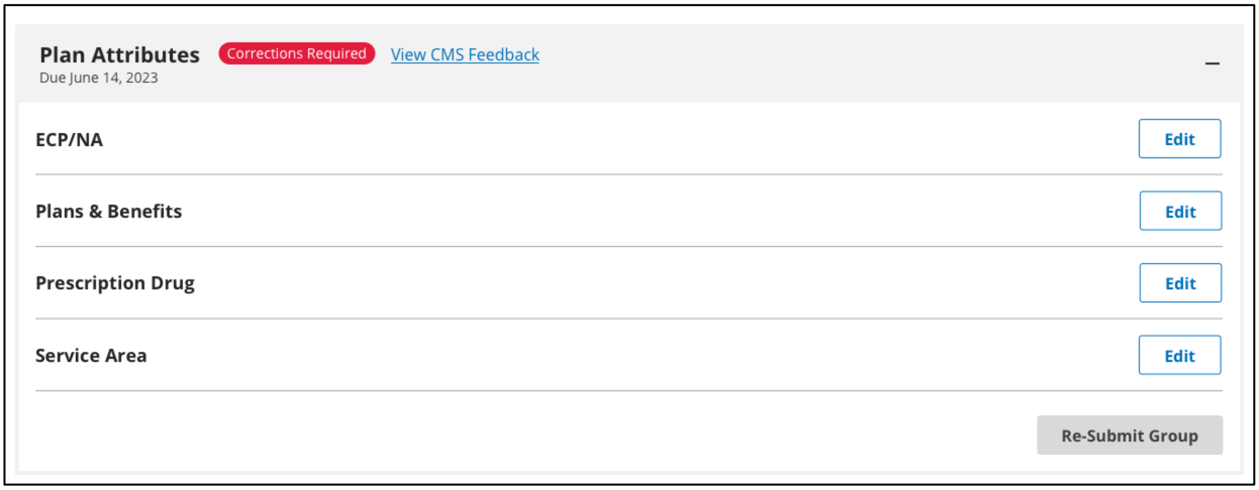


Figure 9-5. Review Results

This link displays the corrections found and a description detailing each correction. To download all corrections in a CSV format, select the 'Download All Reviews (CSV)' button. *See Figure 9-6*. The user may make necessary changes to their application and resubmit for review.

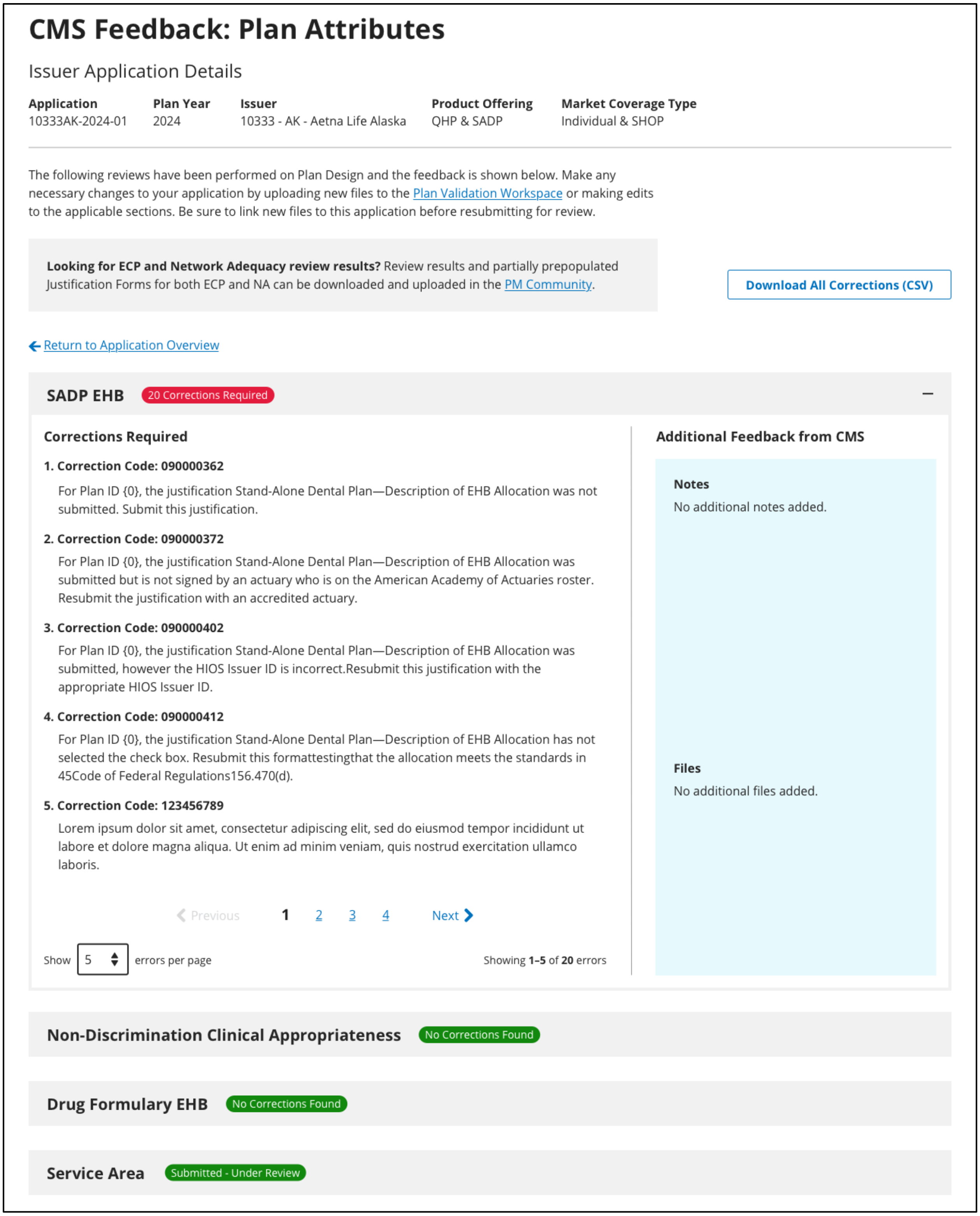


Figure 9-6. CMS Feedback

9.4 Resubmit an Application Group

A user may only edit and submit a group once all reviews for the group have been completed. A user may select a section they wish to update, make necessary changes, and select the 'Save and Complete" button. Once updates are saved, the user is redirected to Application Overview where they may select the 'Submit Group' button to resubmit the application group. *See Figure 9-7.*

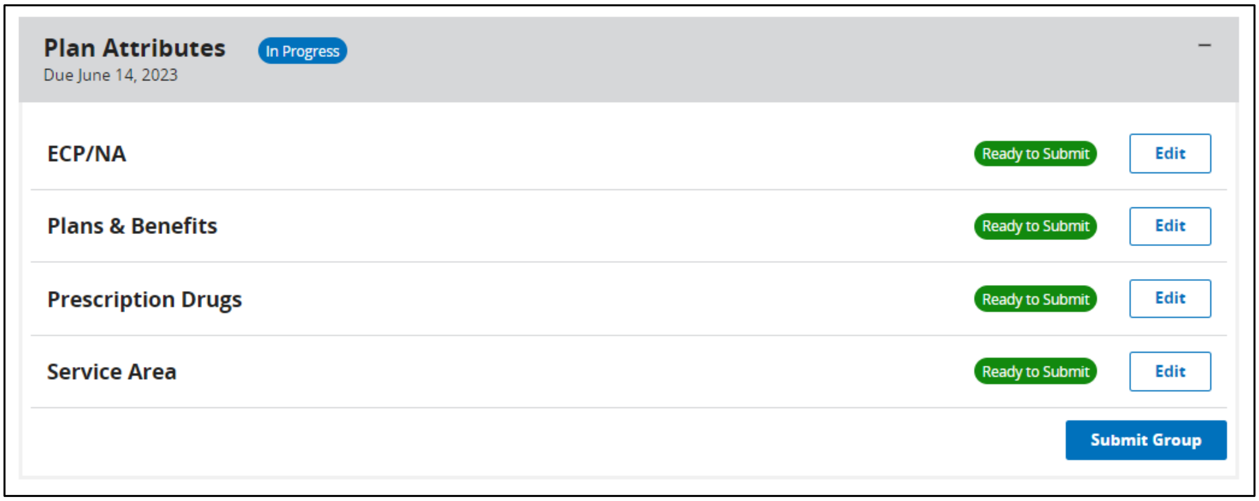


Figure 9-7. Resubmit Group

9.5 Completed Application

Once all application groups have reached a status of 'No Action Required', the application is complete. All sections will display the green "No Action Required" badge in Application Overview. *See Figure 9-8.*

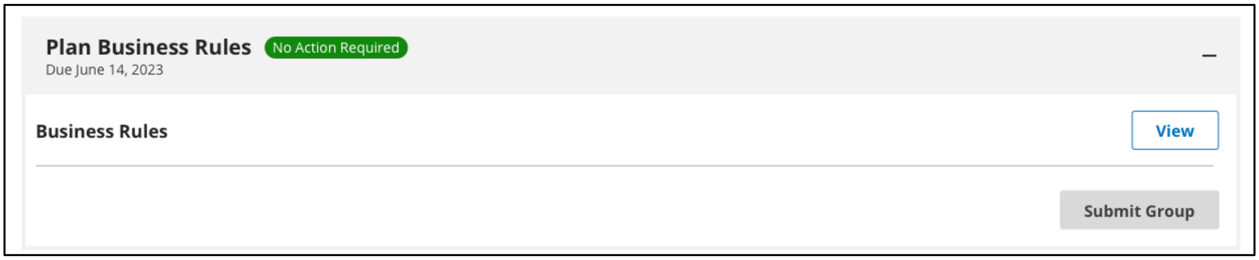


Figure 9-8. Completed Group

9.6 Group Status

The following table details various statuses an application group may have and a description of what triggers the status.

Table 9-1. Group Status & Trigger

Group Status	Trigger
Not Started	• When no sections in an application section have been started, the Grouping status will be Not Started.
In Progress	• When at least 1 section in the Grouping has a status of In Progress or Ready to Submit, the Grouping status will be In Progress. • When a Grouping is in No Action Required status, and the user updates one of their sections, the Grouping status will be updated to In Progress.
Submitted - Under Review	• When the Grouping has been successfully submitted (ie. The user clicked the Submit Group button and there were no errors), and there are reviews triggered for the Grouping, the Grouping status will be Submitted - Under Review. • When a Grouping is in Corrections Required status, and the Grouping is successfully submitted, the Grouping status will update to Submitted – Under Review.
Corrections Required	• When a review is completed for the Grouping, and the result or the review is Completed - Corrections Needed, then the Grouping status will be Corrections Required. • When a Grouping is in Corrections Required status, and the user updates one of their sections, the Grouping status will remain in Corrections Required status.
No Action Required	• When the Grouping has been successfully submitted (ie. The user clicked the Submit Group button and there were no errors), and there are no reviews triggered for the Grouping, the Grouping status will be No Action Required. • When all reviews have been completed for the Grouping, and there are no corrections needed, then the Grouping status will be No Action Required.

10 Troubleshooting & Support

The following details error messaging to assist the user with troubleshooting and resolving issues, special considerations, and support contact information.

10.1 Error Messages

Table 10-1. Error Messages

Error Message	Trigger	Corrective Action
[Filename]: File uploaded is a not allowed file type.	When a user attempts to upload a file type that is not a DOCX, MSG, PDF, or PNG.	Re-upload a file that is one of the allowed file types listed in the instructional text. Upload only the following file types: DOCX, MSG, PDF or PNG.
[Filename]: File name contains special characters that are not allowed.	When a file is uploaded and includes an unallowable character in the file name.	Re-upload the file after removing restricted characters from the file name. Restricted characters include: ‘ (Apostrophe) / (Forward Slash) ; (Semicolon) # (Pound) ((Open Parenthesis)) (Closed Parenthesis) : (Colon) % (Percept) = (Equal Sign) < (Less Than > (Greater Than & (Ampersand) \ (Backslash) “ (Quotation Mark)
[Filename]: File selected is the same template type as another uploaded file. Upload only one file per template type for each validation request.	When a file is the same as a previously uploaded file.	Upload a file for a different template type or remove the file that was already uploaded for the same template type.
Unable to retrieve the Detailed Validation Results: Please try again in a few minutes. If the error persists, please contact the CMS Helpdesk.	When Detailed Validation Results are unable to be retrieved due to technical issues.	Refresh the page or log out and log back into the Submission System after a few minutes.

Error Message	Trigger	Corrective Action
Application already exists: A QHP Application for this plan year, issuer, product offering, and market coverage type combination already exists. Resume the existing application or update one or more values to create a new application.	When an application with the specific plan year, issuer, product offering, and market coverage type has already been created.	Edit the selected Issuer ID or the Plan Year value(s) or edit the application detail values for the existing application on the Application Overview page.
Unable to Complete Domain: Required data has not been submitted to complete this section of your QHP Application. Please provide all necessary documents and/or attestations.	When a Domain section has not been fully completed.	Submit all required data (files and/or attestations) for the domain page(s).
Technical issue encountered: Please try again in a few minutes. If the error persists, please contact the CMS Helpdesk.	When a general technical issue occurs.	Refresh the page or log out and log back into the Submission System after a few minutes.

10.2 Special Considerations

There are no special considerations identified at this time.

10.3 Support

The table below provides details to contact the Help Desk should users require further assistance.

Table 10-2. Support Points of Contact

Contact	Organization	Phone	Email	Role	Responsibility
Marketplace Service Desk (MSD)	CMS	1-855-CMS-1515 (1-855-267-1515)	CMS_FEPS@cms.hhs.gov	Help Desk Support	Initial user support & problem reporting

Appendix A: Acronyms and Abbreviations

Table 10-3. Acronyms and Abbreviations

Acronym / Abbreviation	Definition
CMS	Centers for Medicare and Medicaid Service
HHS	Health and Human Services
HIOS	Health Insurance Oversight System
ID	CMS Enterprise Portal Identifier
MPMS	Marketplace Plan Management System
MR	Machine Readable
QHPs	Qualified Health Plans
SADPs	Stand-Alone Dental Plans
URL	Uniform Resource Locators

Appendix B: Glossary

Table 10-4. Glossary

Term	Definition
N/A	N/A

Appendix C: Referenced Documents

Table 10-5. Referenced Documents

Document Name	Document Number and/or URL	Issuance Date
CMS Machine Readable Tools	Coverage Portal (cms.gov)	N/A
Enterprise Portal User Guide	CMS Enterprise Portal - Enterprise Portal User Guide	N/A
HIOS User Manual	HIOS Portal User Manual (cms.gov)	12/2019
Identity Management User Guide	User Manual Template (cms.gov)	06/17/2022

Appendix D: Record of Changes

Table 10-6. Record of Changes

Version Number	Date	Author/Owner	Description of Change
1.1	03/31/2023	AFS	Addressed CMS Feedback
1.1	04/05/2023	AFS 508 Team	Remediated this document to be 508-compliant.