



**Centers for Medicare & Medicaid Services
Federally Facilitated Exchange**

Contract HHSM-500-2016-00003I / 75FCMC21F0001

**FFE Plan Management
Supplemental Submission Module
User Guide**

**Version 4.2
Plan Year 2023
June 2022**

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1 Introduction

This document provides an overview and step-by-step guide for how to use the *Supplemental Submission Module* system.

The Plan Management (PM) *Supplemental Submission Module* is a web application built in the Health Insurance Oversight System (HIOS) where Issuers can submit the Uniform Resource Locator (URL) associated with their Qualified Health Plan (QHP) Application, Interoperability attestations, and SBC & Formulary files that will be linked to their URLs.

2 Overview

Issuers can use the *Supplemental Submission Module* to submit URL and Interoperability data for the plans they offer. Specifically, the module provides:

- URL data collection templates (.csv files) that Issuers and their representatives can download, populate, and upload into the *Supplemental Submission Module*.
 - Issuers can also submit SBC and Formulary PDF files that will be linked to their SBC & Formulary URLs, to allow for early review of QHP application data that will be posted on the URLs.
- Tools that issuers can use to submit, review, and modify URL data either by uploading a URL data collection template (.csv file) or entering URL information directly into the user interface (UI).
- Interoperability Data Page that Medical Individual FFE and SPE Issuers can use to submit, review, and modify Interoperability data by answering the questions and filling in the URLs and Justification as needed directly into the user interface (UI).

2.1 Document Conventions

Modules or systems are indicated by *italics*. Sections or templates of the *Supplemental Submission Module* are indicated in **bold**. Fields or buttons requiring action are indicated by ***bold italics***. Links requiring action are indicated by [underlined blue text](#).

NOTE: The term ‘user’ is used throughout this document to refer to an individual with access to the *Supplemental Submission Module*.

3 Getting Started

To ensure that the user can access the *Supplemental Submission Module*, this section describes how the web browser should be set up, as well as how to access and navigate the Module. The web page design aligns to the CMS.gov web brand and is Section 508 compliant.

3.1 Set-Up Considerations

To optimize user experience within the *Supplemental Submission Module*:

1. Please **disable pop-up blockers** prior to accessing the Plan Management system.
2. Use one of the following browsers (latest version available for supported operating systems as of 11/19/2020):
 - Edge 93.0
 - Firefox 92.0
 - Chrome 93.0

NOTE: The Module complies with Health and Human Services (HHS) design standards: all associated webpages are designed for viewing at a minimum screen resolution of 1024 x 768.

3.2 User Access Considerations

All users must have a CMS (Centers for Medicare and Medicaid Services) Enterprise Portal Identifier (ID) and HIOS user role to access the system. Users are also required to have a **Submitter** or **Validator** designation for the *Benefits and Service Area Module* in order to access the *Supplemental Submission Module*.

For further details on how to establish a CMS Enterprise Portal ID or how to request a Submitter or Validator role for the *Benefits and Service Area Module*, please contact the Help Desk (see section [5.4](#)).

3.3 Accessing the System

Users can access the module by logging into the CMS Enterprise Portal. The user will be directed to their “My Portal” page and should then select the **HIOS** application. Once in the HIOS portal, choose the **QHP Benefits and Service Area Module** and select **Launch this Module**. Then, on the bottom half of the landing page within the *QHP Supplemental Submission Module* section, select the [Access QHP Supplemental Submission Module](#) link.

3.4 System Organization and Navigation

The *Supplemental Submission Module* consists of the Summary page, Interoperability Data Page, and URL Data page.

The Summary page is the first page users see when navigating to the *Supplemental Submission Module*. It provides the user with the ability to select an Issuer ID, then view and update Interoperability and URL data.

The URL Data page is divided into three sections, which allow the user to submit and review QHP URL submissions either through a .csv file or directly through the UI:

1. Download Issuer URL Template File Section
2. Upload Issuer URL Template, SBC, or Formulary File Section
3. Search & Update URLs Section

These pages are further described within sections [4.1](#) (Summary page) and [4.2](#) (URL Data page).

The Interoperability Data page is divided into three sections, which allow the user to submit and review Interoperability attestations:

1. Introduction Section
2. Attestation and Documentation of Compliance: Patient Access API Section
3. Justification Section

3.5 Exiting the System

To exit the system, click the *Logout* link located at the bottom right corner of the page header.

4 Using the System

The following sections provide instructions about using the various functions and features of the *Supplemental Submission Module*.

4.1 Summary Page

The Summary page, shown in Figure below, is the first page displayed after the user successfully logs into the *Supplemental Submission Module*. The user can access the Interoperability Data Page in order to edit/view their Interoperability attestations for Medical Individual FFE and SPE Issuers. The user can also access the URL Data Page in order to edit/view URL data for Issuers displayed on the Summary Page. An Issuer must have successfully submitted at least one Plans and Benefits template to the *Benefits & Service Area Module* or via the *System for Electronic Rates and Form Filing (SERFF)* system to appear in the Issuers Table.

Plan Management Supplemental Submission
Plan Year: 2023

FUNC02 | Logout

Summary

[User Guide \[PDF, 1.04 MB\]](#)

! Issuers must have State authorization for all QHP data changes. Issuers must check with the applicable State and comply with all requirements prior to submitting any URL changes. By submitting a URL change, you are attesting that the change(s) have been approved by the applicable State.

Start working on Supplemental Submission Module

Issuers [Ⓢ]

Issuer ID	Issuer Legal Name	State	Action:
11104	Insurance Company One	IN	Edit
10055	Insurance Company Two	TX	Edit

Showing 1 to 2 of 2 entries

[HOME](#) | [ACROBAT READER](#) | [ACCESSIBILITY](#) | [WEB POLICIES](#)

CMS A federal government website managed by the U.S. Centers for Medicare & Medicaid Services
7500 Security Boulevard, Baltimore, MD 21244

Figure 4-1: Summary Page

The user may begin editing URL data by selecting the *Edit* button that corresponds with an Issuer in the Issuer’s Table. If a submission window is not currently open, the user can select the *View* button to have read-only access to the *Supplemental Submission Module*.

All columns are sortable by ascending or descending order, using the up and down carets.

If the user does not have access to an Issuer ID that has successfully submitted a valid Plans and Benefits template, the Issuers Table will display “No data available in table,” shown in Figure 2.

Summary

[User Guide \[PDF, 1.04 MB\]](#)

!

Issuers must have State authorization for all QHP data changes. Issuers must check with the applicable State and comply with all requirements prior to submitting any URL changes. By submitting a URL change, you are attesting that the change(s) have been approved by the applicable State.

Start working on Supplemental Submission Module

Issuers [?]

Issuer ID	↕ Issuer Legal Name	↕ State	↕ Action:
No data available in table			

Showing 0 to 0 of 0 entries

Figure 4-2: Summary Page with no Issuers

Table below describes the fields in the Summary page and provides instructions for navigating the Issuers Table.

Table 4-1: Summary Page Fields

Name	Action	Description
Issuers Table	N/A	For HIOS Issuer IDs associated with the account: displays the Issuer IDs and legal names that have successfully submitted a Plans & Benefits template. Displays “No data available in table” if no Issuer IDs have successfully submitted a Plans & Benefits template.
Edit	Select	Navigates to the URL Data page for the selected Issuer. Edit button will appear when there is an open submission window for the Issuer for at least one section in the Supplemental Submission Module (URL Data).
View	Select	Navigates to the URL Data page for the selected Issuer with read-only access. View button will appear when a submission window is closed for the Issuer for all sections of the Supplemental Submission Module (URL Data).

4.2 URL Data Page

The URL Data page allows users to review and update URL data and is divided into three main sections: the **Download Issuer URL Template File** section, the **Upload Issuer URL Template, SBC, or Formulary File** section, and the **Search & Update URLs** section.

Figure below shows the URL Data page.

The screenshot shows the 'URL Data' page with a navigation bar at the top containing 'Interoperability Data' and 'URL Data'. A 'User Guide [PDF, 1.04 MB]' link is in the top right. A blue banner with a warning icon states: 'Issuers must have State authorization for all QHP data changes. Issuers must check with the applicable State and comply with all requirements prior to submitting any URL changes. By submitting a URL change, you are attesting that the change(s) have been approved by the applicable State.'

The 'Download Issuer URL Template File' section has a 'Choose URL Types' label and a grid of buttons: 'All', 'Transparency in Coverage', 'Payment', 'SBC', 'Network', 'Plan Brochure', 'Formulary', and 'Machine-Readable'. A green 'Generate Issuer URL Template' button with a play icon is to the right.

The 'Upload Issuer URL Template, SBC, or Formulary File' section includes a note that fields with a red asterisk are required and a prompt to 'Please select URL Template, Formulary, or SBC from the dropdown.' A dropdown menu is set to 'URL Template'. Below it, a prompt says 'Please upload your URL template in CSV format' with a 'Choose File' button and a 'No file chosen' text box.

The 'Search & Update URLs' section has a 'Choose URL Type' dropdown menu.

The footer contains links for 'HOME | ACROBAT READER | ACCESSIBILITY | WEB POLICIES', the CMS logo, and the text: 'A federal government website managed by the U.S. Centers for Medicare & Medicaid Services 7500 Security Boulevard, Baltimore, MD 21244'.

Figure 4-3: URL Data Page

4.2.1 Download Issuer URL Template File

Users are able to generate an **Issuer URL Template** file, which will display all URLs currently associated with an Issuer ID. Users will have the ability to filter the URLs that populate in the **Issuer URL Template** file using six criteria: *All, Transparency in Coverage, SBC (Summary of Benefits & Coverage), Plan Brochure, Payment, Network, Formulary, and Machine-Readable*. Users can select one or more URL types to be included in the **Issuer URL Template** or select the *All* button to download a template populated with all seven URL types.

After a user selects which URL type(s) to populate in the template and selects the **Generate Issuer URL Template** button, the [Download Issuer URL Template](#) link will appear.

Figure below shows the template ready for download in the **Download Issuer URL Template File** section.

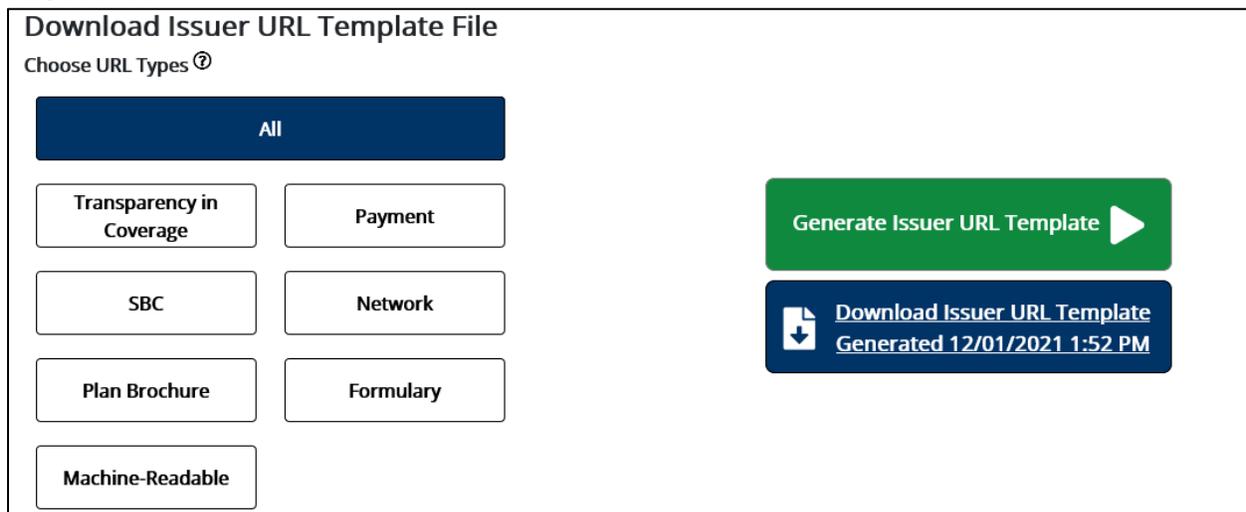


Figure 4-4: Successful Issuer URL Template Generation

Table below describes the fields in the **Download Issuer URL Template File** section.

Table 4-2: Download Issuer URL Template File Section Fields

Field	Action	Description
All	Select	Select All to download the Issuer URL Template file populated with the Transparency in Coverage, Payment, SBC, Network, Plan Brochure, and Formulary URLs currently associated with an Issuer ID. NOTE: selecting the All button will deselect the other six URL type buttons.
Transparency in Coverage	Select	Select Transparency in Coverage to populate only the Transparency in Coverage URL within the Issuer URL Template file. Note: selecting the Transparency in Coverage button will deselect the All button, however the user can multi-select other URL types.

Field	Action	Description
Payment	Select	Select Payment to populate only Payment URL data within the Issuer URL Template file. NOTE: selecting the Payment button will deselect the All button, however the user can multi-select other URL types.
SBC	Select	Select SBC to populate only Summary of Benefits & Coverage URL data within the Issuer URL Template file. NOTE: selecting the SBC button will deselect the All button, however the user can multi-select other URL types.
Network	Select	Select Network to populate only Network URL data within the Issuer URL Template file. NOTE: selecting the Network button will deselect the All button, however the user can multi-select other URL types.
Plan Brochure	Select	Select Plan Brochure to populate only Plan Brochure URL data within the Issuer URL Template file. NOTE: selecting the Plan Brochure button will deselect the All button, however the user can multi-select other URL types.
Formulary	Select	Select Formulary to populate only Formulary URL data within the Issuer URL Template file. NOTE: selecting the Formulary button will deselect the All button, however the user can multi-select other URL types.
Machine-Readable	Select	Select Machine-Readable to populate only Machine-Readable URL & Technical POC Email data within the Issuer URL Template file. NOTE: selecting the Machine-Readable button will deselect the All button, however the user can multi-select other URL types.
Generate Issuer URL Template	Select	Select Generate Issuer URL Template to download the Issuer URL Template file containing the URL Types.
Download Issuer URL Template	Select	The Download Issuer URL Template is displayed once the template has been generated. Selecting the link will download the template and is available until the user logs out.

If a system issue occurs during the generation of an **Issuer URL Template** file, the user will be notified with an error message and prompted to retry downloading, as shown in Figure below. For additional troubleshooting support for the **Download Issuer URL Template File** section, please refer to [section 5.1](#).

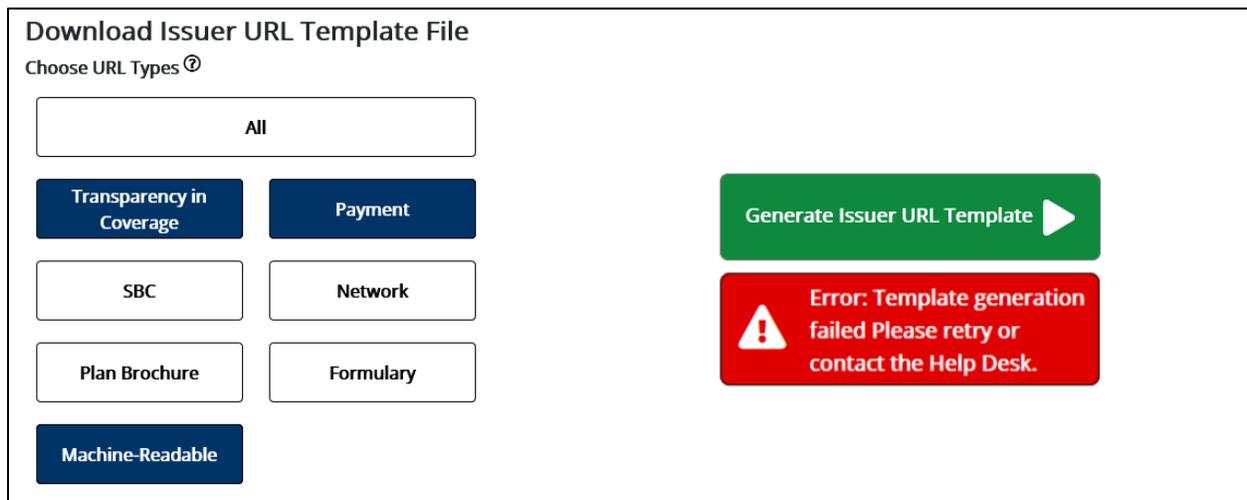


Figure 4-5: Failed Issuer URL Template File Generation

4.2.1.1 Issuer URL Template

The **Issuer URL Template file** provides details of the URLs currently associated with an Issuer ID and allows the user to easily submit a large number of URL changes at once. Users complete the template by entering values in the *New URL* column, then uploading the file to the **Upload Issuer URL Template File** section of the web page. An example of the **Issuer URL Template** file is shown in Figure below.

*For additional instructions on how to download and navigate the **Issuer URL Template**, see [Appendix A](#).

HIOS Issuer ID:	10333						
GENERATED	2021-12-01T13:56:25						
URLs can be edited only with the New URL column (cannot be changed by making edits to the Current URL column). For more details and instructions please reference the user guide that can be downloaded from the UI.							
URL Type	URL ID	Market Ty	Product T1	Current URL	New URL	Current Technical POC Email	New Technical POC Email
Machine-Readable	10333	N/A	N/A		http://machinereadable.com/cmsdata.json	user@email.com	user2@email.com
Transparency in Coverage	10333	N/A	N/A		http://transparencyurl.com	N/A	N/A
Summary of Benefits and Coverage	10333TX0020001-00	N/A	N/A		http://sbcurl.com	N/A	N/A
Formulary	TXF001	N/A	N/A		http://formularyurl.com	N/A	N/A
Network	TXN001	N/A	N/A		http://networkurl.com	N/A	N/A
Plan Brochure	10333TX0020001-00	N/A	N/A		http://planbrochureurl.com	N/A	N/A
Payment	10333TX0020001	N/A	N/A		http://paymenturl.com	N/A	N/A

Figure 4-6: Issuer URL Template File

Table below displays the field names, description, and acceptable values for the **Issuer URL Template** file.

Table 4-3: Issuer URL Template Fields

Field Name	Field Description	Field Rules
HIOS Issuer ID	Unique five-digit number that identifies a specific Issuer.	Numeric: (xxxxx) (HIOS 5-digit Issuer ID)

Field Name	Field Description	Field Rules
Generation Timestamp	Shows the date and time that the Issuer URL Template file was generated.	GENERATED YYYY-MM-DDTHH:MM:SS[Time zone] NOTE: An Issuer URL Template file downloaded from the QHP Certification website will not have a generation timestamp. Template can be uploaded with or without this field.
Instructional Text	Provides user instruction on how to populate the template to make URL updates.	Instructional Text says “ <i>URLs can be edited only with the New URL column (cannot be changed by making edits to the Current URL column). For more details and instruction, please reference the user guide that can be downloaded from the UI.</i> ” NOTE: An Issuer URL Template file can be uploaded with or without this field.
URL Type	Indicates the URL category.	Fields must be populated with one of the following exact text options: 1. Formulary 2. Network 3. Payment 4. Plan Brochure 5. Summary of Benefits and Coverage 6. Transparency in Coverage 7. Machine-Readable

Field Name	Field Description	Field Rules
URL ID	Indicates the identifier associated with the URL and URL Type. These IDs will be pulled from the QHP Templates submitted to the system via the HIOS PM Modules or SERFF.	<p>Field value must align with the URL Type listed for the same row, and follow the conventions listed below:</p> <p>Formulary ID (for Formulary URL Type):</p> <ul style="list-style-type: none"> • Alphanumeric • Consists of state (XX) plus “F” and Formulary ID number (xxx) <ul style="list-style-type: none"> ○ (e.g. TXF001) <p>Network ID (for Network URL Type):</p> <ul style="list-style-type: none"> • Alphanumeric • Consists of state (XX) plus “N” and Network ID number (xxx) <ul style="list-style-type: none"> ○ (e.g. TXN001) <p>Issuer ID (for Transparency in Coverage and Machine-Readable URL Type):</p> <ul style="list-style-type: none"> • Numeric • Unique five-digit number that identifies a specific Issuer. <ul style="list-style-type: none"> ○ (e.g. 12345) <p>Plan ID (for Payment URL Type):</p> <ul style="list-style-type: none"> • Alphanumeric • Consists of an Issuer ID (xxxxx) plus state (XX) plus Product ID number (xxx) and a Plan Unique Identifier number (xxxx) <ul style="list-style-type: none"> ○ (e.g. 12345TX0010001) <p>Plan Variant ID (for Plan Brochure and Summary of Benefits and Coverage URL Types):</p> <ul style="list-style-type: none"> • Alphanumeric • Consists of Plan ID value, followed by a hyphen (-) and a 2-digit variant ID <ul style="list-style-type: none"> ○ (e.g. 12345TX0010001-01) <p>NOTE: Users may not submit new URL IDs to the system via the Issuer URL Template file.</p>

Field Name	Field Description	Field Rules
Market Type	Indicates the Market that the URL ID is associated with.	<p>Fields must be populated with one of the following exact text options:</p> <ol style="list-style-type: none"> 1. Individual 2. SHOP 3. N/A <p>NOTE: Issuers submitting their QHP Application via the HIOS PM Modules should enter the value “N/A”.</p> <p>NOTE: An Issuer URL Template file downloaded within the <i>Supplemental Submission Module</i> will be pre-populated with the value “N/A” for Issuers submitting their QHP Application via the HIOS PM Modules.</p> <p>NOTE: Users will not be able to change their Market Type in the system via the Issuer URL Template file.</p> <p>NOTE: Market Type for Transparency in Coverage URL must have a value of “N/A” for all Issuers.</p>
Product Type	Indicates the Product that the URL ID is associated with.	<p>Fields must be populated with one of the following exact text options:</p> <ol style="list-style-type: none"> 1. HealthCare 2. Dental 3. N/A <p>NOTE: Issuers submitting their QHP Application via the HIOS PM Modules should enter the value “N/A”.</p> <p>NOTE: An Issuer URL Template file downloaded within the <i>Supplemental Submission Module</i> will be pre-populated with the value “N/A” for Issuers submitting their QHP Applications via the HIOS PM Modules.</p> <p>NOTE: Users will not be able to change their Product Type in the FFE system via the Issuer URL Template file.</p> <p>NOTE: Product Type for Transparency in Coverage URL must have a value of “N/A” for all Issuers.</p>

Field Name	Field Description	Field Rules
Current URL	Lists the URL value that is currently stored in the system for the respective URL Type, URL ID, Market Type, and Product Type combination.	<p>Field will contain the latest URL submitted to the system for the Issuer.</p> <p>NOTE: If the value is blank, then it means no URL is currently stored in the system.</p> <p>NOTE: Updates to the value in this column will not be processed and stored in the system.</p>
New URL	Allows the user to submit a new URL, replacing the Current URL in the system for the respective URL Type, URL ID, Market Type, and Product Type combination.	<p>Field should be populated with the new URL the user would like to submit for the Issuer. The URL must meet the following requirements:</p> <ul style="list-style-type: none"> • Must start with “http://” or “https://” • Cannot contain spaces • Cannot contain commas <p>NOTE: If the value is left blank, the system will not process the blank value and no changes will be made to the current URL.</p>
Current Technical POC Email	Lists the email value that is currently stored in the system for the respective Issuer ID.	<p>Field will contain the latest email submitted to the system for the Issuer.</p> <p>NOTE: If the value is blank, then it means no Email is currently stored in the system.</p> <p>NOTE: Updates to the value in this column will not be processed and stored in the system.</p>
New Technical POC Email	Allows the user to submit a new email, replacing the Current Email in the system for the respective Issuer ID.	<p>Field should be populated with the new email the user would like to submit for the Issuer. The Email must meet the following requirements:</p> <ul style="list-style-type: none"> • cannot contain more than 200 characters.” • can only contain the following special characters: @ (at sign), . (period), - (dash), and _ (underscore).” • must contain an @ (at sign).” <p>NOTE: If the value is left blank, the system will not process the blank value and no changes will be made to the current email.</p>

4.2.2 Upload Issuer URL Template File

Users are able to submit URL and Email updates by uploading a completed **Issuer URL Template** file. The system will then validate that **Issuer URL Template** file is in the proper format and contains acceptable values. The URL and Email updates will be stored in the system if the template passes all validations. If there is an error with the uploaded template, the system will return an error message and/or report outlining the validation error. For additional troubleshooting support for the **Upload Issuer URL Template File** section, please refer to [section 5.1.2](#).

4.2.2.1 Creating an Issuer URL Template File in .csv Format

It is recommended to generate and download an **Issuer URL Template File** from the **Download Issuer URL Template File** section of the *Supplemental Submission Module* or from the QHP Certification [website](#). Once the user has made edits and saved changes on the downloaded version, the user can upload the file. In addition, users are also able to create and upload their own template as long as it satisfies the following criteria:

1. The file type must be .csv
2. The file name must be less than or equal to 100 characters, and may only contain the following characters (without spaces):
 - a-z
 - A-Z
 - 0-9
 - . (period)
 - _ (underscore)
 - - (hyphen)
3. The **Issuer URL Template** file must contain the **HIOS Issuer ID** and corresponding value in the first row of the .csv file. The **HIOS Issuer ID** in the uploaded **Issuer URL Template** file must match the Issuer ID selected from the Summary page.
4. The following column headers and information must all be in adjacent cells within the second, third, or fourth row of the .csv file, in the exact order listed below:
 - **URL Type**
 - **URL ID**
 - **Market Type**
 - **Product Type**
 - **Current URL**
 - **New URL**
 - **Current Technical POC Email**
 - **New Technical POC Email**

4.2.2.2 Uploading the Issuer URL Template File

Users can upload the **Issuer URL Template** file by performing the following actions:

1. In the **Upload Issuer URL Template, SBC, or Formulary File** section of the **URL Data** page, select the **Choose File** button.
2. Select an appropriate **Issuer URL Template .csv** file. The name of the chosen file will appear on the field next to the **Choose File** button.
3. Select the **Submit** button.

Figure below shows the **Upload Issuer URL Template File** section.

Upload Issuer URL Template, SBC, or Formulary File [Ⓜ]

Fields marked with a red asterisk (*) are required.

Please select URL Template, Formulary, or SBC from the dropdown.

URL Template

Please upload your URL template in CSV format

Choose File IssuerURLTemplate... Submit

Figure 4-7: Upload Issuer URL Template File Section with Uploaded File

Table below describes the fields in the **Upload Issuer URL Template, SBC, or Formulary File** section.

Table 4-4: Upload Issuer URL Template File Section Fields

Field Name	Description
File Input button	The user is prompted to select a .csv file to submit.
Submit button	This button is clicked to submit the selected Issuer URL Template file for validation and storage.

4.2.2.3 Upload Issuer URL Template File – Validating Status

Once the **Issuer URL Template** file has been selected and the **Submit** button has been selected, a **Status** will appear. The following statuses can be found in this status box:

- Validating [Issuer URL Template file name]
- [Issuer URL Template file name] submitted successfully
- [Issuer URL Template file name] failed validations. [View Error Report](#)

The **Status** will automatically refresh within the page once the file has been validated. The **Validating** status shows that the system is currently validating and/or saving the file. Users are not allowed to upload a new file while a file is in **Validating** status.

Figure below shows an example of an **Issuer URL Template** file in **Validating** status.

Upload Issuer URL Template, SBC, or Formulary File [?]

Fields marked with a red asterisk (*) are required.

Please select URL Template, Formulary, or SBC from the dropdown.

URL Template

Please upload your URL template in CSV format

No file chosen ○ Validating IssuerURLTemplate.csv

Figure 4-8: Upload Issuer URL Template File in Validating Status

4.2.2.4 Upload Issuer URL Template File – Submission Successful Status

If the **Issuer URL Template** file passes validation and was stored successfully, a **Submission Successful** status will display. Users are able to upload a new file once the submission is successful.

Figure below shows an example of an **Issuer URL Template** file in **Submission Successful** status.

Upload Issuer URL Template, SBC, or Formulary File [?]

Fields marked with a red asterisk (*) are required.

Please select URL Template, Formulary, or SBC from the dropdown.

URL Template

Please upload your URL template in CSV format

No file chosen ✔ IssuerURLTemplate.csv submitted successfully

Figure 4-9: Upload Issuer URL Template File in Successful Submission Status

4.2.2.5 Upload Issuer URL Template File – Error Status

If the **Issuer URL Template** file fails validations, the user will see an **Error** status and a downloadable Error Report, which can be accessed via the [View Error Report](#) link. In the event that an **Issuer URL Template** file enters an **Error** status, the submitted updates are not saved, and the user must correct the errors before uploading a new file.

Figure below shows an example of an **Issuer URL Template File** in **Error** status.

Upload Issuer URL Template, SBC, or Formulary File [Ⓜ]

Fields marked with a red asterisk (*) are required.

Please select URL Template, Formulary, or SBC from the dropdown.

URL Template

Please upload your URL template in CSV format

Choose File

No file chosen

✘ IssuerURLTemplate.csv failed validations. [View Error Report](#)

Figure 4-10: Upload Issuer URL Template File in Error Status

The Error Report will be the same **Issuer URL Template** file submitted by the user, but with two additional columns to indicate whether each row was valid or had errors. If the row had errors, a detailed error message is also provided. Users may enter updates directly to the rows that failed validation in the Error Report, then resubmit the file to the **Upload Issuer URL Template File** field. Users are not required to delete the Valid/Error or Error Message columns for the re-uploaded file to process successfully. A sample of the Error Report is shown in Figure below.

	A	B	C	D	E	F	G	H	I	J
1	HIOS Issuer ID:	39364								
2	GENERATED 2021-12-28T14:33:50									
3	URLs can be edited only with the New URL column (cannot be changed by making edits to the Current URL column). For more details and instructions please reference the user guide that can be downloaded from the UI.									
4	URL Type	URL ID	Market Ty	Product T	Current New URL	Current Tech	New Technical POC Email	Valid/Error	Error Message	
5	Machine-Readable	39364	N/A	N/A	http://http://url.com	hello@gmail	email@gmail.com	Error	URL value does not meet required specifications. Please confirm URL ends with ';json';Email value does not meet required specifications.	
6	Transparency in Coverage	39364	N/A	N/A	url.com			Error	URL value does not meet required specifications. Please confirm URL begins with either 'http://' or 'https://'.	
7	Summary of Benefits and Coverage	39364ND00	N/A	N/A	http://http://url.com			Error	URL value does not meet required specifications. Please remove all spaces from URL.	
8	Summary of Benefits and Coverage	39364ND00	N/A	N/A	http://http://url.com			Error	URL value does not meet required specifications. Please remove all commas from URL.	
9	Summary of Benefits and Coverage	39364ND00	N/A	N/A	http://http://url-com			Error	URL value does not meet required specifications. Please remove all > (greater than) characters from URL.	
10	Summary of Benefits and Coverage	39364ND00	N/A	N/A	http://http://url-com			Error	URL value does not meet required specifications. Please remove all < (less than) characters from URL.	
11	Summary of Benefits and Coverage	39364ND00	N/A	N/A	http://http://url-com			Error	URL value does not meet required specifications. Please remove all ' (single quote) characters from URL.	
12	Summary of Benefits and Coverage	39364ND00	N/A	N/A	http://http://url-com			Error	URL value does not meet required specifications. Please remove all - (two consecutive hyphen) characters from URL.	
13	Summary of Benefits and Coverage	39364ND00	N/A	N/A	http://https://hostname&&here.com/			Error	URL format is invalid. Please conform URL to appropriate format. Acceptable format - https://host.name-here.com/path?q=query	

Figure 4-11: Issuer URL Template File Error Report

Table below provides a list of the possible error messages that may appear in the Error Report.

Table 4-5: Issuer URL Template – Validations and Error Messages

Validation	Error Message
URL Type does not match accepted values.	If blank – “No URL Type found. Please fill in the URL Type with one of the accepted values: Formulary; Network; Payment; Plan Brochure; Summary of Benefits and Coverage; Transparency in Coverage; Machine-Readable.”
	If invalid – “URL Type is invalid. Please restrict values to the following: Formulary; Network; Payment; Plan Brochure; Summary of Benefits and Coverage; Transparency in Coverage; Machine-Readable.”
URL ID does not match URL IDs currently stored for the Issuer.	If blank – “No URL ID found. Please fill in the URL ID.”
	If not found in database – “URL ID is not found. URL ID does not match URL ID’s stored for Issuer.”
	If invalid – “URL ID is invalid. Please conform URL ID to appropriate format.”

Validation	Error Message
Market Type does not match accepted values.	<p>If blank – “No Market Type found. Please fill in the Market Type with one of the accepted values: Individual; SHOP; N/A.”</p> <p>If invalid – “Invalid Market Type. Please fill in the Market Type with one of the accepted values: Individual; SHOP; N/A.”</p>
Product Type does not match accepted values.	<p>If blank – “No Product Type found. Please fill in the Product Type with one of the accepted values: HealthCare; Dental; N/A.”</p> <p>If invalid – “Invalid Product Type. Please fill in the Product Type with one of the accepted values: HealthCare; Dental; N/A.”</p>
New URL did not pass structural validations.	<p>If URL does not start with http:// or https:// - “URL value does not meet required specifications. Please confirm URL begins with either ‘http://’ or ‘https://’.” (Note: This error applies to all URL Types except Machine-Readable)</p> <p>If Machine-Readable URL does not start with https:// - “URL value does not meet required specifications. Please confirm URL begins with ‘https://’.”</p> <p>If URL contains a space – “URL value does not meet required specifications. Please remove all spaces from URL.”</p> <p>If URL contains a comma – “URL value does not meet required specifications. Please remove all commas from URL.”</p> <p>If URL exceeds 600 characters – “URL value does not meet required specifications. Please restrict URL length to be less than or equal to 600 characters.”</p> <p>If URL has a (') single quote – "URL value does not meet required specifications. Please remove all ' (single quote) characters from URL."</p> <p>If URL has a (<) less than – "URL value does not meet required specifications. Please remove all < (less than) characters from URL."</p> <p>If URL has a (>) greater than – "URL value does not meet required specifications. Please remove all > (greater than) characters from URL."</p> <p>If URL has (--) consecutive hyphens – "URL value does not meet required specifications. Please remove all -- (two consecutive hyphen) characters from URL."</p> <p>If URL format is invalid – “URL format is invalid. Please conform to appropriate format. Acceptable format - https://host.name-here.com/path?q=query.”</p>

Validation	Error Message
<p>New URL did not pass structural validations.</p>	<p>If URL has Unicode characters that are not allowed – "URL value does not meet required specifications. Please only use Unicode characters mentioned in user guide."</p> <p>If Machine-Readable URL does not end with .json - "URL value does not meet required specifications. Please confirm URL ends with '.json'."</p> <p>Allowed Unicode characters:</p> <ul style="list-style-type: none"> • ~ • ` • ! • @ • # • \$ • % • ^ • & • * • (•) • _ • + • - • = • [•] • \ • { • } • • ; • : • " • . • / • ?
<p>Market and Product Type combination do not match respective URL ID</p>	<p>"Market and Product Type combination do not match respective URL ID. Please update Product and/or Market Type combination or URL ID."</p>

Validation	Error Message
Required URL IDs do not have a corresponding URL submitted	<p>If Network URL was submitted and there are On-Exchange Network IDs without corresponding URLs – “A Network URL value is required for all Network IDs associated to On-Exchange plans. Please submit a Network URL for this Network ID.”</p> <p>If Formulary URL was submitted and there are On-Exchange Formulary IDs without corresponding URLs – “A Formulary URL value is required for all Formulary IDs associated to On-Exchange plans. Please submit a Formulary URL for this Formulary ID.”</p> <p>If Summary of Benefits and Coverage URL was submitted and there are On-Exchange QHP Plan Variant IDs without corresponding URLs – “A Summary of Benefits and Coverage URL value is required for all On-Exchange Medical Plan Variant IDs. Please submit a Summary of Benefits and Coverage URL for this Plan Variant ID.”</p> <p>If Network URL was submitted and a Transparency in Coverage URL has not been submitted – “A Transparency in Coverage URL value is required for the Issuer ID. Please submit a Transparency in Coverage URL for this Issuer ID.”</p> <p>Machine-Readable URL – “A Machine-Readable URL value is required for the Issuer ID. Please submit a Machine-Readable URL for this Issuer ID.”</p> <p>Technical POC Email – “A Technical POC Email value is required for the Issuer ID. Please submit a Technical POC Email for this Issuer ID.”</p>
User enters a URL into the “New Technical POC Email” column for a URL Type that is not Machine-Readable	New Technical POC Email column should only be filled in for Machine-Readable URL type.

4.2.2.6 Uploading the SBC File

Users can upload the **SBC** file by performing the following actions:

1. In the **Upload Issuer URL Template, SBC, or Formulary File** section of the **URL Data** page, select SBC from the dropdown, then select the *choose from folder or drag and drop the file into the upload box*.
2. Select an appropriate **SBC** .pdf or .zip file. The name of the chosen file will appear within the upload box section.
3. Select the **Upload** button.

Figure below shows the **Upload SBC File** section.

Upload Issuer URL Template, SBC, or Formulary File [Ⓜ]

Fields marked with a red asterisk (*) are required.

Please select URL Template, Formulary, or SBC from the dropdown.

SBC

Please select the SBC file(s) you would like to upload. You may upload a Zip file with multiple PDF files or an individual PDF file. Please use the following naming format for each SBC file: [PlanVariantID]_SBC.pdf. (Example: 12345MD0010001-01_SBC.pdf).

Note: SBC files are only required for Medical Plan Variants. Please only upload SBC Documents for the current plan year.

Add File
Select .zip or .pdf file

Drag file here or [choose from folder](#)

Figure 4-12: Upload SBC File Section

Table below describes the fields in the **Upload Issuer URL Template, SBC, or Formulary File** section.

Table 4-6: Upload SBC File Section Fields

Field Name	Description
Upload box	<p>The user is able to upload a .pdf or .zip file using “choose from folder” or the drag and drop feature</p> <p>Note:</p> <ul style="list-style-type: none"> Only upload ZIP files under 300MB. Split into multiple Zip files if necessary. Only ZIP the PDF files directly, do not use subfolders. Only upload one ZIP or PDF file at a time. Only use the following naming format for each SBC file: [PlanVariantID]_SBC.pdf. (Example: 12345MD0010001-01_SBC.pdf).
Upload button	This button is clicked to upload the selected SBC file for validation and storage.

4.2.2.7 Upload SBC File – Validating Status

Once the **SBC** file has been selected and the *Upload* button has been selected, a **Status** will appear. The following statuses can be found in this status box:

- Validating [SBC file name]

The **Status** will automatically refresh within the page once the file has been validated. The **Validating** status shows that the system is currently validating and/or saving the file. Users are not allowed to upload a new file while a file is in **Validating** status.

Figure below shows an example of an **SBC** file in **Validating** status.

The screenshot shows a web form titled "Upload Issuer URL Template, SBC, or Formulary File" with a registered trademark symbol. Below the title, it states "Fields marked with a red asterisk (*) are required." and "Please select URL Template, Formulary, or SBC from the dropdown." A dropdown menu is shown with "SBC" selected. Below this, it says "Please select the SBC file(s) you would like to upload. You may upload a Zip file with multiple PDF files or an individual PDF file. Please use the following naming format for each SBC file: [PlanVariantID]_SBC.pdf. (Example: 12345MD0010001-01_SBC.pdf)." A note follows: "Note: SBC files are only required for Medical Plan Variants. Please only upload SBC Documents for the current plan year." Under the heading "Add File", it says "Select .zip or .pdf file". A large rectangular area contains a single file entry: a circular progress indicator followed by the text "Validating 10055TX0010004-01_SBC.pdf". At the bottom right of the form is a grey "Upload" button.

Figure 4-13: Uploaded SBC File in Validating Status

4.2.2.8 Upload SBC File – Submission Successful Status

If the **SBC** file passes validation and was stored successfully, a **Submission Successful banner** will display. Users are able to upload a new file once the submission is successful.

Figure below shows an example of an **SBC** file in **Submission Successful** status.

Upload Issuer URL Template, SBC, or Formulary File[®]

Fields marked with a red asterisk (*) are required.

Please select URL Template, Formulary, or SBC from the dropdown.

SBC

Please select the SBC file(s) you would like to upload. You may upload a Zip file with multiple PDF files or an individual PDF file. Please use the following naming format for each SBC file: [PlanVariantID]_SBC.pdf. (Example: 12345MD0010001-01_SBC.pdf).

Note: SBC files are only required for Medical Plan Variants. Please only upload SBC Documents for the current plan year.

✓ Your SBC file has been uploaded successfully.

Add File
Select .zip or .pdf file

Drag file here or [choose from folder](#)

Figure 4-14: Uploaded SBC File in Successful Submission Status

4.2.2.9 Upload SBC File – Error Status

If the **SBC** file fails validations, the user will see an **Error** banner and a downloadable Error Report, which can be accessed via the [View Error Report](#) link. In the event that an **SBC** file enters an **Error** status, the submitted updates are not saved and the user must correct the errors before uploading a new file.

Figure below shows an example of an **SBC File** in **Error** status.

Upload Issuer URL Template, SBC, or Formulary File [Ⓢ]

Fields marked with a red asterisk (*) are required.

Please select URL Template, Formulary, or SBC from the dropdown.

SBC

Please select the SBC file(s) you would like to upload. You may upload a Zip file with multiple PDF files or an individual PDF file. Please use the following naming format for each SBC file: [PlanVariantID]_SBC.pdf. (Example: 12345MD0010001-01_SBC.pdf).

Note: SBC files are only required for Medical Plan Variants. Please only upload SBC Documents for the current plan year.

✘ 10055TX0010004_ABCD.pdf failed validations. [View Error Report](#)

Add File
Select .zip or .pdf file

Drag file here or [choose from folder](#)

Upload

Figure 4-15: Uploaded SBC File in Error Status

The Error Report will contain two columns to indicate the file name and error message. User will need to fix these errors in the original uploaded file, and reupload. A sample of the Error Report is shown in Figure below.

	A	B
1	File Name	Error Message
2	10055TX0010004_ABCD.pdf	Invalid filename format uploaded. Please only use this filename format for SBC PDFs: [PlanVariantID]_SBC.pdf.
3		
4		
5		
6		
7		

Figure 4-16: SBC File Error Report

Table below provides a list of the possible error messages that may appear in the Error Report.

Table 4-7: SBC File – Validations and Error Messages

Validation	Error Message
SBC file does not match accepted values.	<p>If invalid file extension – “Invalid file extension uploaded. Please only upload PDF or Zip file extension.”</p> <p>If invalid file type (also shown when renaming another document type into a PDF or Zip) – “Invalid file type uploaded. Please only upload PDF or Zip file type.”</p> <p>If invalid filename format – “Invalid filename format uploaded. Please only use this filename format for SBC PDFs: [PlanVariantID]_SBC.pdf.”</p> <p>If filename is duplicated within the zip file – “Filename is duplicated. Please remove one or rename the file with a different Plan Variant ID.”</p> <p>If Plan Variant ID in filename does not exist/was not uploaded via Plans and Benefits template - “Plan Variant ID [PlanVariantID] does not exist. Please edit the file to have a valid Plan Variant ID.”</p> <p>Note: This Error will not show until user has fixed errors 1-4</p>

4.2.2.10 Uploading the Formulary File

Users can upload the **Formulary** file by performing the following actions:

1. In the **Upload Issuer URL Template, SBC, or Formulary File** section of the **URL Data** page, select **Formulary** from the dropdown, then select the **Formulary IDs** the PDF will be assigned to in the Formulary ID dropdown, and next select the *choose from folder or drag and drop the file into the upload box*.
2. Select an appropriate **Formulary** .pdf file. The name of the chosen file will appear within the upload box section.
3. Select the **Upload** button.

Figure below shows the **Upload Formulary File** section.

Upload Issuer URL Template, SBC, or Formulary File [?]

Fields marked with a red asterisk (*) are required.

Please select URL Template, Formulary, or SBC from the dropdown. * Please select the Formulary IDs to be assigned to the PDF document being uploaded

Formulary Please select Formulary IDs

Please upload your Formulary file in PDF format

Note: Please only upload a Formulary Document for the current plan year.

Drag file here or [choose from folder](#)

Upload

Figure 4-17: Upload Formulary File Section

Table below describes the fields in the **Upload Issuer URL Template, SBC, or Formulary File** section.

Table 4-8: Upload Formulary File Section Fields

Field Name	Description
Upload box	The user is able to upload a .pdf file using “choose from folder” or the drag and drop feature Note: <ul style="list-style-type: none"> Only upload one PDF file at a time. Select the formulary ids to be linked to the PDF in the Formulary ID dropdown in order to upload
Please select Formulary IDs dropdown	The user is required to select the Formulary IDs that were uploaded via Prescription Drugs template in order to link the file being uploaded to correct Formulary IDs.
Upload button	This button is clicked to upload the selected Formulary file for validation and storage.

4.2.2.11 Upload Formulary File – Validating Status

Once the **Formulary** file has been selected and the **Upload** button has been selected, a **Status** will appear. The following statuses can be found in this status box:

- Validating [SBC file name]

The **Status** will automatically refresh within the page once the file has been validated. The **Validating** status shows that the system is currently validating and/or saving the file. Users are not allowed to upload a new file while a file is in **Validating** status.

Figure below shows an example of a **Formulary** file in **Validating** status.

Upload Issuer URL Template, SBC, or Formulary File [?]

Fields marked with a red asterisk (*) are required.

Please select URL Template, Formulary, or SBC from the dropdown.

Formulary

* Please select the Formulary IDs to be assigned to the PDF document being uploaded

TXF001, TXF002, TXF003, TXF004, TXF005, TXF006, TXF007, TXF008, TXF009

Please upload your Formulary file in PDF format

Note: Please only upload a Formulary Document for the current plan year.

Validating Sample_formulary_One.pdf

Upload

Figure 4-18: Uploaded Formulary File in Validating Status

4.2.2.12 Upload Formulary File – Submission Successful Status

If the **Formulary** file passes validation and was stored successfully, a **Submission Successful banner** will display. Users are able to upload a new file once the submission is successful.

Figure below shows an example of a **Formulary** file in **Submission Successful** status.

Upload Issuer URL Template, SBC, or Formulary File [?]

Fields marked with a red asterisk (*) are required.

Please select URL Template, Formulary, or SBC from the dropdown.

Formulary

* Please select the Formulary IDs to be assigned to the PDF document being uploaded

TXF001, TXF002, TXF003, TXF004, TXF005, TXF006, TXF007, TXF008, TXF009

✓ Your Formulary file has been uploaded successfully.

Please upload your Formulary file in PDF format

Note: Please only upload a Formulary Document for the current plan year.

Drag file here or [choose from folder](#)

Upload

Figure 4-19: Uploaded Formulary File in Successful Submission Status

4.2.2.13 Upload Formulary File – Error Status

If the **Formulary** file fails validations, the user will see an **Error** banner and a downloadable Error Report, which can be accessed via the [View Error Report](#) link. In the event that a

Formulary file enters an **Error** status, the submitted updates are not saved, and the user must correct the errors before uploading a new file.

Figure below shows an example of a **Formulary File** in **Error** status.

Upload Issuer URL Template, SBC, or Formulary File[®]

Fields marked with a red asterisk (*) are required.

Please select URL Template, Formulary, or SBC from the dropdown. * Please select the Formulary IDs to be assigned to the PDF document being uploaded

Formulary TXF001, TXF002, TXF003, TXF004, TXF005, TXF006, TXF007, TXF008, TXF009

✘ IssuerURLTemplate.csv failed validations. [View Error Report](#)

Please upload your Formulary file in PDF format

Note: Please only upload a Formulary Document for the current plan year.

Drag file here or [choose from folder](#)

Upload

Figure 4-20: Uploaded Formulary File in Error Status

The Error Report will contain two columns to indicate the file name and error message. User will need to fix these errors in the original uploaded file, and reupload. A sample of the Error Report is shown in Figure below.

	A	B
1	File Name	Error Message
2	IssuerURLTemplate.csv	Invalid file type uploaded. Please only upload a PDF file type.
3	IssuerURLTemplate.csv	Invalid file extension uploaded. Please only upload PDF file extension.
4		
5		
6		

Figure 4-21: Formulary File Error Report

Table below provides a list of the possible error messages that may appear in the Error Report.

Table 4-9: Formulary File – Validations and Error Messages

Validation	Error Message
Formulary file does not match accepted values.	If invalid file type (also shown when renaming another document type into a PDF) – “Invalid file type uploaded. Please only upload a PDF file type.” If invalid file extension – “Invalid file extension uploaded. Please only upload PDF file extension.”

4.2.3 Search & Update URLs

Users are able to view URL data currently stored in the system and make quick updates via a search results table. The search results table will only appear after the user has entered search parameters (e.g. selecting a URL type in the dropdown and typing in a URL ID) and clicked the magnifying glass. URL updates submitted via the search results table will undergo the same validations performed on the **Issuer URL Template** file.

4.2.3.1 Search & Update URLs – Choose URL Type Dropdown

The **Search & Update URLs** dropdown is populated with the seven URL types (**Transparency in Coverage**, **Payment**, **SBC**, **Network**, **Plan Brochure**, **Formulary**, and **Machine-Readable**). Users may only review and update one **URL Type** at a time. Multiselect is not available in the dropdown.

Figure below shows the dropdown populated with the seven **URL Type** options.

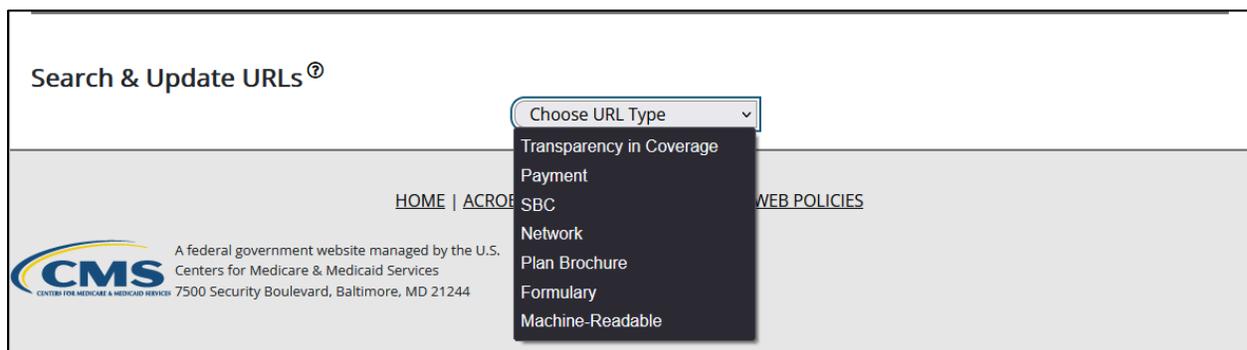


Figure 4-22: Search & Update URLs Dropdown

4.2.3.2 Search & Update URLs – Search Field

Once a **URL Type** is selected in the dropdown, a field will appear where the user can begin entering search parameters for specific URL IDs. Selecting **Transparency in Coverage** or **Machine-Readable** as the **URL Type** will automatically generate the table to begin submitting and updating the Transparency in Coverage URL or Machine-Readable URL and Technical POC Email. In order to search for **Payment**, **Plan Brochure**, and **SBC** URLs, the user should enter the Plan ID they would like to view URL data for. For **Formulary** URLs, the user should enter a Formulary ID. For **Network** URLs, the user should enter a Network ID.

Users may choose to enter a partial string of their URL ID to find a specific URL or leave the search field blank to return all URLs of the selected type. Once the user has entered the desired search parameters, they must select the magnifying glass to return search results.

Figure below shows the search field after URL type is selected.

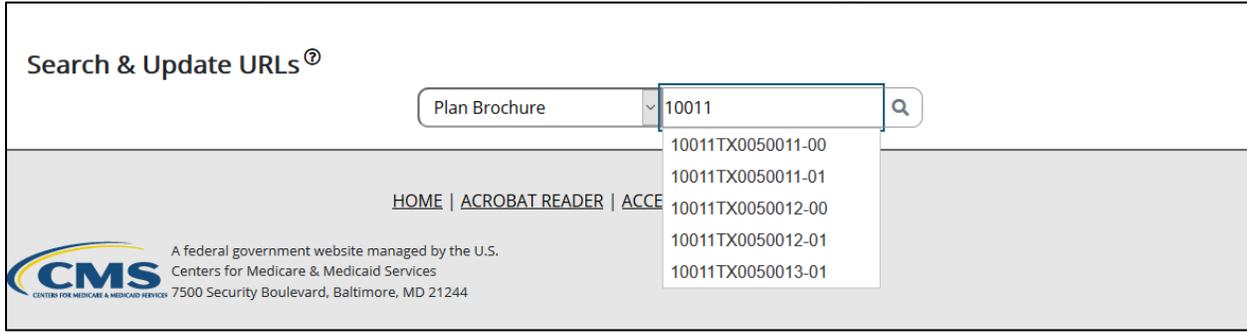


Figure 4-23: Search & Update URLs Search Field

4.2.3.3 Search & Update URLs – Transparency in Coverage URL Display

The search results table will automatically generate after users select **Transparency in Coverage** in the dropdown. Users may use the *New URL* column in the search results table to submit URL updates. New URLs must begin with “http://” or “https://” and cannot contain commas or spaces.

The search results table will contain the following columns when searching for **Transparency in Coverage** URL as shown in Figure below:

- **URL Type**
- **Issuer ID**
- **Current URL**
- **Delete URL**
- **New URL**

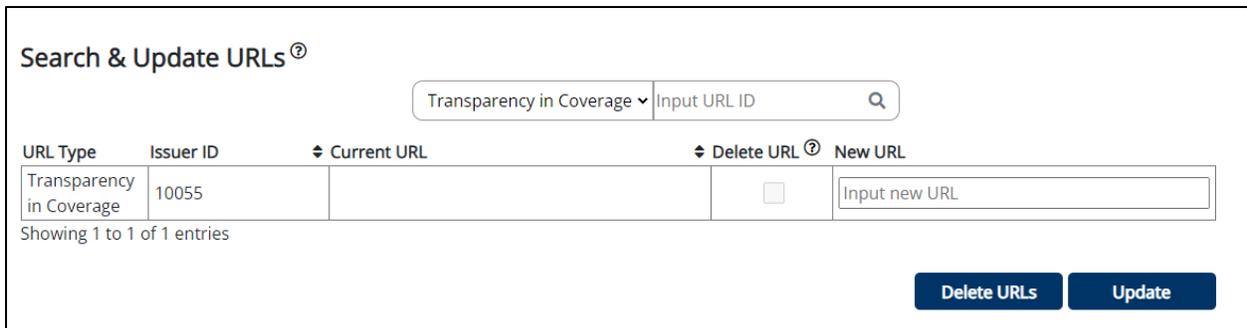


Figure 4-24: Transparency in Coverage URL Type Search Results

4.2.3.4 Search & Update URLs – Payment or Plan Brochure URLs Display

The search results table will be generated after a search is performed. Users may use the *New URL* column in the search results table to submit URL updates. Multiple URL IDs may be updated simultaneously.

The search results table will contain the following columns when searching for **Payment, or Plan Brochure** URLs as shown in Figure below:

- **URL Type**
- **Plan ID or Plan Variant ID**
- **Current URL**
- **Delete URL**
- **New URL**

Search & Update URLs [Ⓢ]

Plan Brochure | Input URL ID | |

URL Type	Plan Variant ID	↕ Current URL	↕ Delete URL [Ⓢ]	New URL
Plan Brochure	10055TX0010001-01		<input type="checkbox"/>	<input type="text" value="Input new URL"/>
Plan Brochure	10055TX0010001-02		<input type="checkbox"/>	<input type="text" value="Input new URL"/>
Plan Brochure	10055TX0010001-03		<input type="checkbox"/>	<input type="text" value="Input new URL"/>
Plan Brochure	10055TX0010002-00		<input type="checkbox"/>	<input type="text" value="Input new URL"/>
Plan Brochure	10055TX0010002-01		<input type="checkbox"/>	<input type="text" value="Input new URL"/>
Plan Brochure	10055TX0010002-02		<input type="checkbox"/>	<input type="text" value="Input new URL"/>
Plan Brochure	10055TX0010002-03		<input type="checkbox"/>	<input type="text" value="Input new URL"/>
Plan Brochure	10055TX0010002-04		<input type="checkbox"/>	<input type="text" value="Input new URL"/>
Plan Brochure	10055TX0010002-05		<input type="checkbox"/>	<input type="text" value="Input new URL"/>
Plan Brochure	10055TX0010002-06		<input type="checkbox"/>	<input type="text" value="Input new URL"/>

Showing 1 to 10 of 47 entries << < Previous 1 2 3 4 5 Next > >>

Figure 4-25: Payment, or Plan Brochure URL Type Search Results

4.2.3.5 Search & Update URLs – Formulary URLs Display

When a user performs a search for **Formulary** URLs, the search results table will display the following columns, as shown in Figure below:

- **URL Type**
- **Formulary ID**
- **Market Type**
- **Current URL**
- **Delete URL**
- **New URL**
- **Uploaded Formulary**

NOTE: Issuers who submit QHP templates via the HIOS PM Modules will not see the **Market Type** column when searching for Formulary IDs.

Search & Update URLs [Ⓜ]

Formulary ▼ Input URL ID 🔍

URL Type	Formulary ID	↕ Current URL	↕ Delete URL [Ⓜ]	New URL	Uploaded Formulary
Formulary	TXF001	https://www.test3.com	<input type="checkbox"/>	<input type="text" value="Input new URL"/>	Sample_formulary_One.pdf
Formulary	TXF002	https://www.test.com	<input type="checkbox"/>	<input type="text" value="Input new URL"/>	Sample_formulary_One.pdf
Formulary	TXF003	https://www.test.com	<input type="checkbox"/>	<input type="text" value="Input new URL"/>	Sample_formulary_One.pdf
Formulary	TXF004	https://www.test.com	<input type="checkbox"/>	<input type="text" value="Input new URL"/>	Sample_formulary_One.pdf
Formulary	TXF005	https://www.test.com	<input type="checkbox"/>	<input type="text" value="Input new URL"/>	sample_formulary-2022.pdf
Formulary	TXF006	https://www.test.com	<input type="checkbox"/>	<input type="text" value="Input new URL"/>	sample_formulary-2022.pdf
Formulary	TXF007	https://www.test.com	<input type="checkbox"/>	<input type="text" value="Input new URL"/>	sample_formulary-2022.pdf
Formulary	TXF008	https://www.test.com	<input type="checkbox"/>	<input type="text" value="Input new URL"/>	sample_formulary-2022.pdf
Formulary	TXF009	https://www.test.com	<input type="checkbox"/>	<input type="text" value="Input new URL"/>	sample_formulary-2022.pdf
Formulary	TXF010	https://www.test.com	<input type="checkbox"/>	<input type="text" value="Input new URL"/>	sample_formulary-2022.pdf

Showing 1 to 10 of 50 entries ⏪ < Previous 1 2 3 4 5 Next > ⏩

Delete URLs
Update

Figure 4-26: Formulary URL Type Search Results

4.2.3.6 Search & Update URLs – SBC URLs Display

When a user performs a search for **SBC** URLs, the search results table will display the following columns, as shown in Figure below:

- **URL Type**
- **Plan Variant ID**
- **Current URL**
- **Delete URL**
- **New URL**
- **Uploaded SBC**

Search & Update URLs [®]

SBC Input URL ID

URL Type	Plan Variant ID	↕ Current URL	↕ Delete URL [?]	New URL	Uploaded SBC
SBC	10055TX0010001-01	http://www.cms.com	<input type="checkbox"/>	<input type="text" value="Input new URL"/>	10055TX0010001-01_SBC.pdf
SBC	10055TX0010001-02	http://www.cms.com	<input type="checkbox"/>	<input type="text" value="Input new URL"/>	10055TX0010001-02_SBC.pdf
SBC	10055TX0010001-03	http://www.cms.com	<input type="checkbox"/>	<input type="text" value="Input new URL"/>	10055TX0010001-03_SBC.pdf
SBC	10055TX0010002-01	http://www.cms.com	<input type="checkbox"/>	<input type="text" value="Input new URL"/>	
SBC	10055TX0010002-02	http://www.cms.com	<input type="checkbox"/>	<input type="text" value="Input new URL"/>	
SBC	10055TX0010002-03	http://www.cms.com	<input type="checkbox"/>	<input type="text" value="Input new URL"/>	
SBC	10055TX0010003-01	http://www.cms.com	<input type="checkbox"/>	<input type="text" value="Input new URL"/>	
SBC	10055TX0010003-02	http://www.cms.com	<input type="checkbox"/>	<input type="text" value="Input new URL"/>	
SBC	10055TX0010003-03	http://www.cms.com	<input type="checkbox"/>	<input type="text" value="Input new URL"/>	
SBC	10055TX0010004-01	http://www.cms.com	<input type="checkbox"/>	<input type="text" value="Input new URL"/>	

Showing 1 to 10 of 46 entries << < Previous 1 2 3 4 5 Next > >>

Figure 4-27: SBC URL Type Search Results

4.2.3.7 Search & Update URLs – Network URLs Display

When a user performs a search for **Network** URLs, the search results table will display the following columns, as shown in Figure below:

- **URL Type**
- **Network ID**
- **Market Type**
- **Product Type**
- **Current URL**
- **Delete URL**
- **New URL**

NOTE: Issuers who submit via the HIOS PM Modules will not see the **Market Type** and **Product Type** columns when searching for Network IDs.

Search & Update URLs [Ⓜ]

Network

URL Type	Network ID	↕ Current URL	↕ Delete URL [Ⓜ]	New URL
Network	TXN001		<input type="checkbox"/>	<input type="text" value="Input new URL"/>
Network	TXN002		<input type="checkbox"/>	<input type="text" value="Input new URL"/>
Network	TXN003		<input type="checkbox"/>	<input type="text" value="Input new URL"/>
Network	TXN004		<input type="checkbox"/>	<input type="text" value="Input new URL"/>
Network	TXN005		<input type="checkbox"/>	<input type="text" value="Input new URL"/>
Network	TXN006		<input type="checkbox"/>	<input type="text" value="Input new URL"/>
Network	TXN007		<input type="checkbox"/>	<input type="text" value="Input new URL"/>
Network	TXN008		<input type="checkbox"/>	<input type="text" value="Input new URL"/>
Network	TXN009		<input type="checkbox"/>	<input type="text" value="Input new URL"/>
Network	TXN010		<input type="checkbox"/>	<input type="text" value="Input new URL"/>

Showing 1 to 10 of 16 entries << < Previous 1 2 Next > >>

Figure 4-28: Network URL Type Search Results

Search & Update URLs – Machine-Readable URLs Display

When a user performs a search for **Machine-Readable** URLs, the search results table will display the following columns, as shown in Figure below:

- **URL Type**
- **Issuer ID**
- **Current URL**
- **Delete URL**
- **New URL**
- **Current Technical POC Email**
- **New Technical POC Email**

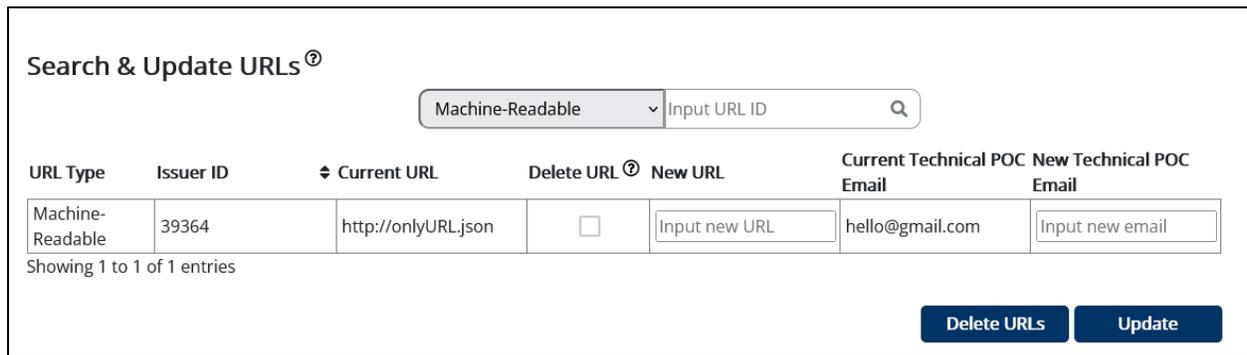


Figure 4-29: Machine-Readable URL Type Search Results

4.2.3.8 Search & Update URLs – No Results Found

If no results are found for the search criteria, the table will display a message of “No records to display”.

Figure below shows the **Search & Update URLs** section when a search did not return any results.

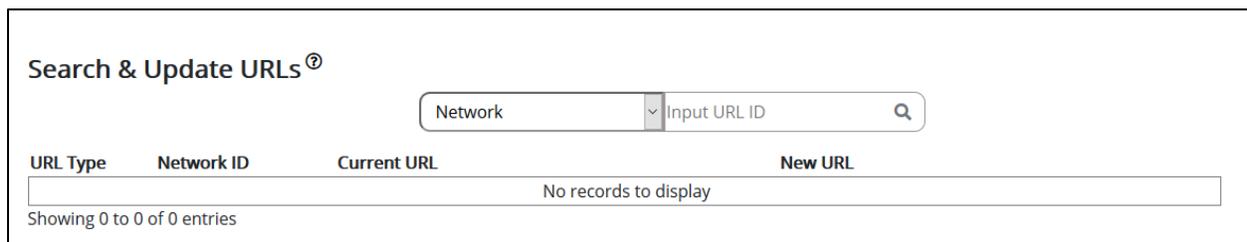


Figure 4-30: Search & Update URLs No Results

4.2.3.9 Update URLs – Confirmation Pop-Up

Select the **Update** button to submit URL updates. A confirmation pop-up will appear listing the URL updates entered in the search results table to confirm the changes they are about to submit.

The user may select the **Update URLs** button to begin validation and storage of the URLs or the **Cancel** button if they determine further updates are needed, as shown in Figure below.

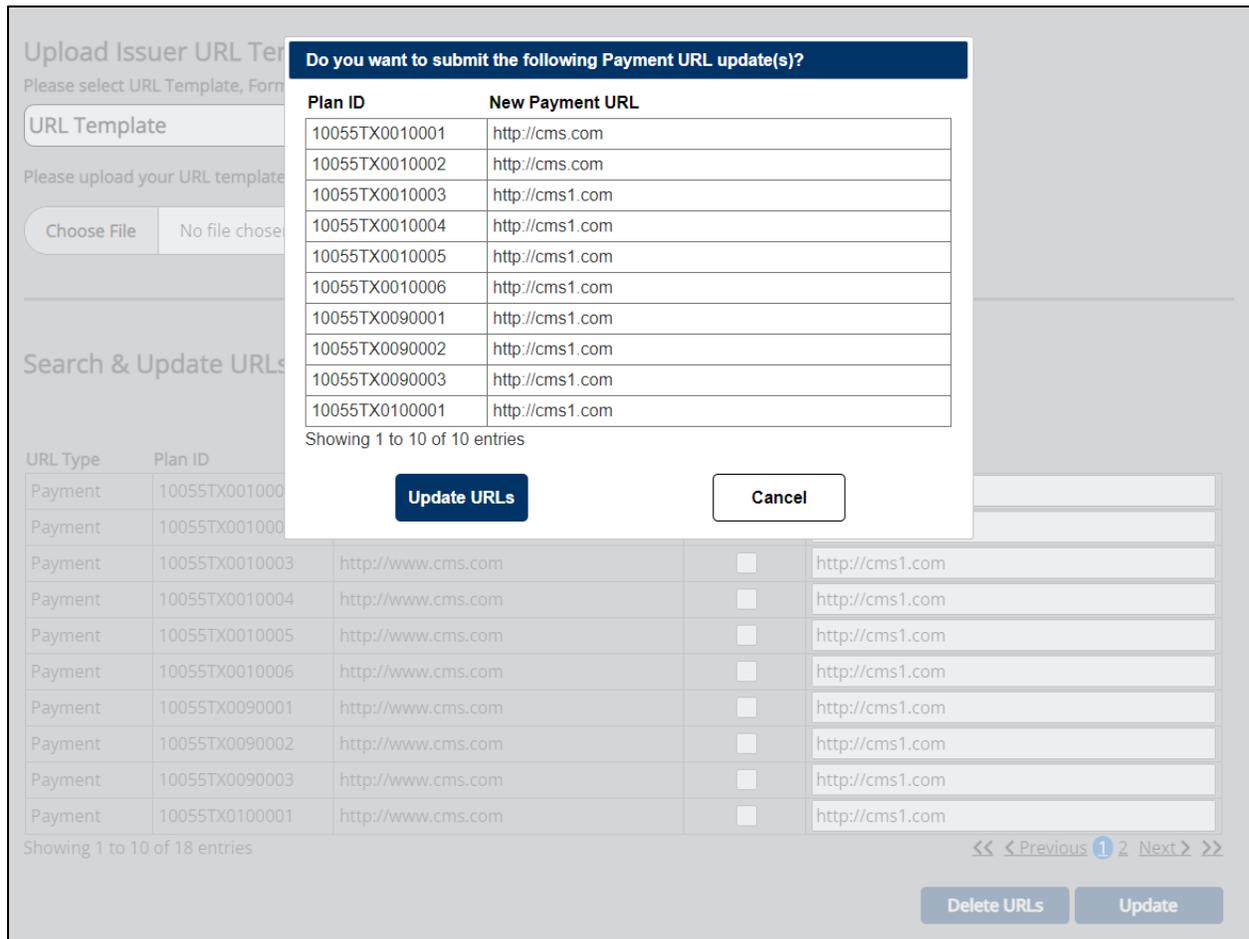


Figure 4-31: URL Update Confirmation Pop-Up

4.2.3.10 Update URLs – Updates Successful

A **Success Banner** will appear when the URL updates have passed validation and been saved. The page will refresh, and URLs entered in the **New URL** column will now appear in the **Current URL** column to show the changes were saved successfully, as shown in Figure below. For additional troubleshooting support for the **Search & Update URLs** section, please refer to [section 5.1.3](#).

Search & Update URLs [Ⓜ]

✓ Your URL changes were loaded successfully.

Payment ▼ 🔍

URL Type	Plan ID	↕ Current URL	↕ Delete URL [Ⓜ]	New URL
Payment	39364ND0010001	http://google.com	<input type="checkbox"/>	<input type="text" value="Input new URL"/>
Payment	39364ND0010002	http://google.com	<input type="checkbox"/>	<input type="text" value="Input new URL"/>
Payment	39364ND0010003	http://google.com	<input type="checkbox"/>	<input type="text" value="Input new URL"/>
Payment	39364ND0010004	http://google.com	<input type="checkbox"/>	<input type="text" value="Input new URL"/>
Payment	39364ND0010005	http://google.com	<input type="checkbox"/>	<input type="text" value="Input new URL"/>
Payment	39364ND0020001	http://google.com	<input type="checkbox"/>	<input type="text" value="Input new URL"/>
Payment	39364ND0020002	http://google.com	<input type="checkbox"/>	<input type="text" value="Input new URL"/>
Payment	39364ND0020003	http://google.com	<input type="checkbox"/>	<input type="text" value="Input new URL"/>
Payment	39364ND0020004	http://google.com	<input type="checkbox"/>	<input type="text" value="Input new URL"/>
Payment	39364ND0020005	http://google.com	<input type="checkbox"/>	<input type="text" value="Input new URL"/>

Showing 1 to 10 of 14 entries ⏪ < Previous 1 2 Next > ⏩

Delete URLs
Update

Figure 4-32: URL Updates Successful Banner

4.2.3.11 Delete URLs – Delete Checkbox

Select the **Delete URL** checkboxes to delete Payment, or Plan Brochure URLs and URLs that are associated to Off-Exchange Plans only. Transparency and Machine-Readable URLs delete checkbox will only be enabled if the Issuer has Off-Exchange plans only. SBC and Formulary URLs along with their files can also be deleted when the plans are marked with a Certification status of Withdrawn or Invalid Submission.

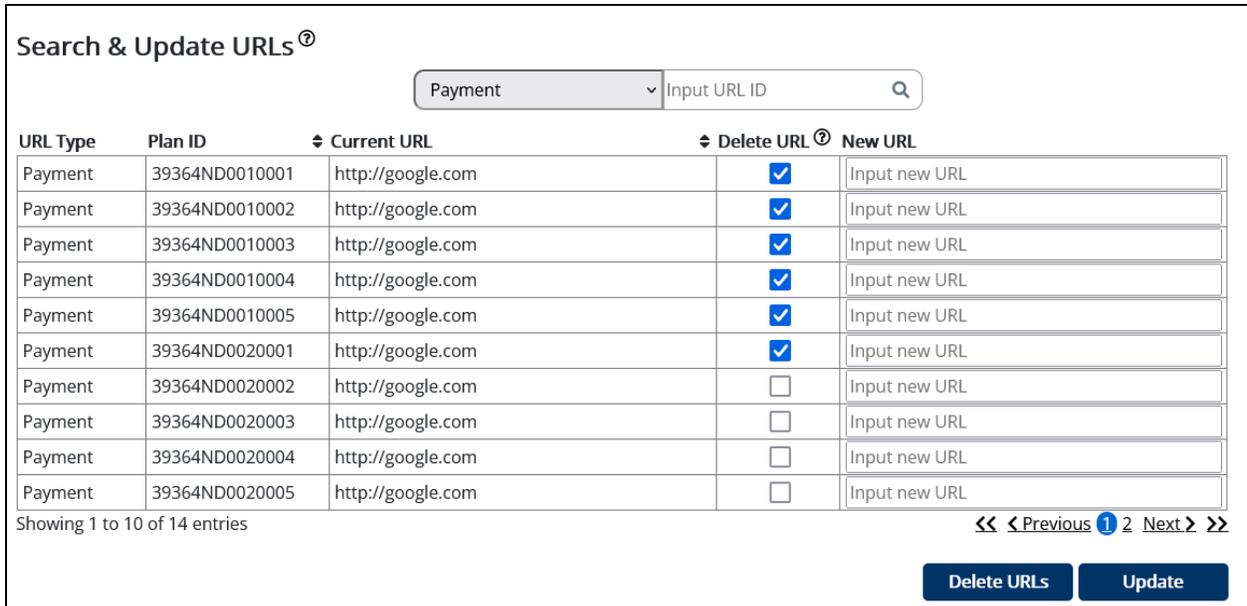


Figure 4-33: Delete URL Checkboxes

4.2.3.12 Delete URLs Delete Pop Up - All URL types except SBC & Formulary

Select the **Delete URLs** button to delete URLs. A confirmation pop-up will appear listing the URLs being deleted in the search results table to confirm deletion.

The user may select the **Delete URLs** button to delete URLs or the **Cancel** button if they determine they do not want to delete these URLs, as shown in Figure below.

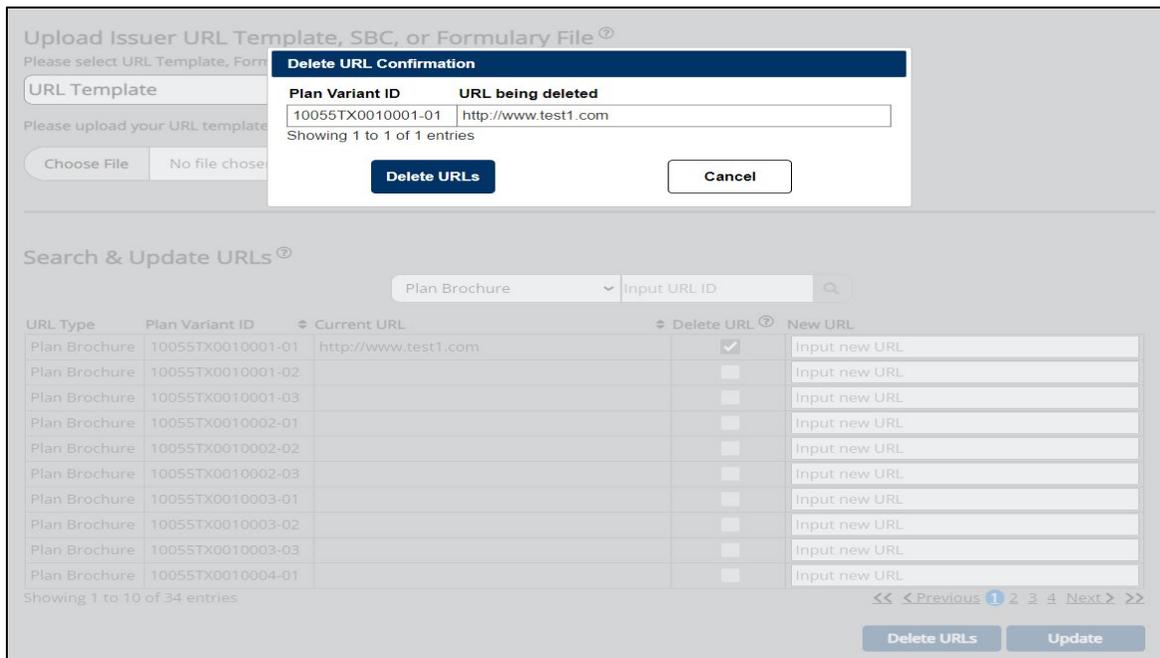


Figure 4-34: URL Delete Pop Up for all URL types except Formulary & SBC

4.2.3.13 Delete URLs for all URL types except Formulary & SBC – Updates Successful

A **Delete Banner** will appear when the URL(s) have been successfully deleted. The page will refresh, and URLs that were deleted will no longer appear in the **Current URL** column.

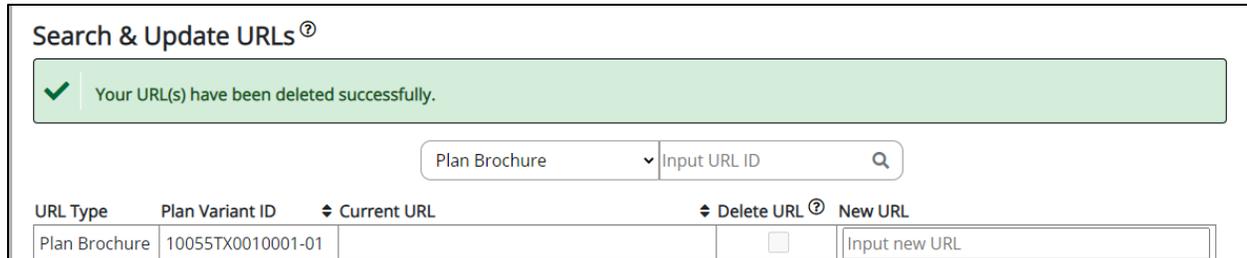


Figure 4-35: URL Deleted Successful Banner for all URL Types except Formulary & SBC

4.2.3.14 Delete URL & File Delete Pop Up – Formulary & SBC

Select the **Delete URLs** button to delete the URLs and files linked to the URLs. A confirmation pop-up will appear listing the URLs and files being deleted in the search results table to confirm deletion.

The user may select the **Delete** button to delete the URLs and files or the **Cancel** button if they determine they do not want to delete these URLs and files, as shown in Figure below.

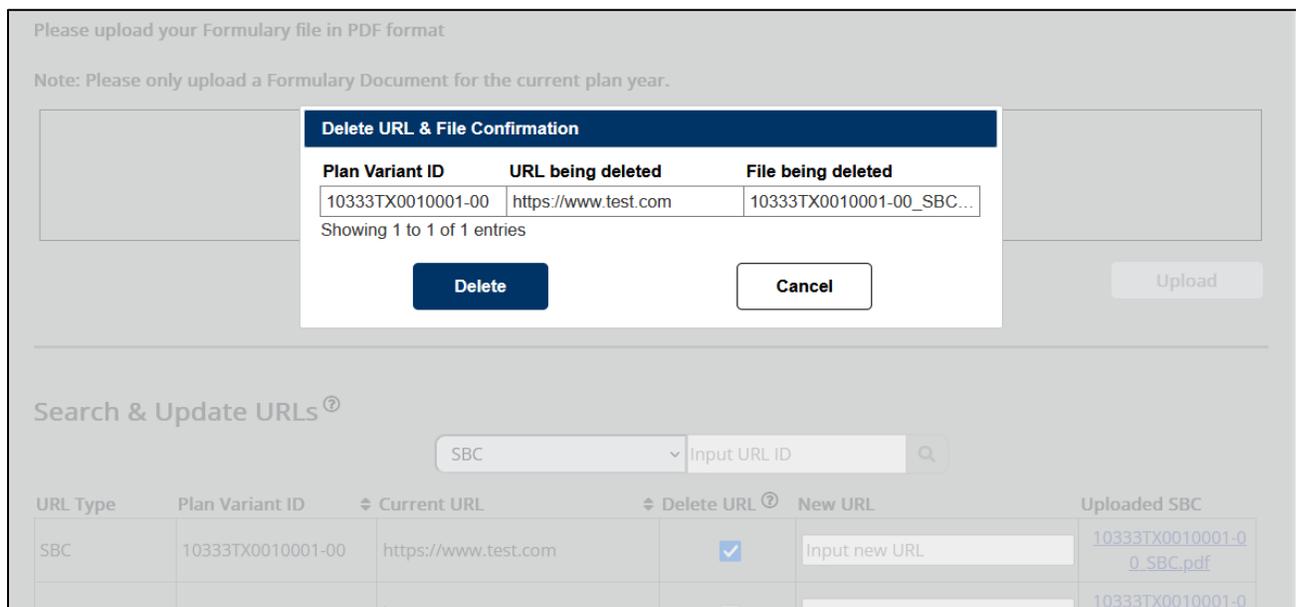


Figure 4-36: URL & File Delete Pop Up for SBC & Formulary

4.2.3.15 Delete URLs Formulary & SBC – Updates Successful

A **Delete Banner** will appear when the URLs and files have been successfully deleted. The page will refresh, and URLs that were deleted will no longer appear in the **Current URL** column.

Files that were deleted will no longer appear in the **Uploaded SBC or Uploaded Formulary** column.

Search & Update URLs [?]

✓ Your URL(s) and file(s) have been deleted successfully.

SBC
Input URL ID
🔍

URL Type	Plan Variant ID	↕ Current URL	↕ Delete URL [?]	New URL	Uploaded SBC
SBC	10333TX0010001-00		<input type="checkbox"/>	<input type="text" value="Input new URL"/>	
SBC	10333TX0010001-01	https://www.test.com	<input type="checkbox"/>	<input type="text" value="Input new URL"/>	10333TX0010001-01_SBC.pdf
SBC	10333TX0010001-02	https://www.test.com	<input type="checkbox"/>	<input type="text" value="Input new URL"/>	10333TX0010001-02_SBC.pdf

Figure 4-37: URL & File Deleted Successful Banner for Formulary & SBC

4.3 Interoperability Data Page

The Interoperability Data page allows users to submit their Interoperability attestations and is divided into three main sections: the **Introduction** section, the **Attestation and Documentation of Compliance: Patient Access API** section, and the **Justification** section.

Figure below shows the Interoperability Data page.

Note: Interoperability Data Page will only be shown when the FFE or SPE Issuer has submitted a Medical Individual PB template. This page will not show for SBE-FP and SBE Issuers.

Plan Management Supplemental Submission
Plan Year: 2023
FUNC02 | Logout

10333 - TEST 14.0 - TX
URL Data

[User Guide \[PDF, 1.04 MB\]](#)

Interoperability Compliance Web Form

Introduction:

Instructions:
 This program attestation will evaluate your compliance with the requirements finalized in the Interoperability and Patient Access Final Rule published on May 1, 2020. The requirements are detailed in 45 Code of Federal Regulations (CFR) 156.221, and include the implementation and maintenance of a patient access application programming interface (API) and related documentation.

If you issue plans on the Federally-facilitated Exchanges, including in a state performing plan management functions, submit this form in the Supplemental Submissions Module (SSM) as part of your Qualified Health Plan Application in the Health Insurance Oversight System (HIOS). Please refer to the PY2023 Issuer Instructions for further detail. This form is not required for stand-alone dental plans, Federally-facilitated Small Business Health Options Programs, and State-based Exchanges on the Federal platform.

You must respond to the questions below to attest to your compliance with each requirement. If you respond "no" to any attestation, you must submit a narrative justification at the end of the form.

Please note: CMS has opted to employ enforcement discretion for 45 CFR 156.221(f), known as the payer-to-payer data exchange provision. Enforcement of the payer-to-payer data exchange requirement is delayed and will not be incorporated in QHP certification for PY 2023. Additional information on interoperability requirements and enforcement can be found on the QHP Certification website: <https://www.qhpcertification.cms.gov/interoperability>

Attestation and Documentation of Compliance: Patient Access API

The purpose of the following questions is to assess issuer compliance with the requirements of 45 CFR 156.221 as introduced in the Interoperability and Patient Access Final Rule.

* **Question 1:** Has the issuer fully implemented a secure API that both:

- a. Allows all enrollees to access their claims and encounter information through a third-party application of the enrollee's choice and
- b. Meets the standards of Health Level 7® (HL7) Fast Healthcare Interoperability Resources® (FHIR) Release 4.0.1?

Yes
 No

* **Question 2:** Has the issuer ensured inclusion of all information detailed in 45 CFR 156.221(b) in the content made accessible via the API?

Yes
 No

* **Question 3a:** Has the issuer published on an easily accessible website and/or through publicly accessible hyperlink(s) information to support third party application use of the API, as detailed in 45 CFR 156.221(d)?

Yes
 No

Question 3b: Provide an active URL or URLs demonstrating compliance with Question 3a.

1.
2.

* **Question 4a:** Has the issuer published educational resources about health information privacy and security, including the information detailed in 45 CFR 156.221(g), on a website easily accessible to enrollees?

Yes
 No

Question 4b: Provide an active URL or URLs demonstrating compliance with Question 4a.

1.
2.

Justification

If the response to any of the preceding questions was "No" or there was no response provided, please provide a narrative justification that contains the following information:

- The date (a single date specifying month, day, and year) by which all referenced requirements in questions 1-4 will be fully implemented.
- A description of how the non-implemented requirements will impact enrollees until such time as they are fully implemented. Specifically, detail what functionality, data elements, or guidance will not be accessible to enrollees until full implementation is achieved. Also, describe how enrollees currently access all health information maintained by the issuer until full implementation is achieved.
- Details of the root cause for implementation delay and the issuer's plan for completing implementation by the stated date.
- Specify whether the issuer is new to the Exchange for PY 2023.

Input Justification Here

Figure 4-38: Interoperability Data Page

4.3.1 Submit Interoperability Data – Successful Submission

A **Success Banner** will appear when the Interoperability updates have passed validation and have been saved. The page will refresh, and data entered will be saved on the page.

The screenshot displays the 'Plan Management Supplemental Submission' interface for Plan Year 2023. The user is logged in as 'FUNCO2' and is viewing the 'Interoperability Data' page for '39364 - Test Insurance Company - ND'. The page has two tabs: 'Interoperability Data' (selected) and 'URL Data'. A success banner at the top of the main content area reads: 'Your Interoperability changes were loaded successfully.' Below the banner, there is an 'Introduction' section followed by 'Instructions'. The instructions state that the program attestation will evaluate compliance with requirements finalized in the Interoperability and Patient Access Final Rule published on May 1, 2020. It details requirements in 45 Code of Federal Regulations (CFR) 156.221, including implementation and maintenance of a patient access application programming interface (API) and related documentation. It also notes that if plans are issued on Federally-facilitated Exchanges, the form should be submitted in the Supplemental Submissions Module (SSM) as part of a Qualified Health Plan Application in the Health Insurance Oversight System (HIOS). A note at the bottom mentions that CMS has opted to employ enforcement discretion for 45 CFR 156.221(f), known as the payer-to-payer data exchange provision, which is delayed for PY 2023. A link to the QHP Certification website is provided: <https://www.qhpcertification.cms.gov/s/Interoperability>. A 'User Guide [PDF, 1.04 MB]' link is also visible in the top right corner of the content area.

Figure 4-39: Interoperability Updates Success Banner

4.3.2 Interoperability Data Page – Unsubmitted Changes Pop Up

A confirmation pop-up will appear to confirm user wants to navigate away from Interoperability Data Page if they have not successfully submitted their changes yet.

The user may select the **Yes** button to navigate away without changes being saved or the **No** button if they determine they do not want to navigate away, as shown in Figure below.

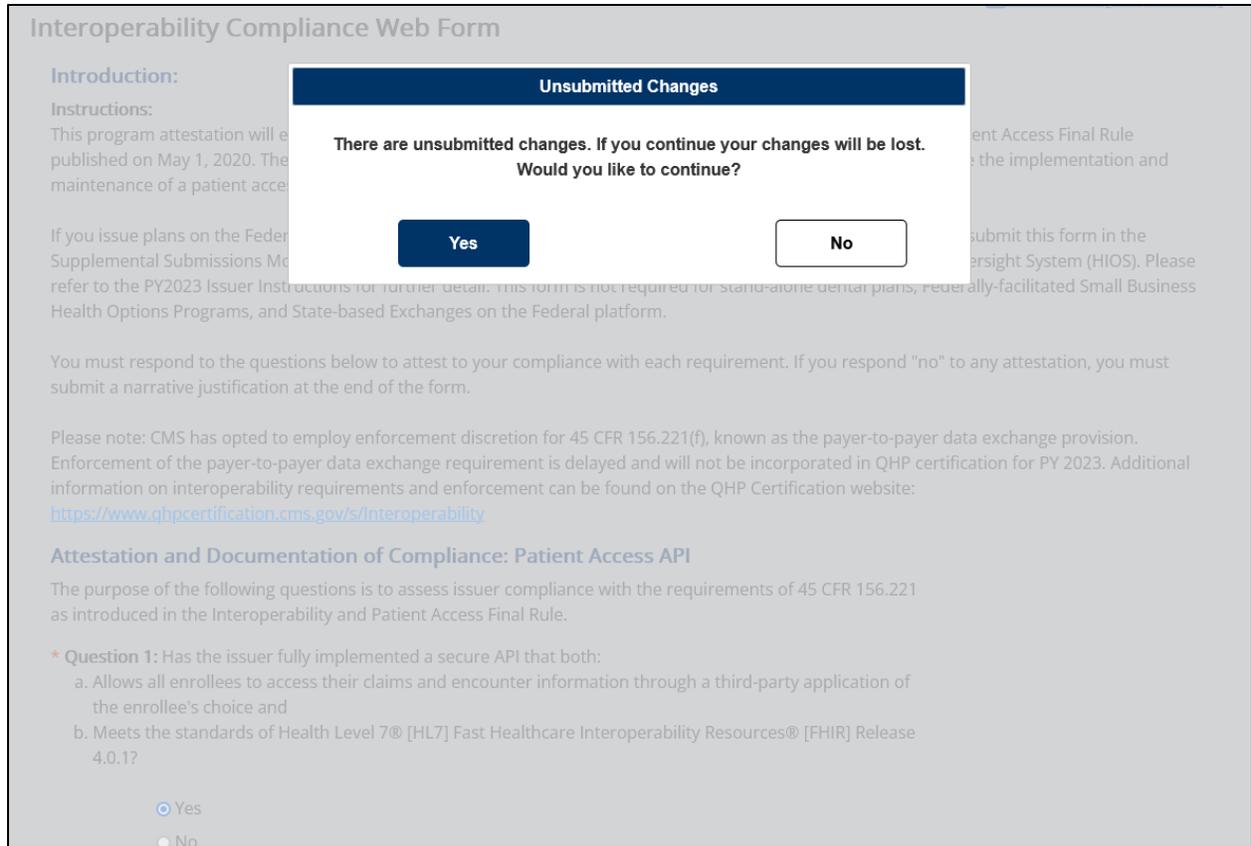


Figure 4-40: Interoperability Unsubmitted Changes Pop Up

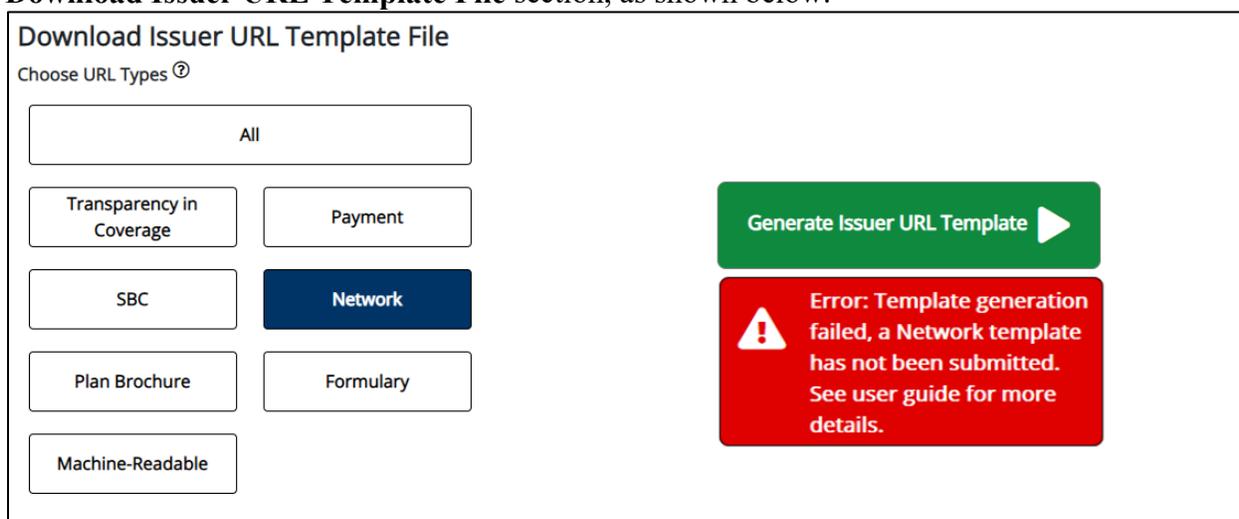
5 Troubleshooting & Support

The *Supplemental Submission Module* provides detailed error messaging to assist the user with troubleshooting and resolving issues. Further details are provided below.

5.1 URL Data Page – Troubleshooting and Support

5.1.1 Download Issuer URL Template File Error Messages

The user can receive an error when attempting to generate an **Issuer URL Template** file in the **Download Issuer URL Template File** section, as shown below.



The screenshot shows the 'Download Issuer URL Template File' interface. It features a 'Choose URL Types' section with several buttons: 'All', 'Transparency in Coverage', 'Payment', 'SBC', 'Network' (which is highlighted in dark blue), 'Plan Brochure', 'Formulary', and 'Machine-Readable'. To the right of these buttons is a green button labeled 'Generate Issuer URL Template' with a play icon. Below the green button is a red error message box with a white warning triangle icon. The error message reads: 'Error: Template generation failed, a Network template has not been submitted. See user guide for more details.'

Figure 5-1: Issuer URL Template Generation Error

Table below provides a list of possible error messages the user may encounter in the **Download Issuer URL Template File** section, as well as corrective actions to resolve the issue.

Table 5-1: Download Issuer URL Template Error Messages

Error Message	Corrective Action
Error: Template generation failed. Please retry or contact the Help Desk.	Please refresh the browser and if the error persists, contact the Help Desk for more details. Contact information is listed in section 5.4 .
Error: Template generation failed. Please select at least one URL type and retry.	The user should select at least one URL Type in order to successfully generate an Issuer URL Template .
Error: Template generation failed, a PB template has not been submitted. See user guide for more details.	The user should confirm that a valid Plans and Benefits template has either been submitted to the <i>Benefits and Service Area Module</i> or transferred by the State via <i>SERFF</i> .
Error: Template generation failed, a Network template has not been submitted. See user guide for more details.	The user should confirm that a valid Network template has either been submitted to the <i>Benefits and Service Area Module</i> or transferred by the State via <i>SERFF</i> .

Error Message	Corrective Action
Error: Template generation failed, a Prescription Drug template has not been submitted. See user guide for more details.	The user should confirm that a valid Prescription Drug template has either been submitted to the <i>Benefits and Service Area Module</i> or transferred by the State via <i>SERFF</i> .

5.1.2 Upload Issuer URL Template File Error Messages

The user can receive an error message when attempting to upload an **Issuer URL Template** file. Refer to Table below for a list of the possible error messages, as well as the corrective action required to allow the user to submit successfully.

Table 5-2: Upload Issuer URL Template Error Messages

Error Message	Corrective Action
Error: Invalid file type selected. Please select a .csv file.	The user will receive this error message when the document uploaded is not a .csv file. Please select only a .csv file and reupload.
Error: Invalid file name. The file name must contain only alphanumeric characters, hyphens, underscores, and/or periods.	The user should update the file name to only include the acceptable characters listed in the error message. See section 4.2.2.1 for the list of acceptable characters.
Error: Invalid file name. Please restrict file name to less than 100 characters.	The user should update the file name to be less than or equal to 100 characters in length, then reupload.
Error: The uploaded template did not have an Issuer ID or was invalid.	The user should confirm that the first row of the Issuer URL Template contains a valid HIOS Issuer ID, and that the ID matches the Issuer ID chosen from the Summary page.
Error: This template has data that is inconsistent with your privileges.	The user will receive this error message when the Issuer URL Template uploaded contains a HIOS Issuer ID that does not match the Issuer ID selected on the Summary page. The user should either select the appropriate HIOS Issuer ID from the Summary page or correct the HIOS Issuer ID in the Issuer URL Template , then re-submit.

Error Message	Corrective Action
<p>Error: Invalid .csv format. Please conform .csv to the proper format.</p>	<p>There are 3 possible causes for this error:</p> <ol style="list-style-type: none"> 1. The first row of the Issuer URL Template does not contain the HIOS Issuer ID. Please update the Issuer URL Template to add the HIOS Issuer ID. 2. Column headers are not within the 2nd, 3rd, or 4th rows of the .csv file. Please update the Issuer URL Template to have the headers in the same row and within the 2nd, 3rd, or 4th rows. 3. File does not contain the 8 necessary column headers: <ol style="list-style-type: none"> a. URL Type b. URL ID c. Market Type d. Product Type e. Current URL f. New URL g. Current Technical POC Email h. New Technical POC Email <p>Please update the Issuer URL Template to contain all 8 column headers in exact order.</p>
<p>Error: No new URLs entered. Please enter at least one URL in the New URL column and resubmit.</p>	<p>File does not contain a value in the New URL column. The user should enter at least one URL update and re-submit for validation.</p>
<p>Error: Encountered issues saving to database. Please try again in a few minutes. If this error persists, please contact CMS Support.</p>	<p>The user should wait a few minutes and retry upload of Issuer URL Template. If this problem persists, the user should then contact CMS Support.</p>

5.1.3 Upload SBC & Formulary File Error Banner Messages

Upload Issuer URL Template, SBC, or Formulary File [Ⓢ]

Fields marked with a red asterisk (*) are required.

Please select URL Template, Formulary, or SBC from the dropdown.

SBC

Please select the SBC file(s) you would like to upload. You may upload a Zip file with multiple PDF files or an individual PDF file. Please use the following naming format for each SBC file: [PlanVariantID]_SBC.pdf. (Example: 12345MD0010001-01_SBC.pdf).

Note: SBC files are only required for Medical Plan Variants. Please only upload SBC Documents for the current plan year.

✘ Error: Invalid file name. The filename must contain only alphanumeric characters, hyphens, underscores, and/or periods.

Add File
Select .zip or .pdf file

Drag file here or [choose from folder](#)

Figure 5-2: SBC File Error Banner for Invalid Characters

Table 5-3: Upload SBC & Formulary File Error Messages

Error Message	Corrective Action
Error: Invalid file name. The filename must contain only alphanumeric characters, hyphens, underscores, and/or periods. Note: This error banner will also be present for Formulary file upload.	The user will receive this error message when the document uploaded contains invalid characters. Please select only upload a file with valid characters and reupload.
Error: Invalid file name. Please restrict file name to less than 100 characters. Note: This error banner will also be present for Formulary file upload.	The user will receive this error message when the document uploaded contains over 100 characters. Please select only a file under 100 characters and reupload.

5.1.4 Search & Update URLs Error Messages

When the user attempts to submit an invalid URL through the search results table, an Error Banner will appear. The banner will contain the message “Please correct the following errors:” followed by the list of errors as shown in Figure below.

Search & Update URLs[®]

✘ Please correct the following errors:

Note: No URL updates were stored. Please correct the invalid URLs highlighted in red and re-submit all URL updates.

1. Invalid URL format for Plan ID 10333TX0010001: URL value does not meet required specifications. Please confirm URL begins with either 'http://' or 'https://'.
2. Invalid URL format for Plan ID 10333TX0010003: URLs cannot contain spaces.
3. Invalid URL format for Plan ID 10333TX0020001: URLs cannot contain commas.
4. Invalid URL format for Plan ID 10333TX0020003: URLs cannot contain > (greater than) character.
5. Invalid URL format for Plan ID 10333TX0030001: URLs cannot contain < (less than) character.
6. Invalid URL format for Plan ID 10333TX0030002: URLs cannot contain -- (two consecutive hyphens) characters.
7. Invalid URL format for Plan ID 10333TX0040001: URLs cannot contain ' (single quote) character.
8. Invalid URL format for Plan ID 10333TX0040003: URLs must be formatted to meet security requirements. Acceptable format - https://host.name-here.com/path?q=query

Payment

URL Type	Plan ID	↕ Current URL	↕ Delete URL [?]	New URL
Payment	10333TX0010001		<input type="checkbox"/>	url.com
Payment	10333TX0010003		<input type="checkbox"/>	http://url com
Payment	10333TX0020001		<input type="checkbox"/>	http://url,com
Payment	10333TX0020003		<input type="checkbox"/>	http://url>com
Payment	10333TX0030001		<input type="checkbox"/>	http://url<com
Payment	10333TX0030002		<input type="checkbox"/>	http://url--com
Payment	10333TX0040001		<input type="checkbox"/>	http://url'com
Payment	10333TX0040003		<input type="checkbox"/>	http://host=name?here.com

Showing 1 to 8 of 8 entries

Figure 5-3: URL and Email Updates Errors Banner

Table below describes the validations for URLs and Emails submitted through the **New URLs** column of the search results table.

- URL Errors for Network, Formulary, SBC, Plan Brochure, and Payment URLs will begin with “Invalid URL format for [Formulary, Network, Plan, or Plan Variant] ID [URL ID]:”
- URL Errors for Transparency URLs will begin with “Invalid URL format for Issuer ID [Issuer ID]:”
- URL Errors for Machine-Readable URLs will begin with “Invalid URL format for Machine-Readable URL:”

Table 5-4: Search & Update URLs – Validations and Error Messages

Validation	Banner Error Message
URLs entered must begin with either “http://” or “https://” for all URL Types except Machine-Readable	URL value does not meet required specifications. Please confirm URL begins with either 'http://' or 'https://'.
Machine-Readable URL entered must begin with “https://”	URL value does not meet required specifications. Please confirm URL begins with 'https://'.

Validation	Banner Error Message
URLs entered cannot contain a space within the string	URLs cannot contain spaces.
URLs entered cannot contain a comma within the string	URLs cannot contain commas.
All On-Exchange Network IDs must have a new or current Network URL value	Network URL value is required for all Network IDs associated to On-Exchange plans. Please submit a Network URL for this Network ID.
Issuer ID must have a new or current Transparency in Coverage URL value when submitting Network URLs	A Transparency in Coverage URL value is required for the Issuer ID. Please submit a Transparency in Coverage URL for Issuer ID [Issuer ID] before updating Network URLs.
Issuer ID must have a new or current Machine-Readable URL value when submitting Network URLs or before submitting a Technical POC Email	A Machine-Readable URL value is required for the Issuer ID. Please submit a Machine-Readable URL for Issuer ID [Issuer ID] before updating Network URLs.
All On-Exchange Formulary IDs must have a new or current Formulary URL value	A Formulary URL value is required for all Formulary IDs associated to On-Exchange plans. Please submit a Formulary URL for this Formulary ID.
All On-Exchange Medical Plan Variant IDs must have a new or current Summary of Benefits URL value	A Summary of Benefits and Coverage URL value is required for all On-Exchange Medical Plan Variant IDs. Please submit a Summary of Benefits and Coverage URL for this Plan Variant ID.
URLs entered cannot contain more than 600 characters within the string	URLs must be less than or equal to 600 characters.
URLs entered cannot contain > greater than symbol within the string	URLs cannot contain > (greater than) character.
URLs entered cannot contain < less than symbol within the string	URLs cannot contain < (less than) character.
URLs entered cannot contain two consecutive hyphens -- within the string	URLs cannot contain -- (two consecutive hyphens) characters.
URLs entered cannot contain ' single quote within the string	URLs cannot contain ' (single quote) character.
URLs must be formatted to meet security requirements	URLs must be formatted to meet security requirements. Acceptable format - https://host.name-here.com/path?q=query."

Validation	Banner Error Message
URLs entered cannot contain certain Unicode characters	<p>URLs cannot contain certain Unicode characters, please refer to the user guide for allowed characters.”</p> <p>Allowed Unicode characters:</p> <ul style="list-style-type: none"> • ~ • ` • ! • @ • # • \$ • % • ^ • & • * • (•) • - • + • = • [•] • \ • { • } • • ; • : • " • . • / • ?
Issuer ID must have a new or current Technical POC Email value when submitting a Machine-Readable URL	A Technical POC email is required for the Issuer ID. Please submit a Technical POC email for Issuer ID [Issuer ID].
Machine-Readable URL entered must end with “.json”.	Invalid URL format for Machine-Readable URL: URL value does not meet required specifications. Please confirm URL ends with '.json'.
Technical POC Email must contain an @ sign.	Invalid Email format for Technical POC Email: Email value does not meet required specifications. Please include an @ (at sign) in your email.
Technical POC Email must be 200 characters or less.	Invalid Email format for Technical POC Email: Email value does not meet required specifications. Please restrict email length to be less than or equal to 200 characters.
Technical POC Email can only contain certain special characters.	Invalid Email format for Technical POC Email: Email value does not meet required specifications. The only allowed special characters are @ (at sign); . (period); - (dash); and _ (underscore).

5.2 Interoperability Data Page – Troubleshooting and Support

5.2.1 Interoperability Data Page Question Errors

Table below describes the validations for the questions submitted through the **Interoperability Data Page**.

Table 5-5: Interoperability Data Page Question Errors

Validation	Error Message
All questions must be answered before clicking the Submit button	Error: Please select a value

5.2.2 Interoperability URL Error Messages

Table below describes the validations for URLs submitted through the **Interoperability Data Page**.

Table 5-6: Interoperability Data Page URL Errors

Validation	Error Message
URLs entered must begin with either "http://" or "https://"	URLs must begin with 'http://' or 'https://'.
URLs entered cannot contain a space within the string	URLs cannot contain spaces.
URLs entered cannot contain a comma within the string	URLs cannot contain commas.
URLs entered cannot contain more than 600 characters within the string	URLs must be less than or equal to 600 characters.
URLs entered cannot contain > greater than symbol within the string	URLs cannot contain > (greater than) character.
URLs entered cannot contain < less than symbol within the string	URLs cannot contain < (less than) character.
URLs entered cannot contain two consecutive hyphens -- within the string	URLs cannot contain -- (two consecutive hyphens) characters.
URLs entered cannot contain ' single quote within the string	URLs cannot contain ' (single quote) character.
URLs must be formatted to meet security requirements	URLs must be formatted to meet security requirements. Acceptable format - https://host.name-here.com/path?q=query

Validation	Error Message
URLs entered cannot contain certain Unicode characters	<p>URLs cannot contain certain Unicode characters, please refer to the user guide for allowed characters.</p> <p>Allowed Unicode characters:</p> <ul style="list-style-type: none"> • ~ • ` • ! • @ • # • \$ • % • ^ • & • * • (•) • - • + • = • [•] • \ • { • } • • ; • : • " • . • / • ?

5.2.3 Interoperability Justification Error Messages

Table below describes the validations for the Justification section submitted through the **Interoperability Data Page**.

Table 5-7: Interoperability Data Page Justification Errors

Validation	Error Message
Justification must be filled in if user selected "No" to any of the questions on Interoperability Data Page	User must enter a Justification when they select "No" for any of the question above.
Justification must be filled in if user did not enter at least one URL for questions 3b or 4b	User must enter a Justification when they don't have at least 1 URL for 3b or 4b.

Validation	Error Message
Justification section has a special character that is not allowed	<p>The only allowed characters are the following:</p> <ul style="list-style-type: none"> • Alphanumeric • Periods • Commas • Double Quotation Marks • Hyphens • Parenthesis ()

5.3 Special Considerations

Upload of the **Issuer URL Template** file is restricted in the following ways:

1. Users will only be able to choose one **Issuer URL Template** file per submission for validation and storage.
2. Users will only be able to submit one **Issuer URL Template** file every 8 seconds.
3. The uploaded **Issuer URL Template** file size cannot exceed 5 MB.
4. The uploaded **Issuer URL Template** must be in .csv format.

5.4 Support

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

Table 5-8: 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: Using the Issuer URL Template in Excel

This appendix provides user instructions on how to open the **Issuer URL Template (.csv)** file in Excel, adjust the column widths to view all pertinent information, and use filters to easily find and update URL data in the file.

How to open the .csv file as an Excel sheet:

1. Navigate to the URL Data page and generate an **Issuer URL Template** file. Select the ***Download Issuer URL Template*** button.

The screenshot shows a web interface for generating and downloading an Issuer URL Template. At the top right, there is a link for 'User Guide [PDF, 1.04 MB]'. Below this is a dark blue warning banner with a white exclamation mark icon and the text: 'Issuers must have State authorization for all QHP data changes. Issuers must check with the applicable State and comply with all requirements prior to submitting any URL changes. By submitting a URL change, you are attesting that the change(s) have been approved by the applicable State.' Below the warning is the heading 'Download Issuer URL Template File' and the text 'Choose URL Types' with a help icon. There is a large white button labeled 'All'. Below it are several smaller buttons: 'Transparency in Coverage', 'Payment', 'SBC', 'Network', 'Plan Brochure', and 'Formulary'. At the bottom left is a button labeled 'Machine-Readable'. On the right side, there is a green button labeled 'Generate Issuer URL Template' with a white play icon. Below that is a dark blue button labeled 'Download Issuer URL Template' with a white download icon and the text 'Generated 12/03/2021 11:25 AM'.

Figure 5-4: Generated Issuer URL Template File

2. If working in Google Chrome, begin by finding the file and moving it to a secure location.

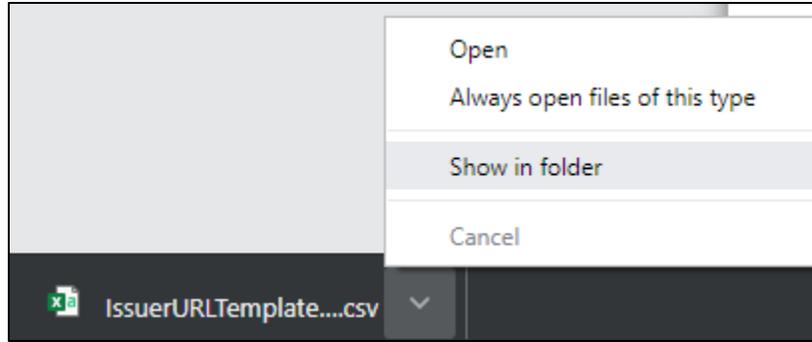


Figure 5-5: Opening as Excel from Google Chrome Download 1 of 2

For mouse users, open the **Context Menu** by right clicking on the file. For keyboard users, open the **Context Menu** by pressing **Shift + F10**. Navigate to the *Open with* field and select *Excel*.

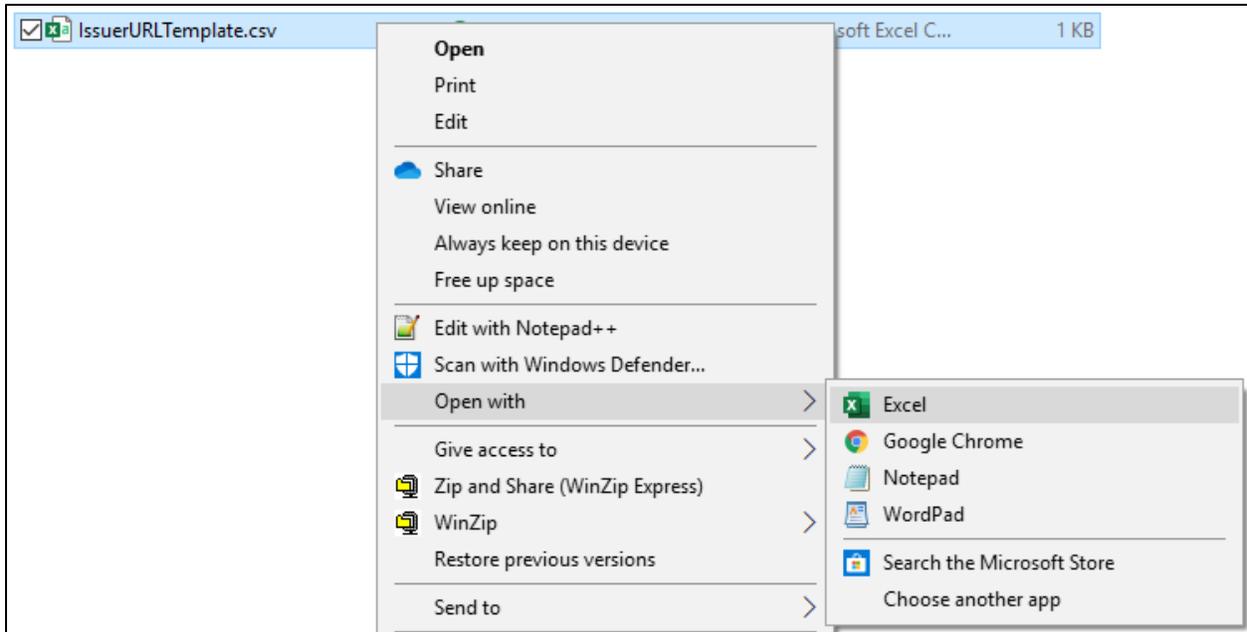


Figure 5-6: Opening as Excel from Google Chrome Download 2 of 2

3. If working in Mozilla Firefox, select the *Open with* radio button and select *Excel*.

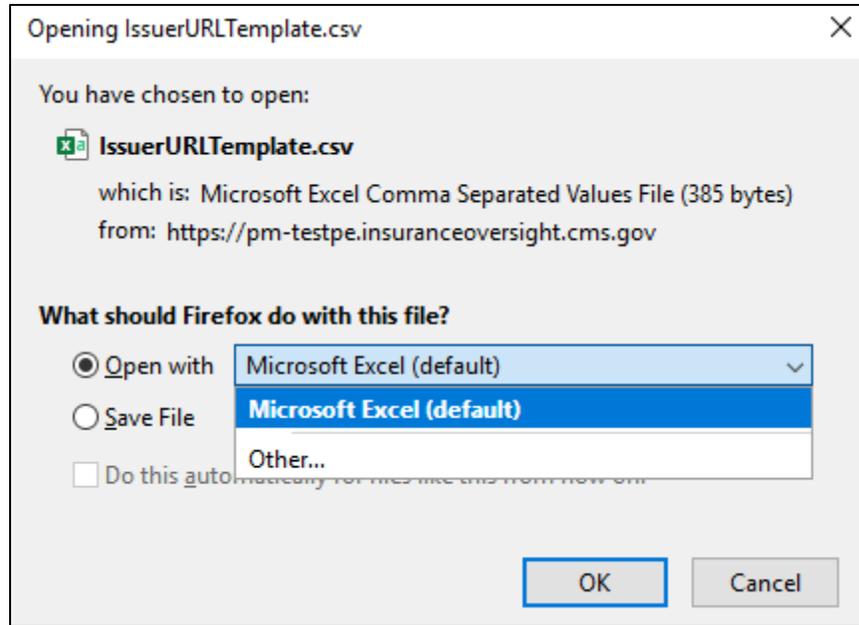


Figure 5-7: Opening as Excel from Mozilla Firefox Download

4. If working in Edge, begin by finding the file, selecting Show in folder, and moving it to a secure location.



Figure 5-8: Opening as Excel from Edge Download 1 of 2

Once *Save as* is selected, the file explorer will appear on your computer. Change the **Save as type:** file to *Excel Comma Separated Value File (*.csv)*.

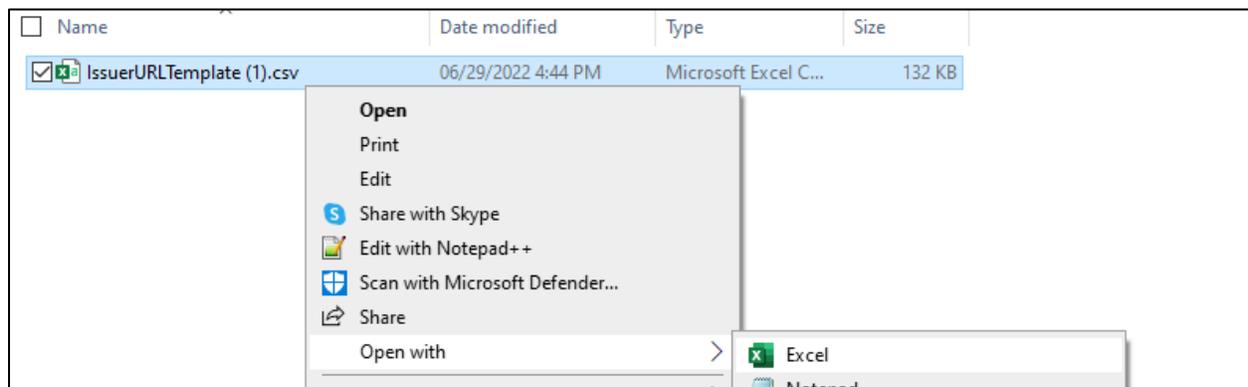


Figure 5-9: Opening as Excel from Edge Download 2 of 2

How to expand columns to view data more easily:

1. Open the downloaded **Issuer URL Template** file in Excel.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	HIOS Issuer ID:	10333													
2	GENERATED 2021-12-03T11:26:04														
3	URLs can be edited only with the New URL column (cannot be changed by making edits to the Current URL column). For more details and instructions please reference the user guide that can be downloaded from the UI.														
4	URL Type	URL ID	Market Type	Product Type	Current URL	New URL	Current Technical POC Email	New Technical POC Email							
5	Machine-Readable	10333	N/A	N/A											
6	Transparency in Coverage	10333	N/A	N/A			N/A	N/A							
7	Summary of Benefits and C	10333TX0C	N/A	N/A			N/A	N/A							
8	Summary of Benefits and C	10333TX0C	N/A	N/A			N/A	N/A							
9	Summary of Benefits and C	10333TX0C	N/A	N/A			N/A	N/A							
10	Summary of Benefits and C	10333TX0C	N/A	N/A			N/A	N/A							
11	Plan Brochure	10333TX0C	N/A	N/A			N/A	N/A							
12	Plan Brochure	10333TX0C	N/A	N/A			N/A	N/A							
13	Plan Brochure	10333TX0C	N/A	N/A			N/A	N/A							
14	Plan Brochure	10333TX0C	N/A	N/A			N/A	N/A							
15	Payment	10333TX0C	N/A	N/A			N/A	N/A							
16	Payment	10333TX0C	N/A	N/A			N/A	N/A							

Figure 5-10: Issuer URL Template Default View

2. Directions for mouse users.
3. Navigate to the Excel column labels **B**, **C**, **D**, and **E**.

Mouse users can double click the grey line to the right of each letter to Auto-Fit the column to the maximum text length in the file.

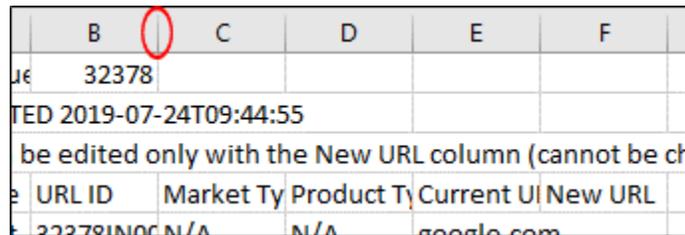


Figure 5-11: Columns to Adjust

Directions for keyboard users.

1. Select any cell in the Excel sheet.
2. Expand the selection to the current region (using **Ctrl + Shift + 8**)
3. Type **Alt + H** to select the Home tab of the Excel ribbon.
4. Type **O** to select the Format.
5. Type **I** to select “autofit column width”.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T
1	HIOS Issue	10333																		
2	GENERATED 2021-12-03T11:26:04																			
3	URLs can be edited only with the New URL column (cannot be changed by making edits to the Current URL column). For more details and instructions please reference the user guide that can be downloaded from the UI.																			
4	URL Type	URL ID	Market Ty	Product Ty	Current UI	New URL	Current Tr	New Technical	POC Email											
5	Machine-f	10333	N/A	N/A																
6	Transpare	10333	N/A	N/A			N/A	N/A												
7	Summary	10333TX0010001-01	N/A	N/A			N/A	N/A												
8	Summary	10333TX0010001-02	N/A	N/A			N/A	N/A												
9	Summary	10333TX0010001-03	N/A	N/A			N/A	N/A												
10	Summary	10333TX0010003-00	N/A	N/A			N/A	N/A												
11	Plan Broc	10333TX0010001-01	N/A	N/A			N/A	N/A												
12	Plan Broc	10333TX0010001-02	N/A	N/A			N/A	N/A												
13	Plan Broc	10333TX0010001-03	N/A	N/A			N/A	N/A												
14	Plan Broc	10333TX0010003-00	N/A	N/A			N/A	N/A												
15	Payment	10333TX0010001	N/A	N/A			N/A	N/A												
16	Payment	10333TX0010003	N/A	N/A			N/A	N/A												

Figure 5-12: One Column Width Set to Fit Text

How to set up filters in the **Issuer URL Template**:

Mouse Users:

1. Select all the data starting from the Column Headers row down to the last row of data. (e.g. in Figure 33, Rows 4-20 and Columns A-E would be selected.)
2. Select the **Data** tab.
3. Click on the **Filter** button.
4. The filter dropdown will be applied for each column.
5. Click on the arrows now present next to the Column Headers and select/deselect desired filter options.

Keyboard Users:

1. Select all the data starting from the Column Headers row down to the last row of data. (e.g. in Figure 33, Rows 4-20 and Columns A-E would be selected.)
2. Type **Alt + A** to select the Home tab of the Excel ribbon.
3. Type **T** to select the **Filter** button in the Cells sub-area.
4. The filter dropdown will be applied for each column.
5. Navigate to the desired Column Header Filter and press **Left Alt + ↓ shortcut**.
6. The filter dropdown will appear pre-populated with the applicable data for that column. Use the dropdown to select/deselect desired options to filter.

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	HIOS Issuer ID:	10333											
2	GENERATED 2021-12-03T11:26:04												
3	URLs can be edited only with the New URL column (cannot be changed by making edits to the Current URL column). For more details and instructions please reference the user guide that can be downloaded from the UI.												
4	URL Type	URL ID	Market Type	Product Type	Current URL	New URL	Current Technical POC Email	New Technical POC Email					
5	Machine-Readable	10333	N/A	N/A									
6	Transparency in Cover	10333	N/A	N/A			N/A	N/A					
7	Summary of Benefits : 10333TX0010001-01		N/A	N/A			N/A	N/A					
8	Summary of Benefits : 10333TX0010001-02		N/A	N/A			N/A	N/A					
9	Summary of Benefits : 10333TX0010001-03		N/A	N/A			N/A	N/A					
10	Summary of Benefits : 10333TX0010003-00		N/A	N/A			N/A	N/A					
11	Plan Brochure	10333TX0010001-01	N/A	N/A			N/A	N/A					
12	Plan Brochure	10333TX0010001-02	N/A	N/A			N/A	N/A					
13	Plan Brochure	10333TX0010001-03	N/A	N/A			N/A	N/A					
14	Plan Brochure	10333TX0010003-00	N/A	N/A			N/A	N/A					
15	Payment	10333TX0010001	N/A	N/A			N/A	N/A					
16	Payment	10333TX0010003	N/A	N/A			N/A	N/A					

Figure 5-13: Issuer URL Template File with Expanded Columns and Filters

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	HIOS Issuer ID:	10333											
2	GENERATED 2021-12-03T11:26:04												
3	URLs can be edited only with the New URL column (cannot be changed by making edits to the Current URL column). For more details and instructions please reference the user guide that can be downloaded from the UI.												
4	URL Type	URL ID	Market Type	Product Type	Current URL	New URL	Current Technical POC Email	New Technical POC Email					
5	Machine-Readable	10333	N/A	N/A									
6	Transparency in Cover	10333	N/A	N/A			N/A	N/A					
7	Summary of Benefits : 10333TX0010001-01		N/A	N/A			N/A	N/A					
8	Summary of Benefits : 10333TX0010001-02		N/A	N/A			N/A	N/A					
9	Summary of Benefits : 10333TX0010001-03		N/A	N/A			N/A	N/A					
10	Summary of Benefits : 10333TX0010003-00		N/A	N/A			N/A	N/A					
11	Plan Brochure	10333TX0010001-01	N/A	N/A			N/A	N/A					
12	Plan Brochure	10333TX0010001-02	N/A	N/A			N/A	N/A					
13	Plan Brochure	10333TX0010001-03	N/A	N/A			N/A	N/A					
14	Plan Brochure	10333TX0010003-00	N/A	N/A			N/A	N/A					
15	Payment	10333TX0010001	N/A	N/A			N/A	N/A					
16	Payment	10333TX0010003	N/A	N/A			N/A	N/A					

Figure 5-14: Filter Dropdown

Appendix B: Acronyms and Abbreviations

Table 5-9: Acronyms and Abbreviations

ACRONYM	Literal Translation
CCIIO	Center for Consumer Information and Insurance Oversight
CMS	Centers for Medicare & Medicaid Services
FFE	Federally Facilitated Exchange
HHS	Health and Human Services
HIOS	Health Insurance Oversight System
ID	Identifier
MSD	Marketplace Service Desk
PM	Plan Management
QHP	Qualified Health Plan
SBC	Summary of Benefits and Coverage
SERFF	System for Electronic Rates and Form Filing
UI	User Interface
URL	Uniform Resource Locator

Appendix C: Glossary

Table 5-10: Glossary

Term	Definition
User	An individual who accesses the application. A user's access is controlled by assigned roles and entitlements (responsibilities).

Appendix D: Referenced Documents

The Center for Consumer Information and Insurance Oversight (CCIIO) has provided additional information detailing specific policy and submission criteria for each section of the *Supplemental Submission Module* on the CCIIO webpage. Please use the following link for more information:

<https://www.qhpcertification.cms.gov/s/QHP>