



DATE: May 2, 2011

TO: Issuers of Health Insurance

FROM: Doug Pennington
Division Director, Healthcare.gov Plan Finder

SUBJECT: HIOS and CMP Templates Now Available For June Refresh

This memo is to inform issuers of major medical insurance in the individual and small group markets that updated HIOS and CMP templates are now available for the June 2011 refresh of the HealthCare.gov Plan Finder.

Issuers may now log in to the HIOS and CMP tools to obtain the updated templates. As a reminder, **the next data submission window is Monday, May 16 – Friday, May 20, 2011.**

A training session on the updated HIOS and CMP data submission templates will take place on **Wednesday, May 4, 2011, between 2-3:30 p.m. ET.** Training will be via Webinar and conference call. Additional details on how to log into the training session will be provided in an upcoming memo.

HIOS Template Updates

All issuers must download a new HIOS template. Changes to the template include:

- **New Marketing Name Field:** Issuers that utilize a marketing name may identify it in the new “Issuer Marketing Name” field, within the Issuer General Information tab.
- **New Association Field:** A field has been added to the Product Information tab to identify whether a product entered on the Issuer Data Entry Form is an association product. Users may choose either “Yes” or “No” in the “Association Product?” field. This is a required field, which must be populated with one of these values. Please note: the value “Association” has been removed from the “Product Type” field.
- **New “Open/Closed” Field:** The “Opt Out of Phase 2?” has been replaced with “Open or Closed?” field. Issuers must identify for each product whether it is open or closed to new enrollment. If the user selects “Closed,” a closed reason must be identified within the “Closed Reason” field. If an appropriate reason does not appear for the product, choose “Other” and provide a brief explanation of why the product is closed in the “Other Closed Reason” field.
- **New Grandfathered Product Field:** A field to identify grandfathered products has been added to the Product Information tab. The user will have a choice of either “Yes” or “No” in the “Grandfathered Product?” field. This is a required field that must be populated with one of these values.

Please note that all issuers must update their products' number of applications received, number of applications denied, and number of up-rated applications, based on the first quarter of calendar year 2011 (January 1 to March 31, 2011). In addition, enrollments should be updated as of March 31, 2010. Submissions will be suppressed from the Plan Finder if updated application data are not reported.

CMP Template Updates

An updated benefit template (Version 3) will be utilized for the June refresh data submission period for Plan Finder. The updated Excel templates include the addition of an "Effective date" and an "End date" field in the column headings. All of the benefit categories below the column headings remain unchanged.

The logic for the dates has been included in the web form and rate templates as well. Effective date logic has been added to the "Enter Portal Plans" page so that an error message will appear if there is overlapping or gaps in coverage when updating plans.

Any plans that are cloned for different date-based rates on the "Portal Plans" page will be highlighted in yellow. In addition, any plans added to the "Portal Plans" page will appear in the rate and benefit template highlighted in yellow.

As a reminder, we will hold a training session on the updated templates on **Wednesday, May 4, 2011, from 2-3:30 p.m. ET**. Additional details on how to log into the training session will be provided in an upcoming memo.

For policy questions regarding the HealthCare.gov Plan Finder, please email OCIOPlanFinder@hhs.gov.

For technical assistance regarding product-level data submissions, please contact the HIOS Help Desk at 1-877-343-6507 or insuranceoversight@hhs.gov.

For technical assistance regarding plan-level data submissions, please contact the CMP Help Desk at 1-877-425-3708 or cmp-support@ehealth.com.