

Health Insurance Exchange

Qualified Health Plan Enrollee Experience Survey: 2027 Minimum Business Requirements

July 2026

A vendor must fulfill all Minimum Business Requirements (MBR) listed below to apply for consideration to administer the 2027 Qualified Health Plan (QHP) Enrollee Experience Survey (QHP Enrollee Survey) on behalf of QHP issuers. These include requirements related to relevant survey experience, organizational survey capacity, quality control procedures, and approval term.

Relevant Survey Experience

Demonstrated recent experience in fielding patient experience surveys.

Criteria	Vendor Requirements
Number of Years in Business	Minimum of four years.
Organizational Survey Experience	- Minimum of three years' recent experience administering standardized patient experience surveys; all experience within the last five years (2022-2026). - Minimum of three years' recent experience conducting large-scale mixed-mode survey protocols in all three modes (mail/telephone/internet); all experience within the last five years (2022-2026). - Recent experience* administering patient experience surveys for vulnerable populations. - Minimum of two years' recent experience employing a statistical sampling process; count only experience within the last five years (2022-2026). - Recent experience* submitting patient experience survey data to an external third-party organization. - Recent experience complying with CMS-sponsored survey project protocols. Poor past performance on CMS-sponsored survey projects (e.g., not adhering to the timeline and/or survey administration procedures, not adhering to required oversight activities, not adhering to Discrepancy Report procedures and/or corrective actions) will fail to meet minimum business requirements. NOTE: Approval as a vendor in recent years does not guarantee future approval.
Experience with Multiple Survey Languages	- Recent experience administering mail, telephone, and internet surveys in English and Spanish. - Recent experience administering mail and internet surveys in Simplified Chinese and telephone surveys in Mandarin, if opting to administer the 2027 QHP Enrollee Survey in Chinese.

*Experience with polling questions, qualitative data collection, surveys that did not use statistical sampling methods, or Interactive-Voice Response (IVR) surveys is not considered relevant experience for approval.

Organizational Survey Capacity

Capability and capacity to handle the required volume of mail questionnaires and to conduct standardized telephone interviewing and internet surveys in a specified time frame.

Criteria	Vendor Requirements
Capacity to Handle Estimated Workload	- Sufficient physical and personnel resources to administer large-scale outgoing and incoming mail surveys, conduct telephone interviews using an electronic telephone interviewing system, and administer the internet survey during the survey fielding period (e.g., February through May). - Ability for all staff and subcontractors (including remote staff) to conduct all survey-related activities within the Continental United States, Hawaii, Alaska, and U.S. Territories to enable the QHP Enrollee Survey Project Team (Project Team) to conduct all required oversight activities. - Adherence to requirements specified in the <i>Qualified Health Plan Enrollee Experience Survey: Technical Specifications for 2027 (2027 Technical Specifications)</i>.
Personnel	- Designated Project Manager (PM) who is directly employed by the vendor (i.e., not a subcontractor) to oversee all survey operations. The PM's Curriculum Vitae (CV) shows evidence of at least three years' experience in overseeing all functional aspects of survey operations including mail, telephone, internet, data file preparation, and data security; strong background in survey research and methodology; and previous experience leading mixed-mode administration. - Designated Mail Survey Supervisor with a minimum of one year's experience managing large-scale mail survey projects. - Designated Telephone Center Survey Supervisor with a minimum of one year's experience managing large-scale telephone interviewing projects. - Designated Internet Survey Supervisor with a minimum of one year's experience managing large-scale internet survey projects. - Designated Sampling Manager who is directly employed by the vendor (i.e., not a subcontractor) and has a minimum of one year's experience with sample frame development and sample selection. - Designated Information System personnel (i.e., programmers), who are directly employed by the vendor (i.e., not a subcontractor) and have a minimum of one year's experience preparing and submitting data files in a specified format to third-party organization(s). - Sufficient and experienced organizational back-up staff for coverage of key staff.

Criteria	Vendor Requirements
System Resources	• Availability of commercial physical plant and system resources that meet CMS specifications and accommodate the volume of surveys being administered. All system resources are subject to oversight activities, including on-site visits to physical locations and remote quality oversight activities. CMS specifications for a vendor's official business location or a subcontractor's official business location (when applicable), include but are not limited to the following: – Capacity to conduct all survey-related work, including mail and internet survey administration activities and telephone interviewing at the official business location or home-based place of work. – Capacity to reproduce and mail questionnaires, cover letters, and reminder letters at the official business location. – Capacity to process (e.g., scan or key enter) incoming paper surveys at the official business location. – Capacity to program electronic telephone interview systems in accordance with specifications provided and conduct telephone interviews using an electronic telephone interviewing system at the official business location. – Capacity to produce and program the internet survey instrument and all required emails in-house. – Capacity to produce a mobile-ready version of the internet survey in-house. – Capacity to manage concurrent survey projects while maintaining high-quality survey data and response rates. – Capacity to employ an electronic survey management system to track fielded surveys through each stage of the protocol using random, unique de-identified enrollee identification numbers, and interim disposition codes. This electronic management system prevents duplicative records. • Capacity to oversee remote operations and confirm the continued quality control and data security of remote staff if electing to use remote operations for select survey functions (e.g., customer support, telephone interviewing). • Capacity to provide regular progress reports to QHP issuers, within guidelines specified by CMS. • Capacity to maintain a secure work environment for receiving, processing, and storing hardcopy and electronic versions of questionnaires and sample files that protects the confidentiality of survey response data and personally identifiable information (PII). • Capacity to prepare, accommodate, and plan for on-site or remote visits from CMS or the CMS-sponsored Project Team for quality oversight purposes.
Use of Subcontractors (Subject to Approval)	• Receive approval from CMS as part of the vendor application process, or as soon as the need for a subcontractor is identified. • Meet the criteria outlined for the survey administration activities that they will conduct. Subcontracting of sample file generation, email or internet survey administration, and/or data file preparation and submission is not allowed. • Use only a reasonable number of subcontractors for printing, outgoing mail processing, data entry/scanning, and telephone interviewing and/or customer support based on the vendor's estimated number of surveyed enrollees (subject to CMS review).

Criteria	Vendor Requirements
Mixed-Mode Administration	• Responsible for printing, assembling, and mailing survey materials in accordance with the <i>2027 Technical Specifications</i>. • Responsible for programming electronic telephone interviewing systems in accordance with the <i>2027 Technical Specifications</i>. • Responsible for producing and programming the internet survey instrument in accordance with the <i>2027 Technical Specifications</i>. • Comply with all quality oversight requirements described in the <i>2027 Technical Specifications</i>. This includes the submission of sample mail materials, sample telephone scripts and interviewer screen shots, and an internet survey test link and test emails to the Project Team for review prior to survey administration. • Demonstrate ability to collect and accurately process survey data through all phases of survey administration. • Demonstrate experience identifying and contacting nonrespondents for mail and telephone follow-up. • Demonstrate ability to adhere to the survey administration timeline. • Use commercial software/resources to verify that addresses and telephone numbers are updated and correct for all sampled enrollees. • Demonstrate capability to administer the survey in English and Spanish (and Chinese, if applicable). • Assign appropriate disposition codes to each sampled enrollee to indicate final survey status. • Adhere to the Telephone Consumer Protection Act of 1991 (TCPA) requirements set forth by the Federal Communications Commission (FCC). • Demonstrate the ability to implement remote operations while maintaining quality and data security if electing to use remote operations for select survey administration roles (e.g., customer support, telephone interviewing).
Sampling Experience	• Consistent experience in the last five years (2022-2026) selecting random samples based on specific eligibility criteria. • Adequately document statistical approach to drawing a sample. • Demonstrate ability to work with QHP issuer(s) to electronically obtain sample frame(s) for sampling within a specified time frame. • Adhere to all sampling procedures as specified in the <i>2027 Technical Specifications</i>. • Conduct quality checks on sample frame file(s) received from QHP issuer(s) and sampling procedures to verify accuracy and completeness of sample frame information and processes. • Conduct the sampling process in-house and must not subcontract this activity.

Criteria	Vendor Requirements
Data Submission	• Scan or key enter data per protocols detailed in the <i>2027 Technical Specifications</i>. • Adhere to all data preparation and submission rules as specified in the <i>2027 Technical Specifications</i>, including verifying data are de-identified and contain no duplicate cases. • Complete remote identity proofing (RIDP) to register an account in CMS's Identity Management (IDM) system and gain access to the designated QHP Enrollee Survey website by providing required information, including full legal name, social security number, date of birth, current residential address, and personal phone number.* • Submit data electronically to the designated website in the format specified in the <i>2027 Technical Specifications</i>. • Contract and execute Business Associate Agreement(s) with QHP issuer(s) and receive annual authorization from QHP issuer(s) to collect and submit data to CMS on their behalf. • Work with the Project Team to resolve data and data file submission problems within the specified timeframe.
Data Security	• Maintain established electronic security procedures related to access levels, passwords, and firewalls as required by the Health Insurance Portability and Accountability Act (HIPAA) to protect against unauthorized access to electronic files. • Perform daily data back-ups and off-site redundancy procedures that adequately safeguard system data. • Develop a disaster recovery plan for conducting ongoing business operations in the event of a natural or human-related disaster that includes coordination with relevant emergency preparedness systems. • Use required encryption protocols, as applicable, to transmit data files. CMS-defined PII must be transmitted securely (e.g., encrypted file via email, data portal, or Secure File Transfer Protocol). • Implement established procedures for identifying, handling, and reporting breaches of confidential data. • Prepare and submit data via secure methods (HIPAA compliant).
Data Retention	• Retain all data files for a minimum of three years. All data files must be easily retrievable. • Store returned questionnaires in a secure and environmentally safe location, either on-site or using an off-site contractor. • After a minimum of three years, or as otherwise specified by CMS, securely destroy QHP Enrollee Survey-related data files (paper and electronic).
Confidentiality	• Store data files (paper and/or electronic) securely and confidentially in accordance with specified requirements. • Ensure data confidentiality for sampled enrollee PII and survey responses during each phase of the survey process. • Obtain signed confidentiality agreements from staff and subcontractors. • Ensure compliance with all applicable HIPAA Security and Privacy Rules, Protected Health Information (PHI), and PII protocols in conducting all survey administration and data collection activities.

Criteria	Vendor Requirements
Technical Assistance/ Customer Support	- Establish toll-free customer support telephone lines with a live operator during regular vendor business hours and a project-specific customer support email address to accommodate both English and Spanish inquiries throughout the duration of survey fielding. - Accommodate telephone and email inquiries from Chinese-speaking survey participants, if administering the survey in Chinese.

*Vendors requesting electronic access to protected CMS information or systems, including the QHP Enrollee Survey Website, must complete identity proofing. CMS uses the Experian identity verification system to remotely perform identity proofing. CMS uses this information for the purpose of identity verification via Experian **only**. Information will be kept private and will not be shared with any federal or private agency. For more information regarding how CMS uses the information provided, please read the [CMS Privacy Act Statement](#).

Quality Control Procedures

Personnel training and quality control mechanisms employed to collect valid, reliable survey data.

Criteria	Survey Vendor Requirements
Demonstrated Quality Control Procedures	- Establish and document quality control procedures for all phases of survey implementation, as specified in the <i>2027 Technical Specifications</i>: - Internal staff training. - Printing, mailing, and recording receipt of surveys. - Telephone administration of surveys (electronic telephone interviewing system). - Internet administration of surveys. - Adequate monitoring of subcontractor(s), if applicable. - Scanning and coding of survey data. - Preparing final data files for submission. - All other functions and processes that affect the administration of the QHP Enrollee Survey. - Develop and submit annually a Quality Assurance Plan (QAP) for survey administration in accordance with the <i>2027 Technical Specifications</i>. The QAP will provide written evidence of the processes used to collect and process survey data accurately through all phases of fielding. - Accommodate on-site and/or remote visits by CMS and the CMS-sponsored Project Team to the physical business premises on which major operations of survey business are conducted, as specified in the <i>2027 Technical Specifications</i>.
Training Requirements	- After confirmation of conditional approval status, vendor staff must successfully complete QHP Enrollee Survey Vendor Training (September 2026) and Data Submission Training (February 2027). - Successfully complete an evaluation of QHP Enrollee Survey Vendor Training. - Establish in-house training for new staff involved in all aspects of survey administration to ensure compliance with contract training requirements.

Training Participants	• At a minimum, the Project Manager, Mail Survey Supervisor, Sampling Manager, Telephone Center Supervisor, and Internet Survey Supervisor are required to attend the QHP Enrollee Survey Vendor Training. Attendance by vendor staff responsible for data coding and file preparation is strongly recommended. • At a minimum, the Project Manager, Sampling Manager, and Information System personnel are required to attend the Data Submission Training. Attendance by vendor staff responsible for data coding and file preparation is strongly recommended. • Subcontractor attendance is optional for both the QHP Enrollee Survey Vendor Training and Data Submission Training.
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Approval Term

An approved survey vendor may administer the QHP Enrollee Survey for the specified amount of time.

Criteria	Survey Vendor Requirements
Approval Term	• One year.