DEPARTMENT OF HEALTH & HUMAN SERVICES
Centers for Medicare & Medicaid Services
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Baltimore, Maryland 21244-1850

DATE: **June 04, 2020**

TO: All Part D Plans

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SUBJECT: **Real-time Beneficiary Eligibility Query (BEQ) for Medicare Advantage and Part D Plans**

This document provides an overview of the Beneficiary on the Cloud (BIC) - Beneficiary Eligibility Query (BEQ) implemented by the Centers for Medicare and Medicaid Services (CMS). It also presents a proposed high-level process for onboarding Medicare Advantage and Part D (MA & Part D) Plans intending to use this service.

This document release will include the following:

1. **Batch Beneficiary Eligibility Query (Batch BEQ)** *(Existing)*
2. **BIC-BEQ Real-time Service** *(New)*
3. **Connectivity to BIC-BEQ**
4. **Next Steps**
5. **Proposed On-Boarding Process for Plans**

1. **Batch Beneficiary Eligibility Query (Batch BEQ)** *(Existing)*

The BEQ is a pre-enrollment query that Medicare Advantage and Part D Plans are required to perform prior to enrolling a beneficiary. The BEQ provides beneficiary information including demographics, entitlement/eligibility, Part D employer subsidy, Low Income Subsidy (LIS), End Stage Renal Disease (ESRD), uncovered months, enrollments, ineligibility due to not lawful presence or incarceration, and Comprehensive Addiction and Recovery Act (CARA) details.

Currently, MA & Part D Plans perform this query by submitting their requests in a batch file via CMS Enterprise File Transfer (EFT). CMS processes the batch files and sends requested beneficiary information in batch response files. Plans also can perform the query online using the Medicare Advantage and Prescription Drug (MARx) System user interface. With the current batch BEQ process, Plans need to wait for one or more hours (up to a day in some situations) to get a response prior to completing beneficiary enrollments.

2. **BIC-BEQ Real-time Service** *(New)*

A real time BIC-BEQ service is now available for utilization by Plans. This service is an alternate to the existing batch BEQ and provides the same information as the batch BEQ process via a RESTful Application Programming Interface (API) over the internet. The service is characterized by the high availability and scalability attributes of the cloud framework and minimizes the wait time between the BEQ and enrollment for a beneficiary. The real-time BIC-BEQ service provides significant opportunities to improve the MA & Part D enrollment process.

The BIC-BEQ will be available alongside the batch BEQ service that Plans already use. Plans have the choice to use either or both BEQ services. The BIC-BEQ would enable Plans to provide real time online services to Medicare beneficiaries.

BIC-BEQ Real time API documentation: https://developer.bic.cms.gov and select "BEQ API".

3. **Connectivity to BIC-BEQ**

BIC-BEQ is a REST API Service accessible through an Amazon API Gateway Endpoint on the Amazon Web Services (AWS) cloud. Plans using the BIC-BEQ API will be on-boarded after approval by CMS. The on-boarding process requires assigning a unique API Key for a plan and whitelisting source Internet Protocol (IP) addresses from which they will access the BIC-BEQ service.

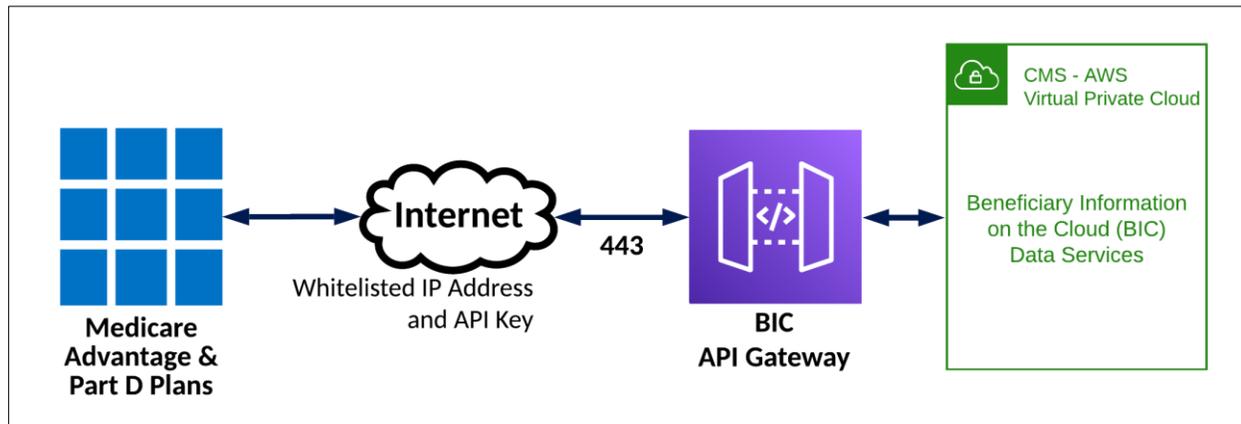Figure 1: Connectivity to BIC-BEQ Service illustrates how a plan will connect to the BIC-BEQ API.

Figure 1: Connectivity to BIC-BEQ Service

4. <u>Next Steps</u>

The Plans shall submit all inquiries to the BIC Operations mailbox BEQ_Distro@cms.hhs.gov via an email<u>, and </u>CMS will coordinate a response.

CMS will provide guidance and support to those Plans who are interested in testing the real time BIC-BEQ as an alternate to batch BEQ. If interested, please go through the on-boarding process outlined in section-6.

5. <u>Proposed On-Boarding Process for Plans</u>

CMS is implementing plan driven onboarding and connection management capabilities to administer the BIC-BEQ. The proposed plan onboarding process includes the following steps.

- Email Technical Point of Contact (TPOC) designation letter to CMS
  The plan must email a scanned official company letter to CMS identifying and appointing a TPOC to coordinate their connection(s) to the BIC-BEQ API. Please note that an organization may submit one letter for all contract numbers and may designate up to two (2) TPOCs for the same (or different) contract numbers for your organization.

  The TPOC designation letter must:
    - Be on original letterhead.
    - Contain all of the following information for each TPOC:
    - Name(s) of designated TPOC
    - Mailing address
    - Telephone number and extension
    - E-mail address
    - Contract number(s) for which the TPOC will approve users (list ALL contract numbers under which this TPOC will approve user access

- contain a signature of the responsible officer of the organization.
- include the name, title, mailing address, e-mail address, and telephone number of the company official signing the letter.

A scanned copy of the TPOC designation letter and TPOC Access Acknowledgement Form should be:

- Emailed to BEQ_Distro@cms.hhs.gov
- The email subject line must follow the format below:
    - TPOC Name
    - Company Name
    - Contract Number(s) – if registering for more than 1, please only enter 1 contract number in subject line
    - Example: Subject: Jane Doe, Company Name, HXXXX

- CMS business owner verifies plan TPOC; reviews and approves onboarding request and forwards the email to BIC Operations team.
- BIC Operations will contact Plan TPOC via email with the BIC API onboarding form. Information to be submitted by the TPOC in the onboarding form will include:
    - Connection Details for each Data Center/ Cloud Platform from which BIC-BEQ will be invoked by the plan
        - Physical Location details– Name, Address, Contact Person Details: Person Name, Phone, Email, Text
        - Source IP Addresses for Servers/ Gateways/ Proxies
        - Anticipated volume of requests per day
- CMS will allow the plan to access the following BIC-BEQ environments
    - Implementation: For testing purposes only. This environment includes production volume De-Identified beneficiary data
    - Production: For production operations
- The Onboarding form submitted by the TPOC must include connection details for both Implementation and Production environments.
- BIC Operations will generate a Unique API Keys for each plan connection/ BIC-BEQ environment and send to the TPOC as an encrypted attachment
- BIC Operations will provide a standard test dataset for the plan to test in the BIC-BEQ implementation environment
- Plan will be able to submit BEQ Requests.

BIC-BEQ Real time API documentation: https://developer.bic.cms.gov and select "BEQ API".