

Medicaid and CHIP

**MAC**

*Learning Collaboratives*

# Federally Facilitated Marketplace Eligibility & Enrollment Learning Collaborative

Account Transfer Schematron Update

October 2, 2014

12-12:30pm ET

**URL:** <https://manatt.webex.com/manatt/onstage/g.php?t=a&d=283053360>

**Event Password:** Transfer1

**Dial:** 1-866-922-3257

**Passcode:** 514849#

# Agenda

- ▶ Motivation for Changes
- ▶ Schematron Fixes to Account Transfer Business Services Definition (BSD) Version 2.3.2
- ▶ Exchange Eligibility for Inbound Transfers
- ▶ Availability of Updated Artifacts
- ▶ State Testing Availability

## Motivation for Changes

# Motivation for Changes

- Recent integration testing with FFM and a few states uncovered potential problems with Inbound transfers (from states to FFM) that could result in *many* failures.
- Some so-called “inbound only” rules need to distinguish between:
  - *State-initiated Inbound* transfers
  - *Outbound Responses (OBR)* – state’s deferred response to previously sent Outbound Requests from FFM
- Confusion about Exchange Eligibility

# Schematron Fixes to Account Transfer Business Services Definition (BSD) Version 2.3.2

# Schematron Variable Addition

- **\$is-inbound** = either state-initiated or OBR
  - e.g., use of nillables still applies in either case
- ***\$is-inbound-not-OBR*** = state-initiated only

## Technical example:

```
<sch:assert test="$is-inbound or matches(., '^[\\d\\-]+$')">      nc:TelephoneNumberFullID  
must contain only numbers and hyphens.      </sch:assert>
```

```
<sch:assert test="not($is-inbound-not-OBR) or matches(., '^\\d+$')">  
nc:TelephoneNumberFullID must contain only numbers.  
</sch:assert>
```

# Schematron Fixes – Inbound vs. OBR vs. Outbound

R11, S31 AT Release Notes (Section 2.4)	Currently Applies to			<b>*Will Now Apply to</b>		
	Inbound	OBR	Outbound	Inbound	OBR	Outbound
1. Made Address data elements required for Primary Contact, regardless of value of Contact Preference Code...	Yes	Yes	Yes	Yes	*No	*No
2. Modified constraints on nc:TelephoneNumberFullID to disallow hyphens (inbound transfers only)	Yes	Yes	No	Yes	*No	No
3. Added rule requiring hix-core:InsuranceApplicantParentAverageHoursWorkedPerWeekValue be between one and three digits in length (inbound transfers only)	Yes	Yes	No	Yes	*No	No
4. Modified multiple rules to bring Schematron into alignment with rules specified in mapping spreadsheet: a) Added rule requiring that hix-ee:EligibilityInconsistencyReasonText be three-digit number (inbound transfers only)	Yes	Yes	No	Yes	*No	No

# Schematron Fixes – Inbound vs. OBR vs. Outbound

(continued)

R11, S31 AT Release Notes (Section 2.4)	Currently Applies to			<b>*Will Now Apply to</b>		
	Inbound	OBR	Outbound	Inbound	OBR	Outbound
5. Modified constraint on hix-ee:ReferralActivityEligibilityReasonReference to make it required for inbound transfers, and to require it to point to hix-ee:ExchangeEligibility element	Yes	No	No	Yes (no change)	No (no change)	No (no change)
6. Added rule requiring that hix-core:ResponseCode length be between four and eight	Yes	Yes	Yes	<b>*Yes, but change to <u>1 to 8</u> chars.</b>	<b>*Yes, but change to <u>1 to 8</u> chars.</b>	<b>*Yes, but change to <u>1 to 8</u> chars.</b>

Note: Although there is no change needed regarding the rule in row 5, it is listed here simply because it refers to state-initiated inbound transfers.

\*Asterisk (text in red) denotes change from the AT BSD 2.3.2 Schematron.

Inbound = state-initiated inbound request (from state to FFM)

OBR = Outbound Response is state's deferred response to previous Outbound Request from FFM; OBR is sent from state to FFM

Outbound = outbound request from FFM to state



# Change to Submission and Creation Date

- Reverting to BSD **2.3** behavior
  - Otherwise OBR with nc:DateTime would fail and states would need to remove Time portion from payload originally sent from FFM
- Applies only to
  - hix-core:ApplicationSubmission and hix-core:ApplicationCreation
- hix-core:ApplicationSubmission/nc:ActivityDate may contain any DateRepresentation child (nc:Date, nc:DateTime, nc:Year, etc.)
- hix-core:ApplicationCreation/nc:ActivityDate may contain any DateRepresentation child (nc:Date, nc:DateTime, nc:Year, etc.)
- Either or both of the above might have no Date child (i.e., empty nc:ActivityDate)
- Note: Current **2.3.2** version *requires* nc:Date child for both of these elements (as stated in Sprint 31 AT release notes)

## Exchange Eligibility for Inbound Transfers

# Exchange Eligibility - Inbound

- FFM indicated no eligibility details are needed for state-initiated Inbound transfers. States need only send:
  - *Empty* ExchangeEligibility element with an s:id; not nillable
  - In the ReferralActivity section, ReferralActivityEligibilityReasonReference must reference (via s:ref) the ExchangeEligibility with the matching s:id

```
<hix-ee:ExchangeEligibility s:id="ExchangeEligibility-Mom"/>
.....
.....
.....
<hix-ee:ReferralActivity>
  <nc:ActivityIdentification>
    <nc:IdentificationID>WVB12345678910111211</nc:IdentificationID>
  </nc:ActivityIdentification>
  <nc:ActivityDate>
    <nc:DateTime>2013-05-30T04:00:00</nc:DateTime>
  </nc:ActivityDate>
  <hix-ee:ReferralActivitySenderReference s:ref="SenderMom"/>
  <hix-ee:ReferralActivityReceiverReference s:ref="Receiver"/>
  <hix-ee:ReferralActivityStatus>
    <hix-ee:ReferralActivityStatusCode>Initiated</hix-ee:ReferralActivityStatusCode>
  </hix-ee:ReferralActivityStatus>
  <hix-ee:ReferralActivityEligibilityReasonReference s:ref="ExchangeEligibility-Mom"/>
</hix-ee:ReferralActivity>
```

# Exchange Eligibility - OBR

- Exchange eligibility is not required for OBR's.
- For OBR's the ReferralActivityStatusCode must specify one of the values: "Accepted", "Rejected", "PartiallyRejected", or "ProvisionallyAccepted".
- If Outbound Request from FFM was for a "FullDetermination", the Outbound AT may not contain ReferralActivityEligibilityReasonReference.
- However, the OBR to the "FullDetermination" request must contain ReferralActivityEligibilityReasonReference pointing to the Eligibility the Applicant was assessed eligible or ineligible for.

```
<hix-ee:ReferralActivity>
  <nc:ActivityIdentification>
    <nc:IdentificationID>FFM76453210987654321</nc:IdentificationID>
  </nc:ActivityIdentification>
  <nc:ActivityDate>
    <nc:DateTime>2015-06-01T07:00:00</nc:DateTime>
  </nc:ActivityDate>
  <!-- The 's:ref' attribute references to the 's:id' attribute in 'Sender' and 'Receiver' elements.-->
  <hix-ee:ReferralActivitySenderReference s:ref="Sender"/>
  <hix-ee:ReferralActivityReceiverReference s:ref="Receiver"/>
  <hix-ee:ReferralActivityStatus>
    <hix-ee:ReferralActivityStatusCode>Accepted</hix-ee:ReferralActivityStatusCode>
  </hix-ee:ReferralActivityStatus>
  <hix-ee:ReferralActivityEligibilityReasonReference s:ref="MedicaidNonMAGIEligibility"/>
</hix-ee:ReferralActivity>
```

Not shown

## Availability of Updated Artifacts

# Updated Artifacts in CALT

- Revised Schematron file, eight new samples, and mapping spreadsheet with corresponding updates available:
  - Re-packaged as AT BSD **2.3.2** with all other *unchanged* artifacts (e.g., XML Schema) with October cover date.
  - Document ID = doc84926
  - Revised AT Release Notes will be available shortly, probably 10/03.

## State Testing Availability

# Availability for State Testing

- New Schematron already in IMP1B and IMP1A as of 10/01.
- States may test 2.3.2 in **IMP1A** for the month of October.
- States may continue to use **IMP0** for AT 2.3 in October.
- States may also continue to send production AT 2.3 payloads in PROD during October.
- As currently planned, on (evening of) **10/31/14** all Schematron changes (including those covered in these slides) will be deployed in PROD.
- BSD 2.3 will no longer be available after 10/31.





## Questions & Answers