



Medicare Advantage Prescription Drug (MAPD) Plan Connectivity Checklist

May 13, 2025

Table of Contents

Clicking on each title below will take you to that section.

Introduction.....	3
Overview	3
T1 Connect: Direct.....	4
TIBCO MFT.....	7
Gentran Small Plan Connectivity (<100,000 in Enrollment) (<2 Gigabyte File Sizes.....	11
3 rd Party.....	13

Revision History

Date	Description of Changes	Version	Author
6/24/2021	Final version posted to MAPD Plan Connectivity Preparation page.	1.0	MAPD
6/20/2022	Updated section structure and changes to unify Connectivity Checklist to DEPP.	1.5	MAPD
8/3/2023	Updated verbiage to reflect that electronic PCD signatures are accepted.	2.0	MAPD Connectivity Team
4/11/2024	Added a section for 3 rd Party Connectivity.	2.5	MAPD Connectivity Team
5/13/2025	Updated verbiage for 3 rd Party Connectivity	3.0	MAPD Connectivity Team

Introduction

The purpose of this document is to provide an overview of the steps all Medicare Advantage Prescription Drug (MAPD) Plans (referred to in this document as “Plans”) will follow to establish connectivity to the Centers for Medicare & Medicaid Services (CMS). This document is meant to supplement the Data Exchange Preparation Procedures (DEPP) which can be downloaded from:

<https://www.cms.gov/Research-Statistics-Data-and-Systems/CMS-Information-Technology/mapdhelpdesk/Plan-Connectivity-Preparation>

The scope of this document is to provide the steps for the following connectivity types as shown on the Plan Connectivity Data (PCD) Form:

- [T1 Connect: Direct](#)
- [TIBCO Managed File Transfer \(MFT\)](#)
- [Gentran](#)
- [3rd Party](#)

This document is intended for Plans that will exchange data with CMS as well as entities that will exchange data on the behalf of Plans, such as Third-Party Administrators (TPA).

Please contact the MAPD Help Desk if there are any problems or questions encountered while following the procedures outlined in this document.

MAPD Help Desk:

Phone: 1-800-927-8069

Email: mapdhelp@cms.hhs.gov

Overview

Exchanging information with CMS can be accomplished using different tools and procedures which are dependent on a Plan’s current capabilities and the volume of data to be exchanged. More detailed information can be located in the DEPP at the link above.

Each connectivity type will follow the same general steps:

1. Getting Started.
2. Obtain Security and Access.
3. Establish Data Transfer Protocols.
4. Test Connectivity.

T1 Connect: Direct

Large Plan Connectivity (≥ 100,000 in Enrollment) (≥ 10 Gigabyte File Sizes)

#	Task	Suggested Timeframe
1.	Get Started Please visit the Plan Connectivity Preparation page on the MAPD Help Desk website at the link below to find more detailed instructions in the Data Exchange Preparation Procedure document and the forms referenced in this checklist: https://www.cms.gov/Research-Statistics-Data-and-Systems/CMS-Information-Technology/mapdhelpdesk/Plan-Connectivity-Preparation .	Note: Establishing a new T1 line connection and the associated access can take six (6) to eight (8) weeks to order, schedule, and install. Plans need to take this into consideration if this is the exchange mechanism they plan to use.
<input type="checkbox"/>	1.1 Obtain a contract number from CMS/HPMS. 1.2 Complete the “Request for Server to Server Access to CMS for Enterprise File Transfer (EFT) Corporate Secure Point of Entry (SPOE) ID” Form. This form is located on the MAPD Help Desk website - Plan Connectivity Preparation in the downloads section. Scan and email completed form to the Division of Payment Operations: DPOISSO@cms.hhs.gov . It is optional but recommended to CC MAPDHelp@cms.hhs.gov .	June Week #2 - September Week #2 <i>However, forms can be sent anytime</i>
<input type="checkbox"/>	1.3 Enter Connectivity Data into HPMS Plan Connectivity Data (PCD) Module at https://hpms.cms.gov/app/ng/home/ using your EUA/RACF ID. If you have difficulty logging in or accessing the PCD Module, please contact HPMS at hpms@cms.hhs.gov or 1-800-220-2028. Once data is entered into the PCD Module Plans are required to submit the form within HPMS, select “Create PDF” to download, sign, and email the completed PCD form to the MAPD Help Desk at: MAPDHelp@cms.hhs.gov .	June Week #2 - September Week #2 <i>However, forms can be sent anytime</i>
2.	Obtain Security and Access Please complete the following steps in order. NOTE: At minimum, the Plan must have at least one (1) EPOC and one (1) MA Submitter registered to proceed with the connectivity process.	
<input type="checkbox"/>	2.1 Submit EPOC Designation Letter Template. 2.2 Submit EPOC Access Acknowledgment Form. Both forms can be found on the MAPD Help Desk website - Plan Connectivity Preparation page in the downloads section. Email to DPOEPOC@cms.hhs.gov and CC MAPDHelp@cms.hhs.gov .	September Week #3 <i>However, forms can be sent anytime</i>

<input type="checkbox"/>	<p>2.3 Register EPOC in the Enterprise Portal.</p> <ol style="list-style-type: none"> (1) Navigate to the Enterprise Portal at portal.cms.gov and log in with your IDM User ID OR select 'New User Registration' and create an account (application is MARx – Medicare Advantage & Prescription Drug System). (2) Request the role of EPOC for your Plan contract number(s) or if you already have the role, modify the role to include your new Plan contract number(s). (3) EPOC will receive an email from the CMS Enterprise Portal (donotreply@cms.gov) notifying the user of their role approval. <p>NOTE: For assistance with requesting the role of EPOC, refer to the EPOC Role Request User Guide.</p>	<p>New Contracts will be loaded into IDM around the first weekend in October</p>
<input type="checkbox"/>	<p>2.4 Register MA Submitter and MA Representative in Enterprise Portal</p> <p>Individuals must register at least one MA Submitter for the submission of enrollment files. The MA Representative role is not required but is helpful.</p> <p>Both roles will complete the following steps:</p> <ol style="list-style-type: none"> (1) Navigate to the Enterprise Portal at portal.cms.gov and log in with your IDM User ID OR select 'New User Registration' and create an account (application is MARx – Medicare Advantage & Prescription Drug System). (2) Individuals will request the role of MA Submitter (to submit enrollment files) or MA Representative (acquire access to MARx) for your Plan contract number(s). If you already have the role, modify the role to include your new Plan contract number(s). <p>NOTE: For assistance requesting roles for MARx, refer to the MARx Role Request User Guide.</p> <ol style="list-style-type: none"> (3) EPOCs will receive an email from the Enterprise Portal (donotreply@cms.gov) requesting them to approve the pending role request. (4) Once the pending request is approved, the MA Submitter or MA Representative will receive an email from the Enterprise Portal (donotreply@cms.gov). Refer to the EPOC Role Request User Guide for assistance with role request approval. 	<p>October Week #1</p>
<input type="checkbox"/>	<p>2.5 Register User/Submitters – PDE, RAPS & EDPS</p> <p>All Plans that will exchange Prescription Drug Event (PDE), and/or Risk Adjustment Processing System (RAPS), and/or Encounter Data Processing System (EDPS) data must contact the Customer Service and Support Center (CSSC) Operations Help Desk to complete additional configuration steps. Contact CSSC at 877-534-2722 or CSSCOperations@PalmettoGBA.com.</p>	<p>October Week #1</p>

3. Establish Data Transfer Protocols

Note: Establishing a new T1 line connection and the associated access can take six (6) to eight (8) weeks to order, schedule, and install. Plans need to take this into consideration if this is the exchange mechanism they plan to use.

<input type="checkbox"/>	<p>3.1 Plans with an existing T1 Connect: Direct connection for an established Plan contract number(s) will fill out the appropriate sections of the PCD and return the form to the MAPD Help Desk. Be sure to fill in the following sections:</p> <ul style="list-style-type: none"> • User ID and Password • Mid-Tier Services (mailbox and local node name) or Mainframe (high-level qualifier for production and test, local node name and environment) • TCP/IP (address and port) or SNA (application ID and SNA net ID) <p>Plans should indicate in the email with the PCD form that they have an existing connection.</p> <p>3.2 Once the Plan has an EPOC and MA Submitter in place, the MAPD Help Desk will send a Service Request (SR) to the EFT Team who will add the new plan to the existing connection. The EFT Team or the MAPD Help Desk will reach out if there are any questions or concerns.</p>	<p>August Week #2 - October Week #1</p>
<input type="checkbox"/>	<p>3.3 Plans with an a NEW T1 Connect: Direct Connection</p> <ol style="list-style-type: none"> (1) Obtain CMS Wide Area Network (WAN) Ethernet connection. (2) Download Connect: Direct software. (3) Ensure SPOE ID has been obtained. (4) Construct, test and be ready to submit Plan's Job Control Language (JCL) and procedure (PROC). (5) Notify the MAPD Help Desk that the Plan has completed their setup. (6) The MAPD Help Desk will send a Service Request (SR) to the EFT Team. The EFT Team or MAPD Help Desk will contact the Plan and/or TPA to initiate the setup process and testing. 	<p>August Week #2 – October Week #1</p>
<h3>4. Test Connectivity</h3>		
<input type="checkbox"/>	<p>4.1 Plans with an existing T1 Connect: Direct connection. During the connectivity setup process, the Enterprise File Transfer (EFT) Team will send a file through the T1 Connect: Direct setup. They will verify that the file was transmitted and received by the Plan. This will conclude the testing of connectivity setup.</p> <p>MAPD will email the Plan once set up is complete and the test file has transmitted successfully. Once the email is received, make sure mailbox(es) are established and accessible.</p>	<p>October Weeks #1-3</p>

□	<p>4.2 Plans with a NEW T1 Connect: Direct Connection will follow the following process to test their connection.</p> <ol style="list-style-type: none"> (1) A Verizon representative will review and confirm that the T1 line connection is complete and ready for use. (2) CMS will review and confirm that the Plan security access to the CMS mainframe is complete. (3) The Plan's technical representative will review and confirm that CMS' security access to the Plan's mainframe is complete. (4) The Plan's programmer and CMS' programmer will review and confirm the C:D procedures for sending and receiving file values are correct. (5) The Plan's programmer will submit the job to send a file to the CMS mainframe. (6) A MAPD Help Desk Representative will verify that the file transmitted from the Plan mainframe was successfully received at the CMS mainframe. (7) A CMS programmer will submit the job to send a file to the Plan mainframe. (8) The Plan's programmer will verify that the file transmitted from CMS' mainframe was successfully received. (9) A successful test is complete when a file has been sent from the Plan's mainframe to CMS' mainframe and a file has been sent from the CMS mainframe to the Plan's mainframe. The files being sent and received by CMS and the Plan will be empty or contain canned test (not production) data. CMS EFT will work with the Plan to confirm testing was successful. 	October Weeks #1-3
---	--	--------------------

TIBCO MFT

TIBCO Internet Server (SFTP/ HTTPS) & TIBCO MFT Platform Server

Large and Small Plan Connectivity (enrollment count is limited by files size) (≤ 10 Gigabyte File Sizes)

#	Task	Suggested Timeframe
1.	<p>Get Started</p> <p>Please visit the Plan Connectivity Preparation page on the MAPD Help Desk website at the link below to find more detailed instructions in the Data Exchange Preparation Procedure document and the forms referenced in this checklist:</p> <p>https://www.cms.gov/Research-Statistics-Data-and-Systems/CMS-Information-Technology/mapdhelpdesk/Plan-Connectivity-Preparation.</p>	

<input type="checkbox"/>	<p>1.1 Obtain a contract number from CMS/HPMS.</p> <p>1.2 Complete the “Request for Server to Server Access to CMS for Enterprise File Transfer (EFT) Corporate Secure Point of Entry (SPOE) ID” Form.</p> <p>This form is located on the MAPD Help Desk website - Plan Connectivity Preparation in the downloads section. Scan and email completed form to the Division of Payment Operations: DPOISSO@cms.hhs.gov. It is optional but recommended to CC MAPDHelp@cms.hhs.gov.</p>	<p>June Week #2 - August Week #3 <i>However, forms can be sent anytime</i></p>
<input type="checkbox"/>	<p>1.3 Enter Connectivity Data into HPMS Plan Connectivity Data (PCD) Module at https://hpms.cms.gov/app/ng/home/ using your EUA/RACF ID. If you have difficulty logging in or accessing the PCD Module, please contact HPMS at hpms@cms.hhs.gov or 1-800-220-2028.</p> <p>Once data is entered into the PCD Module, Plans are required to submit the form within HPMS, select “Create PDF” to download, sign, and email the completed PCD form to the MAPD Help Desk at: MAPDHelp@cms.hhs.gov.</p>	<p>June Week #2 - September Week #2 <i>However, forms can be sent anytime</i></p>
<p>2 Obtain Security and Access Please complete the following steps in order. NOTE: At minimum, the Plan must have at least one (1) EPOC and one (1) MA Submitter registered to proceed with the connectivity process.</p>		
<input type="checkbox"/>	<p>2.1 Submit EPOC Designation Letter Template.</p> <p>2.2 Submit EPOC Access Acknowledgment Form.</p> <p>Both forms can be found on the MAPD Help Desk website – Plan Connectivity Preparation page in the downloads section. Email to DPOEPOC@cms.hhs.gov and CC MAPDHelp@cms.hhs.gov.</p>	<p>September Week #3 <i>However, forms can be sent anytime</i></p>

<input type="checkbox"/>	<p>2.3 Register EPOC in the Enterprise Portal.</p> <ol style="list-style-type: none"> (1) Navigate to the Enterprise Portal at portal.cms.gov and log in with your IDM User ID OR select ‘New User Registration’ and create an account (application is MARx – Medicare Advantage & Prescription Drug System). (2) Request the role of EPOC for your Plan contract number(s) or if you already have the role, modify the role to include your new Plan contract number(s). (3) EPOC will receive an email from the CMS Enterprise Portal (donotreply@cms.gov) notifying the user of their role approval. <p>NOTE: For assistance with requesting the role of EPOC, refer to the EPOC Role Request User Guide.</p>	<p>New Contracts will be loaded into IDM around the first weekend in October</p>
<input type="checkbox"/>	<p>2.4 Register MA Submitter and MA Representative in Enterprise Portal</p> <p>Individuals must register at least one MA Submitter for the submission of enrollment files. The MA Representative role is not required but is helpful.</p> <p>Both roles will complete the following steps:</p> <ol style="list-style-type: none"> (1) Navigate to the Enterprise Portal at portal.cms.gov and log in with your IDM User ID OR select ‘New User Registration’ and create an account (application is MARx – Medicare Advantage & Prescription Drug System). (2) Individuals will request the role of MA Submitter (to submit enrollment files) or MA Representative (acquire access to MARx) for your Plan contract number(s). If you already have the role, modify the role to include your new Plan contract number(s). NOTE: For assistance requesting roles for MARx, refer to the MARx Role Request User Guide. (3) EPOCs will receive an email from the Enterprise Portal (donotreply@cms.gov) requesting them to approve the pending role request. <p>Once the pending request is approved, the MA Submitter or MA Representative will receive an email from the Enterprise Portal (donotreply@cms.gov). Refer to the EPOC Role Request User Guide for assistance with role request approval.</p>	<p>October Week #1</p>
<input type="checkbox"/>	<p>2.5 Register User/Submitters – PDE, RAPS & EDPS</p> <p>All Plans that will exchange Prescription Drug Event (PDE), and/or Risk Adjustment Processing System (RAPS), and/or Encounter Data Processing System (EDPS) data must contact the Customer Service and Support Center (CSSC) Operations Help Desk to complete additional configuration steps. Contact CSSC at 877-534-2722 or CSSCOperations@PalmettoGBA.com.</p>	<p>October Week #1</p>

3 Establish Data Transfer Protocols

<input type="checkbox"/>	<p>3.1 TIBCO MFT Internet Server (SFTP/HTTPS)</p> <p>(1) Verify SPOE ID has been obtained. If utilizing the HTTPS 'mailbox' structure, an IDM account must be obtained and a request for the ISV User Role submitted and approved.</p> <p>(2) Obtain and install SFTP Software (if not using HTTPS) and generate a 2018-bit Rivest, Shamir & Adleman (RSA) SSH2 key pair with a passphrase created by the Plan from their server with the connection. Please Note: There are two keys required for SFTP Setup:</p> <p>2.1) RSA 2040bit key par that will be needed for authentication for those using SFTP.</p> <p>2.2) RSA/DSA 2040bit public known host key for the site that EFT will be pushing response files to for the Plan(s).</p> <p>(3) Obtain required firewall/ports:</p> <ul style="list-style-type: none"> • SFTP Port: 11222 (SFTP traffic from Plan to CMS). • SFTP Port: 11022 or 22 (SFTP traffic from CMS to Plan site). • HTTPS site: https://eftp2.cms.hhs.gov:11443/. • HTTPS Port: 11443. <p>(4) Complete and return the EFT Partner Server Form which is located on the MAPD Help Desk website - Plan Connectivity Preparation page in the downloads section. Return to eft_admin@cms.hhs.gov. It is optional but recommended to CC MAPDHelp@cms.hhs.gov.</p>	<p>Suggested Timeframe September Week #4</p>
<input type="checkbox"/>	<p>3.2 TIBCO MFT Platform Server (PS)</p> <p>This option is only for internal connections to the CMS Baltimore Data Center (BDC)/Leidos Managed Data Center (LMDC). For additional information about using this option, please contact the MAPD Help Desk.</p>	<p>Suggested Timeframe September Week #4</p>
<h3>4 Test Connectivity</h3>		
<input type="checkbox"/>	<p>4.1 During the connectivity setup process, the Enterprise File Transfer (EFT) Team will send a file through the connection. They will verify that the file was transmitted and received by the Plan. This will conclude the testing of connectivity set up.</p>	<p>Suggested Timeframe October Weeks #1-3</p>
<input type="checkbox"/>	<p>4.2 MAPD will email the Plan once setup is complete and the test file has transmitted successfully.</p>	<p>Suggested Timeframe October Weeks #1-3</p>

Gentran

Small Plan Connectivity (<100,000 in Enrollment) (<2 Gigabyte File Sizes)

#	Task	Suggested Timeframe
1	Get Started Please visit the Plan Connectivity Preparation page on the MAPD Help Desk website at the link below to find more detailed instructions in the Data Exchange Preparation Procedure document and the forms referenced in this checklist: https://www.cms.gov/Research-Statistics-Data-and-Systems/CMS-Information-Technology/mapdhelpdesk/Plan-Connectivity-Preparation .	
<input type="checkbox"/>	<p>1.1 Obtain a contract number from CMS/HPMS.</p> <p>1.2 <u>Optional step:</u> If you plan to automate using with the Gentran system complete the “Request for Server to Server Access to CMS for Enterprise File Transfer (EFT) Corporate Secure Point of Entry (SPOE) ID”. This form is located on the MAPD Help Desk website - Plan Connectivity Preparation in the downloads section.</p> <p>Scan and email completed form to the Division of Payment Operations: DPOISSO@cms.hhs.gov. It is optional but recommended to CC MAPDHelp@cms.hhs.gov.</p>	<p>Suggested Timeframe June Week #2 - August Week #3 <i>However, forms can be sent anytime</i></p>
<input type="checkbox"/>	<p>1.3 Enter Connectivity Data into HPMS Plan Connectivity Data (PCD) Module at https://hpms.cms.gov/app/ng/home/ with your EUA ID. If you have difficulty logging in or accessing the PCD Module, please contact HPMS at hpms@cms.hhs.gov or 1-800-220-2028.</p> <p>Once data is entered into the PCD Module, Plans are required to submit the form within HPMS, select “Create PDF” to download, sign, and email the completed PCD form to the MAPD Help Desk at: MAPDHelp@cms.hhs.gov.</p>	<p>Suggested Timeframe June Week #2 - September Week #2 <i>However, forms can be sent anytime</i></p>
2	Obtain Security and Access Please complete the following steps in order. NOTE: At minimum, the Plan must have at least one (1) EPOC and one (1) MA Submitter registered to proceed with the connectivity process.	
<input type="checkbox"/>	<p>2.1 Submit EPOC Designation Letter (Template for EPOC Letter).</p> <p>2.2 Submit EPOC Access Acknowledgment form.</p> <p>Both forms found at the MAPD Help Desk website - Plan Connectivity Preparation page in the downloads section. Email to DPOEPOC@cms.hhs.gov and MAPDHelp@cms.hhs.gov.</p>	<p>Suggested Timeframe September Week #3 <i>However, forms can be sent anytime</i></p>

<input type="checkbox"/>	<p>2.3 Register EPOC in the Enterprise Portal.</p> <ol style="list-style-type: none"> (1) Navigate to the Enterprise Portal at portal.cms.gov and log in with your IDM User ID OR select ‘New User Registration’ and create an account (application is MARx – Medicare Advantage & Prescription Drug System). (2) Request the role of EPOC for your Plan contract number(s) or if you already have the role, modify the role to include your new Plan contract number(s). (3) EPOC will receive an email from the CMS Enterprise Portal (donotreply@cms.gov) notifying the user of their role approval. <p>NOTE: For assistance with requesting the role of EPOC, refer to the EPOC Role Request User Guide.</p>	<p>Suggested Timeframe October Week #1</p>
<input type="checkbox"/>	<p>2.4 Register MA Submitter and MA Representative in Enterprise Portal</p> <p>Individuals must register at least one MA Submitter for the submission of enrollment files. The MA Representative role is not required but is helpful.</p> <p>Both roles will complete the following steps:</p> <ol style="list-style-type: none"> (1) Navigate to the Enterprise Portal at portal.cms.gov and log in with your IDM User ID OR select ‘New User Registration’ and create an account (application is MARx – Medicare Advantage & Prescription Drug System). (2) Individuals will request the role of MA Submitter (to submit enrollment files) or MA Representative (acquire access to MARx) for your Plan contract number(s). If you already have the role, modify the role to include your new Plan contract number(s). NOTE: For assistance requesting roles for MARx, refer to the MARx Role Request User Guide. (3) EPOCs will receive email from the Enterprise Portal (donotreply@cms.gov) to approve the role requested. (4) Once the pending request is approved, the MA Submitter or MA Representative will receive email from the Enterprise Portal (donotreply@cms.gov). Refer to the EPOC Role Request User Guide for assistance with role request approval. 	<p>Suggested Timeframe October Week #1</p>
<input type="checkbox"/>	<p>2.5 Register User/Submitters – PDE, RAPS & EDPS</p> <p>All Plans that will exchange Prescription Drug Event (PDE), and/or Risk Adjustment Processing System (RAPS), and/or Encounter Data Processing System (EDPS) data must contact the Customer Service and Support Center (CSSC) Operations Help Desk to complete additional configuration steps. Contact CSSC at 877-534-2722 or CSSCOperations@PalmettoGBA.com.</p>	<p>Suggested Timeframe October Week #1</p>
<p>3 Test Connectivity</p>		
<input type="checkbox"/>	<p>3.1 During the connectivity set up process, the Enterprise File Transfer (EFT) Team will verify that mailboxes are set up.</p>	<p>Suggested Timeframe October Weeks #1-3</p>
<input type="checkbox"/>	<p>3.2 MAPD will email the Plan once set up is complete.</p>	<p>Suggested Timeframe October Weeks #1-3</p>

3rd Party

Varies with vendor, Plan is responsible for discussing options with vendor

#	Task	Suggested Timeframe
1 Get Started This connection type entrusts a 3rd Party vendor for submission of the Plan's documentation. Plan will be responsible for contacting the 3 rd Party vendor to retrieve the files on behalf of the Plan .		
<input type="checkbox"/>	1.1 Plan (Contract holder) must obtain a contract number from CMS/HPMS. 1.2 Plan must utilize their own SPOE ID. If the Parent Organization of the Plan does not have an existing SPOE ID, please complete the form titled: "Request for Server to Server Access to CMS for Enterprise File Transfer (EFT) Corporate Secure Point of Entry (SPOE) ID". This document is located on the MAPD Help Desk website - Plan Connectivity Preparation in the downloads section. Scan and email completed form to the Division of Payment Operations: DPOISSO@cms.hhs.gov . It is optional but recommended to CC MAPDHelp@cms.hhs.gov .	Suggested Timeframe June Week #2 - August Week #3 <i>However, forms can be sent anytime</i>
<input type="checkbox"/>	1.3 Plan must enter Connectivity Data into HPMS Plan Connectivity Data (PCD) Module at https://hpms.cms.gov/app/ng/home/ with your EUA ID. If you have difficulty logging in or accessing the PCD Module, please contact HPMS at hpms@cms.hhs.gov or 1-800-220-2028. Once data is entered into the PCD Module, Plans are required to submit the form within HPMS, select "Create PDF" to download, sign, and email the completed PCD form to the MAPD Help Desk at: MAPDHelp@cms.hhs.gov . 1.4 3rd Party must be selected for the desired connection. Plan must then input the connectivity type that is utilized by the submitting 3rd Party. Plan must also input contact information for the 3rd Party.	Suggested Timeframe June Week #2 - September Week #2 <i>However, forms can be sent anytime</i>
2 Obtain Security and Access Please complete the following steps in order. NOTE: At minimum, Plan must have at least one (1) EPOC and 3rd Party must have one (1) MA Submitter registered to proceed with the connectivity process.		
<input type="checkbox"/>	2.1 Plan must Submit EPOC Designation Letter (Template for EPOC Letter). 2.2 Plan must Submit EPOC Access Acknowledgment form.	Suggested Timeframe September Week #3 <i>However, forms can be sent anytime</i>

	Both forms found at the MAPD Help Desk website - Plan Connectivity Preparation page in the downloads section. Email to DPOEPOC@cms.hhs.gov and MAPDHelp@cms.hhs.gov .	
<input type="checkbox"/>	<p>2.3 Plan must register an EPOC in the Enterprise Portal.</p> <ol style="list-style-type: none"> 1) Navigate to the Enterprise Portal at portal.cms.gov and log in with your IDM User ID OR select 'New User Registration' and create an account (application is MARx – Medicare Advantage & Prescription Drug System). 2) Request the role of EPOC for your Plan contract number(s) or if you already have the role, modify the role to include your new Plan contract number(s). 3) EPOC will receive an email from the CMS Enterprise Portal (donotreply@cms.gov) notifying the user of their role approval. <p>NOTE: For assistance with requesting the role of EPOC, refer to the EPOC Role Request User Guide.</p>	Suggested Timeframe October Week #1
<input type="checkbox"/>	<p>2.4 3rd Party must register an MA Submitter in the Enterprise Portal</p> <p>At least one MA Submitter must be registered for the submission of enrollment files.</p> <p>To submit successfully please have 3rd Party complete the following steps:</p> <ol style="list-style-type: none"> (1) Navigate to the Enterprise Portal at portal.cms.gov and log in with your IDM User ID OR select 'New User Registration' and create an account (application is MARx – Medicare Advantage & Prescription Drug System). (2) Individuals will request the role of MA Submitter (to submit enrollment files) for your Plan contract number(s). If you already have the role, modify the role to include your new Plan contract number(s). <p>NOTE: For assistance requesting roles for MARx, refer to the MARx Role Request User Guide.</p> <ol style="list-style-type: none"> (3) Plan's EPOCs will receive email from the Enterprise Portal (donotreply@cms.gov) to approve the role requested. 	Suggested Timeframe October Week #1
<input type="checkbox"/>	<p>2.5 Once the pending request is approved, the MA Submitter will receive an email from the Enterprise Portal (donotreply@cms.gov). Refer to the EPOC Role Request User Guide for assistance with role request approval.</p>	Suggested Timeframe October Week #1
<input type="checkbox"/>	<p>2.6 Register User/Submitters – PDE, RAPS & EDPS</p> <p>Plan's 3rd Party that will exchange Prescription Drug Event (PDE), and/or Risk Adjustment Processing System (RAPS), and/or Encounter Data Processing System (EDPS) data must contact the Customer Service and Support Center (CSSC) Operations Help Desk to complete additional configuration steps. Contact CSSC at 877-534-2722 or CSSCOperations@PalmettoGBA.com.</p>	Suggested Timeframe October Week #1

3 Test Connectivity		
<input type="checkbox"/>	3.1 During the connectivity set up process, the Enterprise File Transfer (EFT) Team will verify that mailboxes are set up with the 3rd Party .	Suggested Timeframe October Weeks #1-3
<input type="checkbox"/>	3.2 MAPD will email Plan once set up is complete.	Suggested Timeframe October Weeks #1-3