Centers for Medicare & Medicaid Services
CMS Target Life Cycle (TLC)

Transforming Episode Accountability Model (TEAM)

Custom Export Tool Participant User Guide

Version 4.0

3/17/2026

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1. Introduction

The purpose of this user guide is to provide Transforming Episode Accountability Model (TEAM) participants with the information necessary to effectively access and use the TEAM Custom Export Tool (CET) through the Innovation Support Platform (ISP) Expanded Data Feedback Reporting (eDFR) application.

At this time, data custodians listed on the Data Sharing Agreement and Data Request and Attestation (DRA) form can use the **Custom Export Tool** to download (i) the regional-level preliminary target price and spending summary files applicable to the region (i.e. census division) the TEAM participant is in; and (ii) participant-specific preliminary target price files. Contingent on the data types selected in the DRA form, the data custodians may also download (i) historic episode and claims data covering episodes that began on or after January 1, 2022, and have anchor hospitalization discharge dates/anchor procedure end dates on or before December 31, 2024, the baseline period for Performance Year 1; (ii) baseline summary data providing aggregate information on episode spending, winsorization, and exclusions; (iii) monthly raw performance year claims data; and (iv) monthly episode spending summary data. This user guide will be updated as applicable for each release of the TEAM CET.

In the future, the TEAM participant will be able to use this application to download quarterly regional spending and trend reports. Further, this application will also house reconciliation files including episodes, claims, and aggregate reports including reconciliation reports and quality performance reports.

1.1 Overview

The TEAM CET will allow TEAM participants to access data to understand the spending and utilization patterns within the Original Medicare beneficiary population initiating episodes at their hospitals. TEAM participants can also use this data to compare their own spending to regional averages and assess the spending patterns of post-acute care providers. TEAM participants are encouraged to use this data to inform their decision-making as they seek to transform how they deliver care.

2. Getting Started

The following sub-sections describe setup considerations for using the TEAM CET, user access considerations, how to access the tool, and system organization and navigation.

2.1 Cautions & Warnings

The TEAM CET resides within the Expanded Data Feedback Reporting (eDFR) application of the Innovation Support Platform (ISP). Users access the TEAM CET via the Innovation Center (IC) Application within the CMS Enterprise Portal (ePortal).

When signing into the CMS ePortal, the system asks you to agree to the terms and conditions for use of the CMS.gov ePortal, content, and applications. Select the **Terms & Conditions** hyperlink to view the detailed terms and conditions, which explain the penalties and consequences of misusing the system(s) and its contents.

Note*: Screens that display in the system may differ slightly from the sample images used in this document.*

2.2 Set-up Considerations

The TEAM CET is best viewed using Google Chrome, Microsoft Edge (Chromium), Mozilla Firefox, or Apple Safari. For additional setup considerations, refer to Section 2.1 – Set-up Considerations under Getting Started in the PDF version of the CMS Enterprise Portal User Guide.

2.3 User Access Considerations

Approved Data Custodians will access the TEAM CET through the CMS ePortal. Authorized users have access to tools and functionality based on their assigned role. Data Custodians will be assigned the "**Model Participant**" user role.

2.3.1 HIPAA Access Requirements

Throughout your participation in TEAM, you will be able to view and download requested data through this Innovation Support Platform (ISP) Expanded Data Feedback Reporting (eDFR) application. To view requested data, your Data Sharing Agreement (DSA) must be executed, and your Data Request and Attestation (DRA) Form must be completed and up to date. Your hospital will only receive data that is selected on the DRA, and only the Data Custodians listed on the DSA and DRA will be able to access the data in the TEAM CET.

If you have any questions related to the completion of the DSA or DRA Form, please contact the TEAM Help Desk at CMMI_TEAM@cms.hhs.gov for further assistance.

2.4 Accessing the System

The following sub-sections provide instructions on how to gain access to the TEAM CET. There are four steps in gaining access:

1. Registering for an Identity Management (IDM) System account

2. Requesting an IC Application role
3. Requesting access to the TEAM CET
4. Accessing the TEAM CET

If you have any issues requesting access, contact the TEAM Help Desk at CMMI_TEAM@cms.hhs.gov or at 888-734-6433.

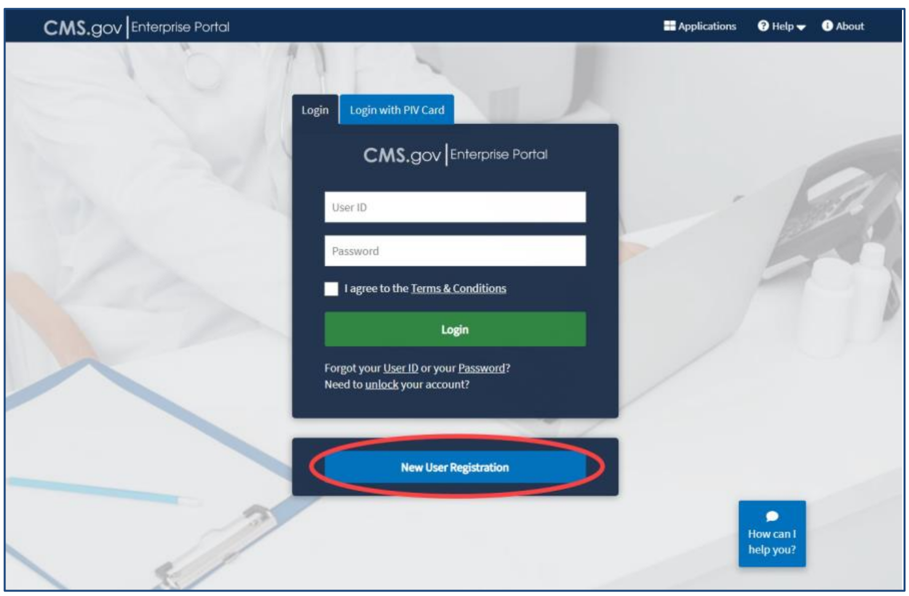
2.4.1 Registering for an Identity Management (IDM) System Account

NOTE: If you already have an IDM account, continue to section 2.4.2 to request an IC Application Role.

To log in to the CMS ePortal **(**https://portal.cms.gov/portal/**)** you need to create a user ID and password by completing the IDM new user registration process. The following are the step-by-step instructions.

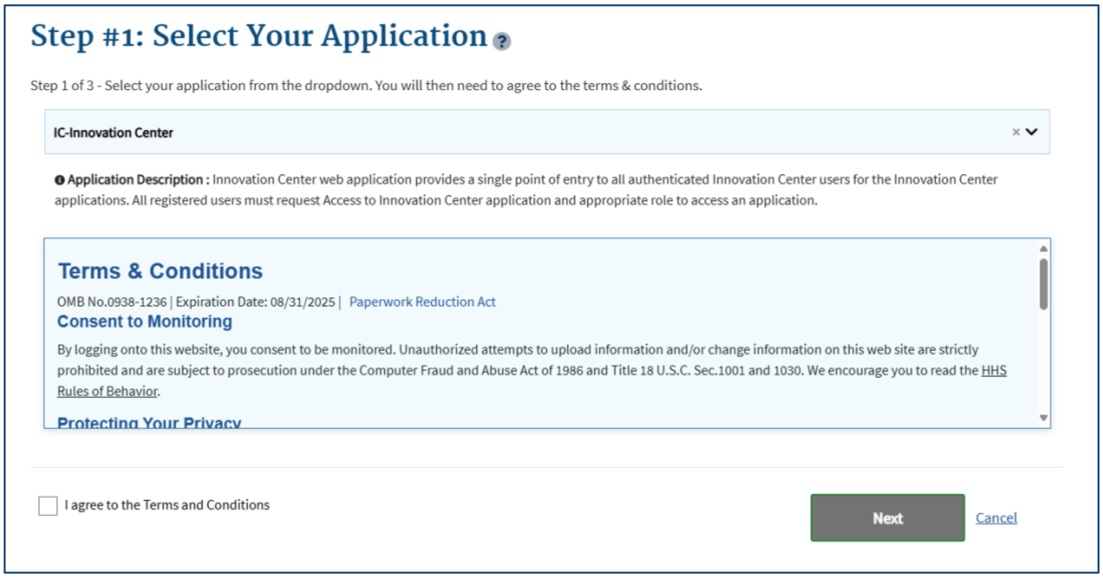
1. On the CMS ePortal home page, click the **New User Registration** button.

Figure 1. New User Registration Button on ePortal Home Page



2. On the **Step #1: Select Your Application** page, select **"IC-Innovation Center"** from the **Select Your Application** drop-down list.

Figure 2. Step 1 of New User Registration – Choose Your Application



3. Read the Terms & Conditions, select **I agree to the Terms and Conditions**, and then click **Next** to continue with the registration process.
4. Provide the information requested on the **Step #2: Register Your Information** page. All fields are required and must be completed unless marked "Optional". After all required information has been provided, click **Next** to continue.
5. On the **Step #3: Create User ID, Password & Security Question/Answer** page:
    a. Create and enter a user ID in the **Enter User ID** field.
    b. Create and enter a password in the **Enter Password** field. Enter the same password in the Enter Confirm Password field.
    c. Select a question in the **Select Your Security Question** drop-down list and enter the answer you want to be saved with the question.
    d. **Note:** Instructions are displayed, in the form of tool tips, on what you are required to include in your user ID, password, and security question answer.
    e. Click **Next** to complete the registration process.
6. The **New User Registration Summary** page displays. Review the information you entered, make any necessary changes and then click the **Submit User** button.
7. The **Confirmation** page is displayed acknowledging your successful registration and informs you that you should receive a confirmation email.

For additional instructions on completing the registration process, refer to *Section 3 – Registering for CMS Enterprise Portal* in the PDF version of the CMS Enterprise Portal User Guide.

Once you have successfully completed IDM registration, you may log in to ePortal and request an IC Application role.

2.4.2 Requesting an IC Application Role

To access the TEAM CET, you need to request an IC Application user role. To request this role, you must successfully complete the Remote Identity Proofing (RIDP) process and register your Multi-Factor Authentication (MFA) device.

The following are the instructions on how to request an IC Application user role:

1. Go to the ePortal (https://portal.cms.gov/portal/) and log in using your IDM user ID and password that you created above.

   NOTE: All users who sign in for the first time after creating an account will automatically be prompted to confirm their email as their default MFA device. Users will be prompted to authenticate with an MFA device that is registered to their account each time they sign into the Enterprise System.

2. On the **My Portal** page, select "**Add Application"**.
3. On the **Request Application Access** page:
   a. In **Step 1 – Select an Application**, choose "IC-Innovation Center".
   b. In **Step 2 – Select a Role**, choose "Innovation Center Privileged User".
   c. In **Step 3 - Complete Identity Verification**, click on the **Launch** button to begin the Identity Verification process.
4. Read the **Terms and Conditions** information on this page and indicate your agreement by selecting the "**I agree to the Terms and Conditions"** checkbox. Click the "**Next"** to continue.
5. Enter your information into the required fields of the **Enter Your Information** page. Select "**Next"** to continue the identity verification process.
6. Provide an answer to each question and then click "**Next"** to continue.
7. If successful, a **confirmation** message is displayed.

For additional instructions, refer to *Section 9.3 – Requesting a Role* in the PDF version of the CMS Enterprise Portal User Guide.

Once you have successfully requested an IC Application user role, log out of the ePortal and follow the steps in section 2.3.3 below to request access to the TEAM CET.

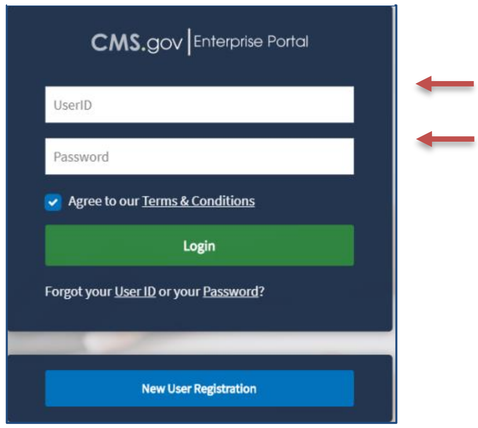
2.4.3 Requesting Access to the TEAM Custom Export Tool (CET)

NOTE: TEAM CET access requests will only be approved for TEAM participants who submitted a signed Data Sharing Agreement (DSA) and Data Request and Attestation (DRA) Form, which lists the requesting user as a Data Custodian. Users that are not assigned the Data Custodian role will not be granted access to the TEAM CET.

To request access to the TEAM CET, complete the following steps:

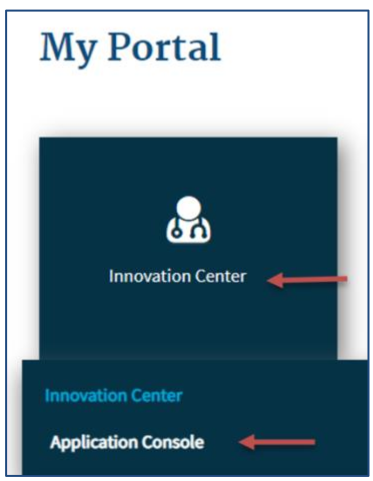
1. Go to the ePortal (https://portal.cms.gov/portal/) and log back in using your IDM user ID, password, and MFA-generated security code.

Figure 3. CMS ePortal Login



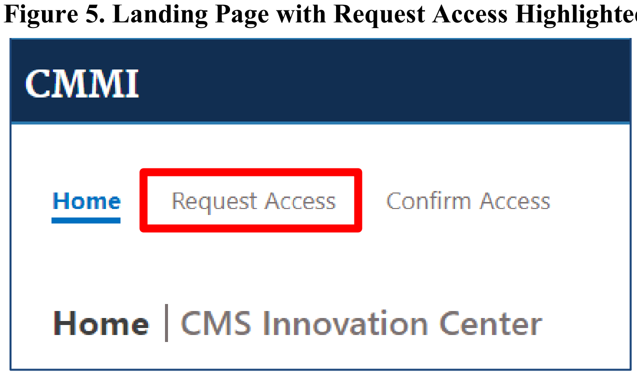
2. On the **My Portal** page, select the "**Innovation Center"** widget. Then select the "**Application Console"** link.

Figure 4. My Portal Page



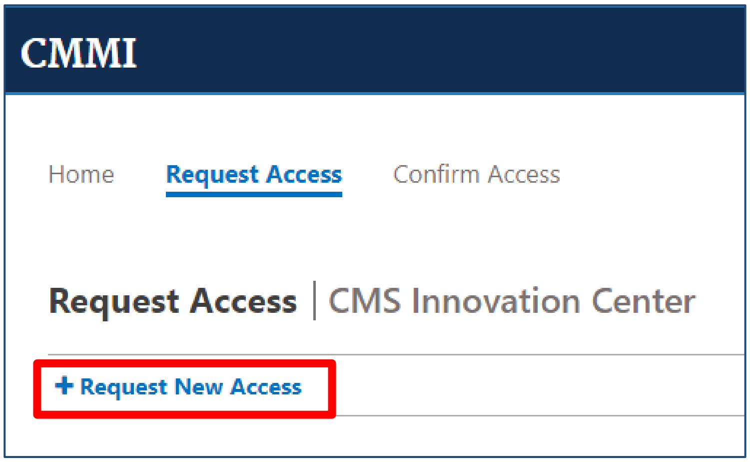
3. Select "**Request Access**." (You will be directed to a new screen to request access).

Figure 5. Landing Page with Request Access Highlighted



4. On the **Request Access** tab, select "**Request New Access**." (You will be directed to a new screen to make your selections).

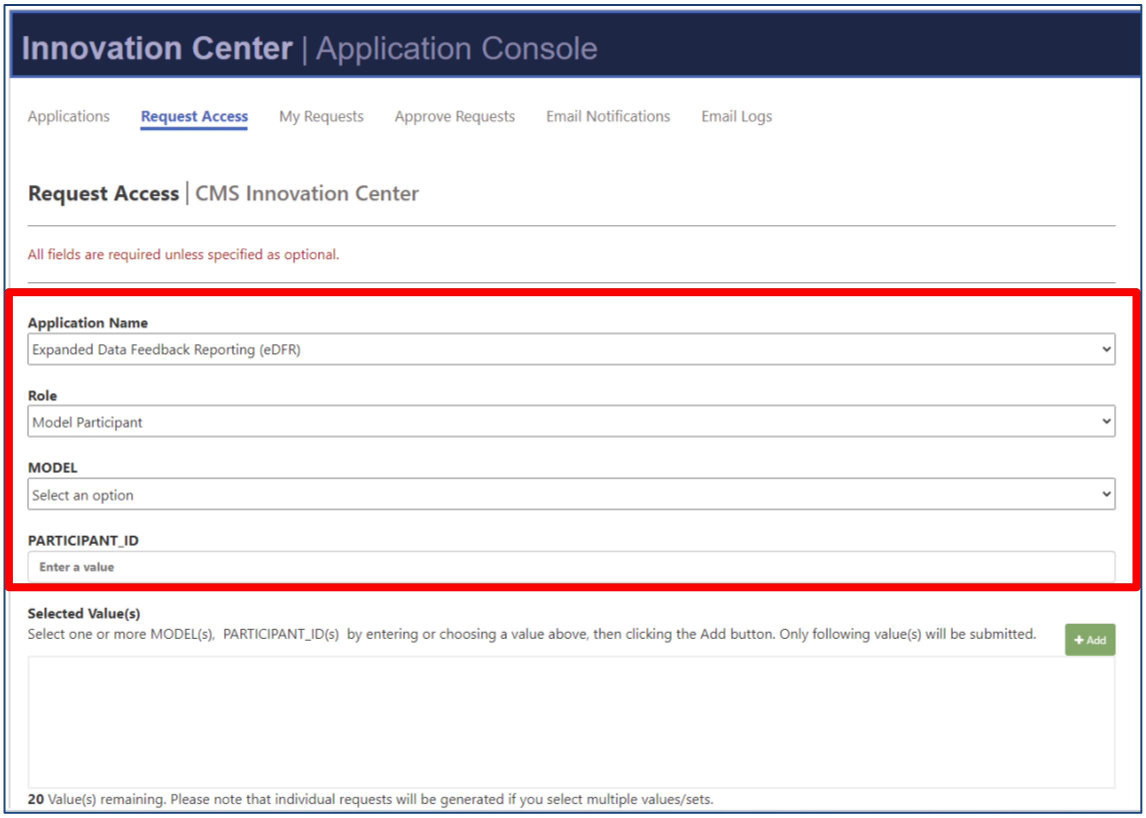
Figure 6. Landing Page with Request New Access Link Highlighted



5. Select "**Expanded Data Feedback Reporting (eDFR)"** from the **Application Name** dropdown. Then select your role – **Model Participant** – from the **Role** dropdown. Application permissions are granted based on user role.
6. When you select the "**Model Participant"** role, you are required to select a **Model** and a **Participant CCN** since this user role is granted access to models at the entity level. Each entity within a model has its own Participant CCN. In TEAM, your Participant CCN is the term 'TEAM' followed immediately by your 6-digit hospital CMS Certification Number (CCN), formatted as follows – TEAMXXXXXX (e.g., TEAM123456).

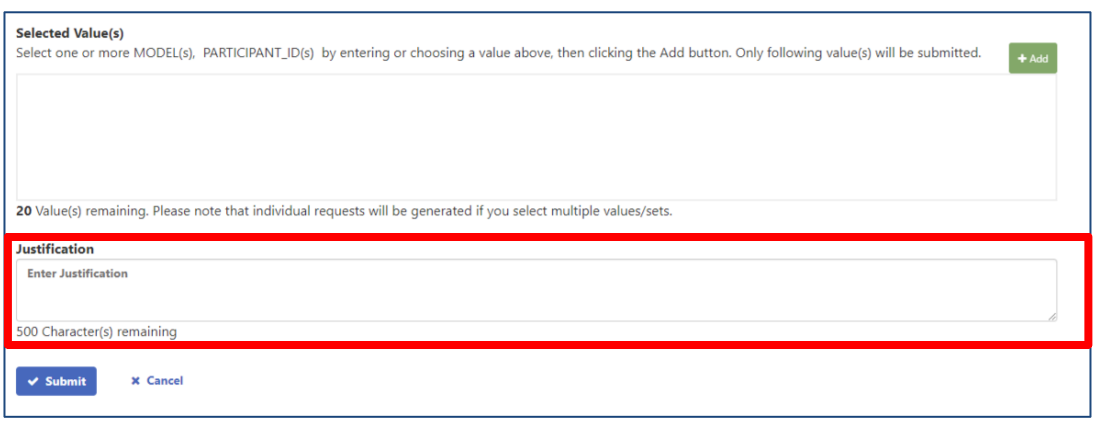
   After selecting "**Transforming Episode Accountability Model"** from the **Model** dropdown, begin typing your Participant CCN in the **Participant CCN** field to display the CCNs for selection. Then select "**Add"** to add the values to your request.

Figure 7. Sample Access Request with Application Name, Role, Model, and Participant CCN Highlighted



7. Enter the justification for your access in the **Justification** field. For example, indicate that you are an approved data user for the TEAM CET.

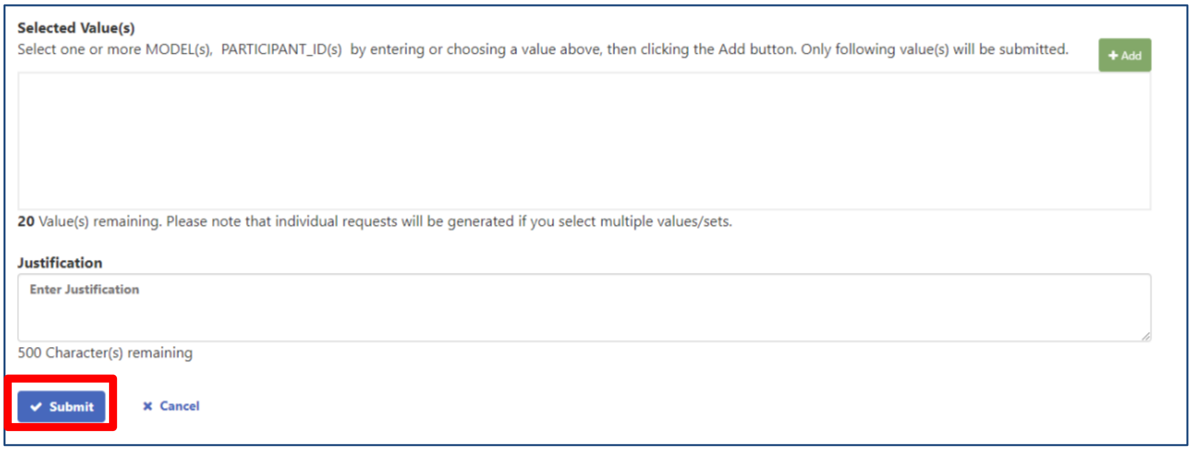
Figure 8. Sample Access Request with Justification Highlighted



Select "**Submit**" to submit your request. After you have submitted your request, you will receive an email notification stating whether your request is approved or denied.

Notification is not immediate but typically occurs within 72 hours.

Figure 9. Sample Access Request with Submit Highlighted

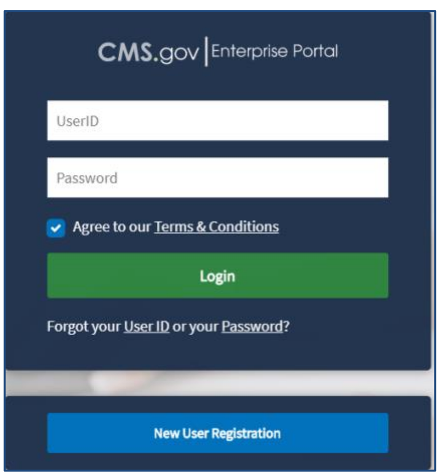


2.4.4 Accessing the TEAM Customer Export Tool with your New Login

Once you have established access to the ePortal, complete the following steps to access the TEAM CET:

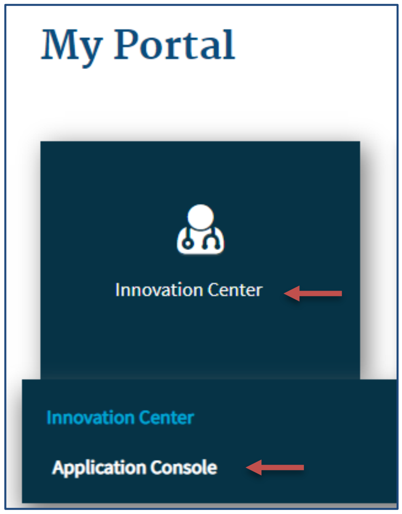
1. Go to the ePortal (https://portal.cms.gov/portal/) and log in using your IDM user ID, password, and MFA-generated security code.

Figure 10. CMS ePortal Login



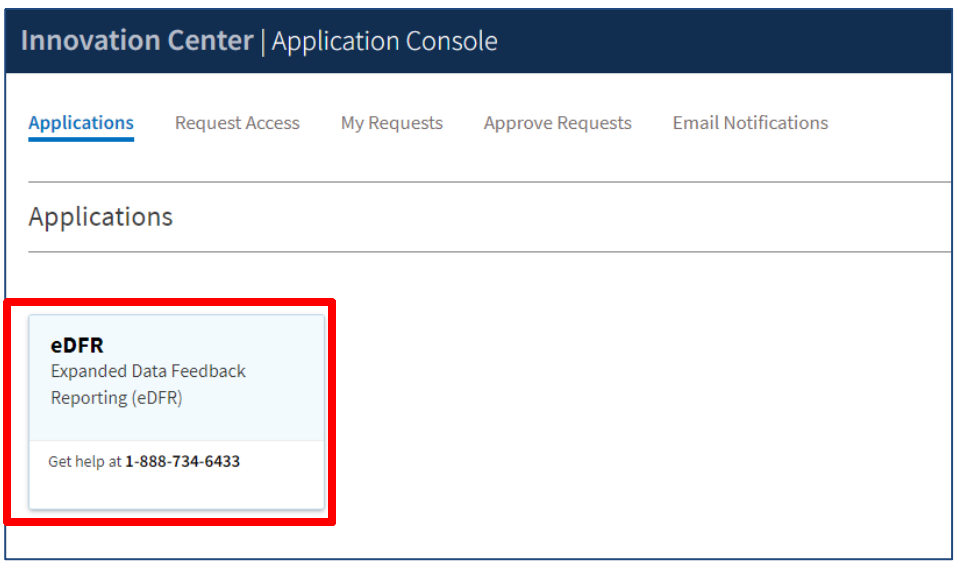
2. On the **My Portal** page, select the "**Innovation Center"** widget. Then select the "**Application Console"** link.

Figure 11. My Portal Page



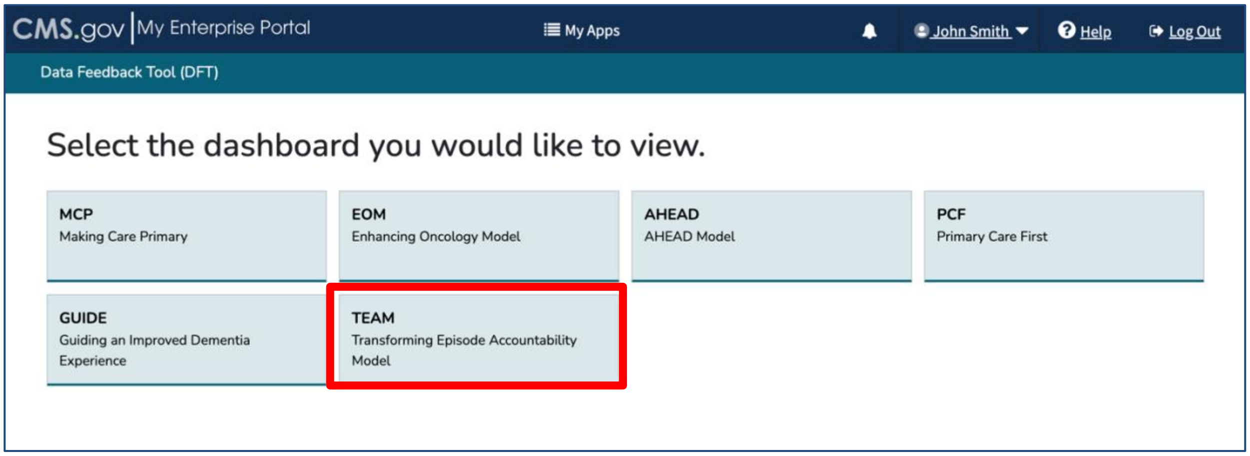
3. On the Innovation Center **Home** page, select the "**eDFR"** widget.

Figure 12. Innovation Center Home Page eDFR



4. Select the TEAM DFT by selecting the "**TEAM**" tile.

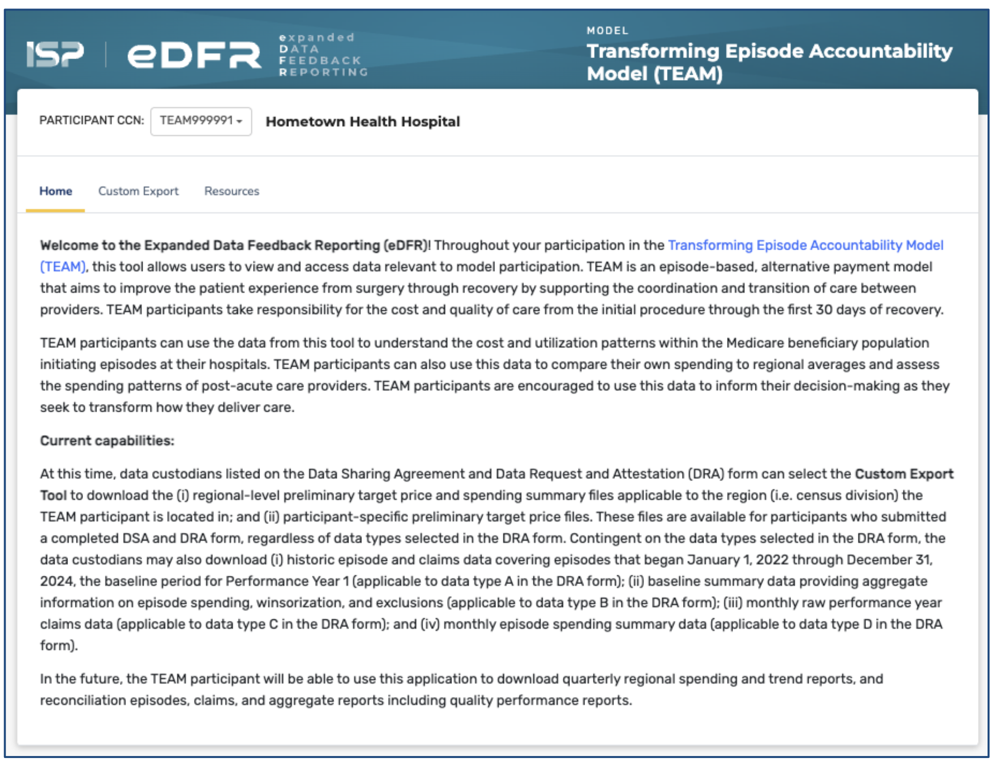
Figure 13. Model dashboard Section with TEAM Highlighted



***NOTE**: You will be able to select only the model dashboard(s) or DFT(s) that you have been approved to access.*

5. The TEAM Data Feedback Tool **Home** Page will be displayed.

Figure 14. Custom Export Tool Sample Home Page



2.5 System Organization & Navigation

This section provides detailed information on how to navigate within the TEAM CET and use common features.

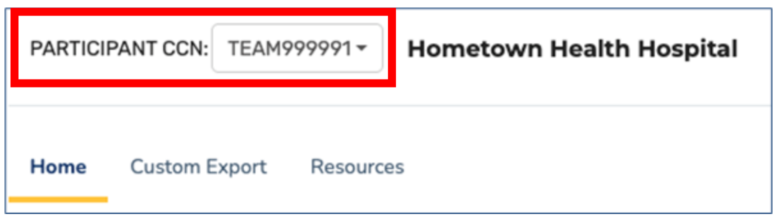
2.5.1 Header

The header information in the TEAM CET will remain the same across all sections of the tool.

The TEAM CET header displays the following information:

- **Title:** The title for the dashboard is ISP (Innovation Support Platform) eDFR (expanded Data Feedback Reporting) Transforming Episode Accountability Model (TEAM).
- The **Participant CCN** header will remain at the top of the page and display the unique number identifying the participant (in the format – TEAMXXXXXX, where "XXXXXX" is your hospital's CCN) and the full TEAM participant's name in bold.

Figure 15. Participant CCN Name and Dropdown Menu

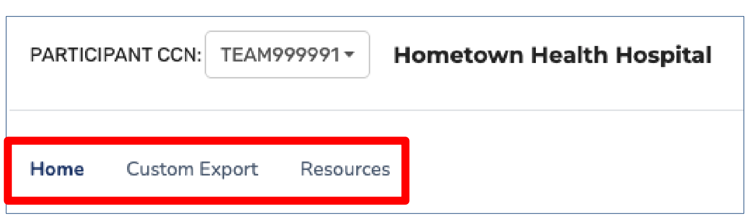


The dropdown will automatically display the first TEAM participant in the list. If you have access to more than one TEAM participant's information, you can view the Custom Export Tool for each TEAM participant by selecting the **Participant CCN** from the dropdown.

2.5.2 Navigation Bar

The navigation bar is located below the header. The navigation bar provides access to each page within the TEAM eDFR. The page you have selected will be bolded in dark blue and underlined in yellow. To navigate to other pages of the eDFR, select the desired page from this navigation bar.

Figure 16. Navigation Bar Highlighted



2.5.3 Page Overviews

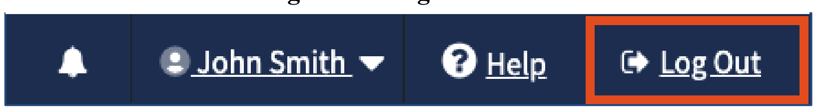
Below is an overview of the pages available within the TEAM CET:

- **Home:** The Home page serves as the landing page for the TEAM CET.
- **Custom Export:** The CET allows you to produce a set of customized downloadable data files.
- **Resources:** The Resources page displays links containing useful information for users, in addition to this TEAM User Guide.

2.6 Exiting the System

To logout of the eDFR system, click the logout button in the top right corner.

Figure 17. Logout Button



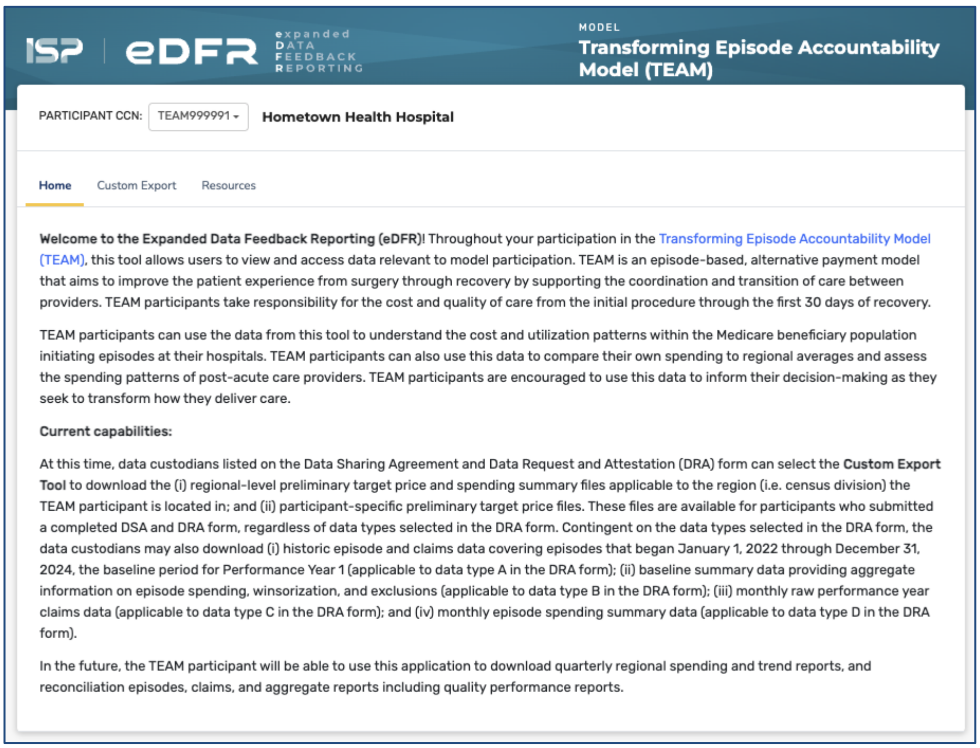
3. Using the System

This section provides detailed information on how to navigate within the TEAM eDFR and use common features.

3.1 Home Page

The Home page serves as the landing page of the TEAM CET. This page welcomes the user to the Transforming Episode Accountability Model and gives a brief overview of what the alternative payment model is designed to do.

Figure 18. TEAM Home Page



3.2 Custom Export Tool (CET)

Selecting the "Custom Export" tab in the navigation bar brings you to the Custom Export page, which contains the CET. The CET allows you to download episode and claims data and summary reports. For the initial release of the TEAM CET, the Spring 2025 Episode and Claims Data and Summary Reports were made available for download. The data refresh in December 2025, provided performance year 1 (PY1) preliminary target price reports and historic episode and claims data covering episodes that began on or after January 1, 2022 with anchor hospitalization discharge dates/anchor procedure end dates on or before December 31, 2024. This data refresh in March 2026 provides monthly raw performance year claims data and monthly episode spending summary data.

In the future, TEAM participants will be able to use this application to download quarterly regional spending and trend reports. Further, this application will also house reconciliation files including episodes, claims, and aggregate reports including reconciliation reports and quality performance reports.

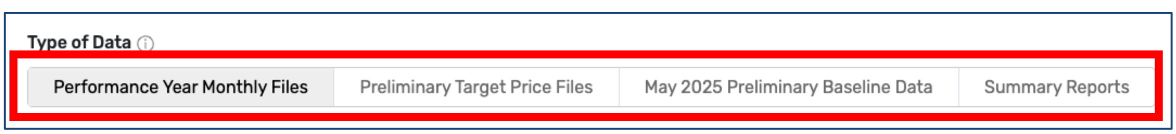
Data source: The data source for the data and summary reports in the TEAM CET is Medicare administrative data, including claims for Medicare Parts A and B, retrieved from the Centers for Medicare and Medicaid Services' (CMS') Integrated Data Repository (IDR).

Episode Construction: Episode construction is determined through the methodology described in the Clinical Episode Construction specifications (available on the resources page of the CET).

To use the Custom Export Tool:

- Select the **Type of Data** you would like to download.
    - Select "Performance Year Monthly Files" if you would like to download monthly raw performance year claims data.
    - Select "Preliminary Target Price Files" if you would like to download historic episode and claims data used for performance year 1, covering episodes that began on or after January 1, 2022 and have an anchor hospitalization discharge date or anchor procedure end date on or before December 31, 2024
    - Select "May 2025 Preliminary Baseline Data" if you would like to download historic episode and claims data not used for performance year 1, covering episodes that began on or after January 1, 2022 and have an anchor hospitalization discharge date or anchor procedure end date on or before June 30, 2024.
    - Select "Summary Reports" if you would like to download baseline summary data providing aggregate information on preliminary target prices, episode spending, winsorization, and exclusions; monthly performance year summary spending and exclusions data; and regional monthly performance year spending data

Figure 19. Custom Export Tool Type of Data Selection

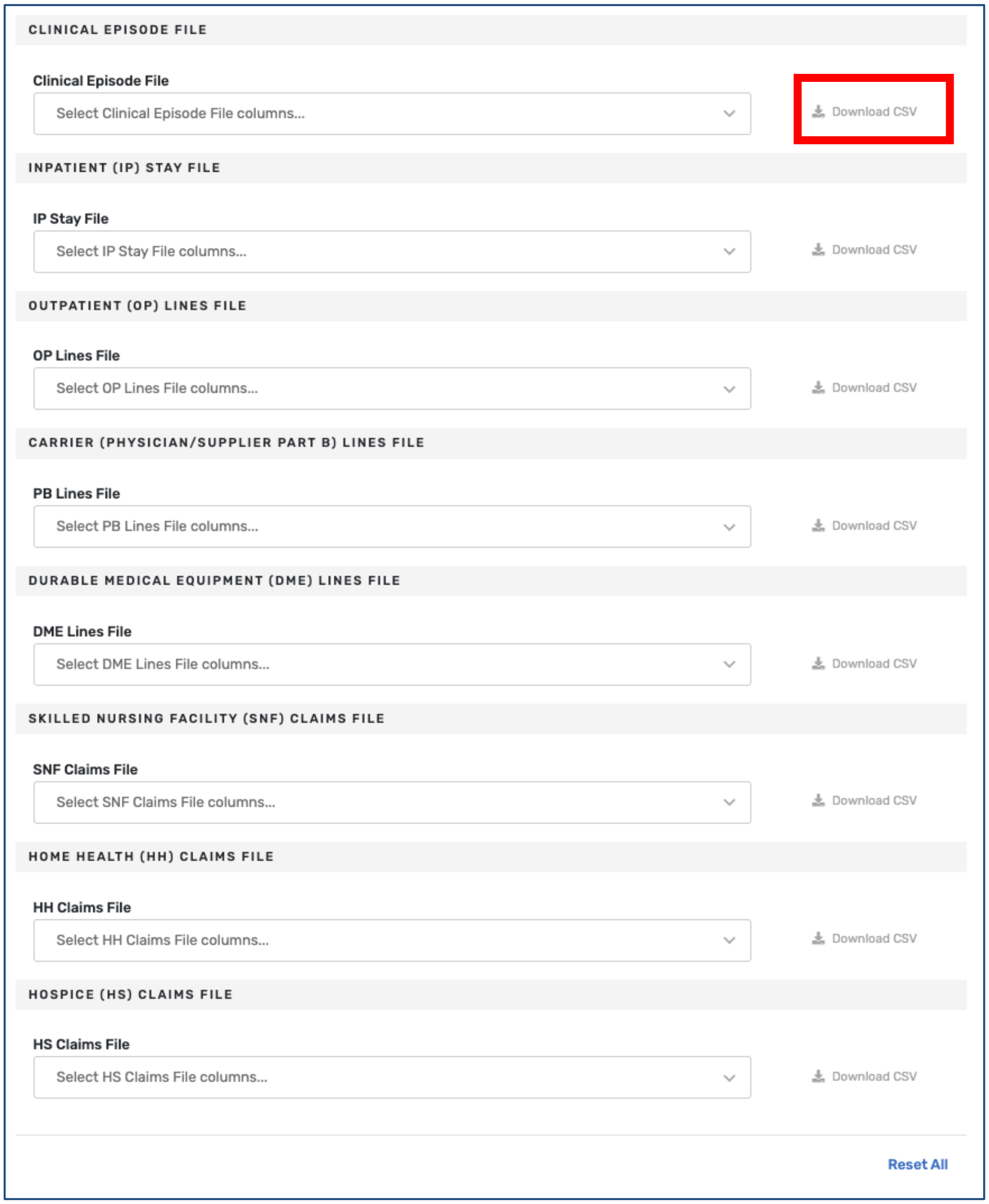


- For "Performance Year Monthly Files" or "Preliminary Target Price Files", select the desired **Reporting Period** you would like to include in your file.

Figure 20. Custom Export Tool Reporting Period Selection

- Then select the file and the columns you would like to include and select **Download CSV** next to the drop-down to download your file.

Figure 21. Download CSV



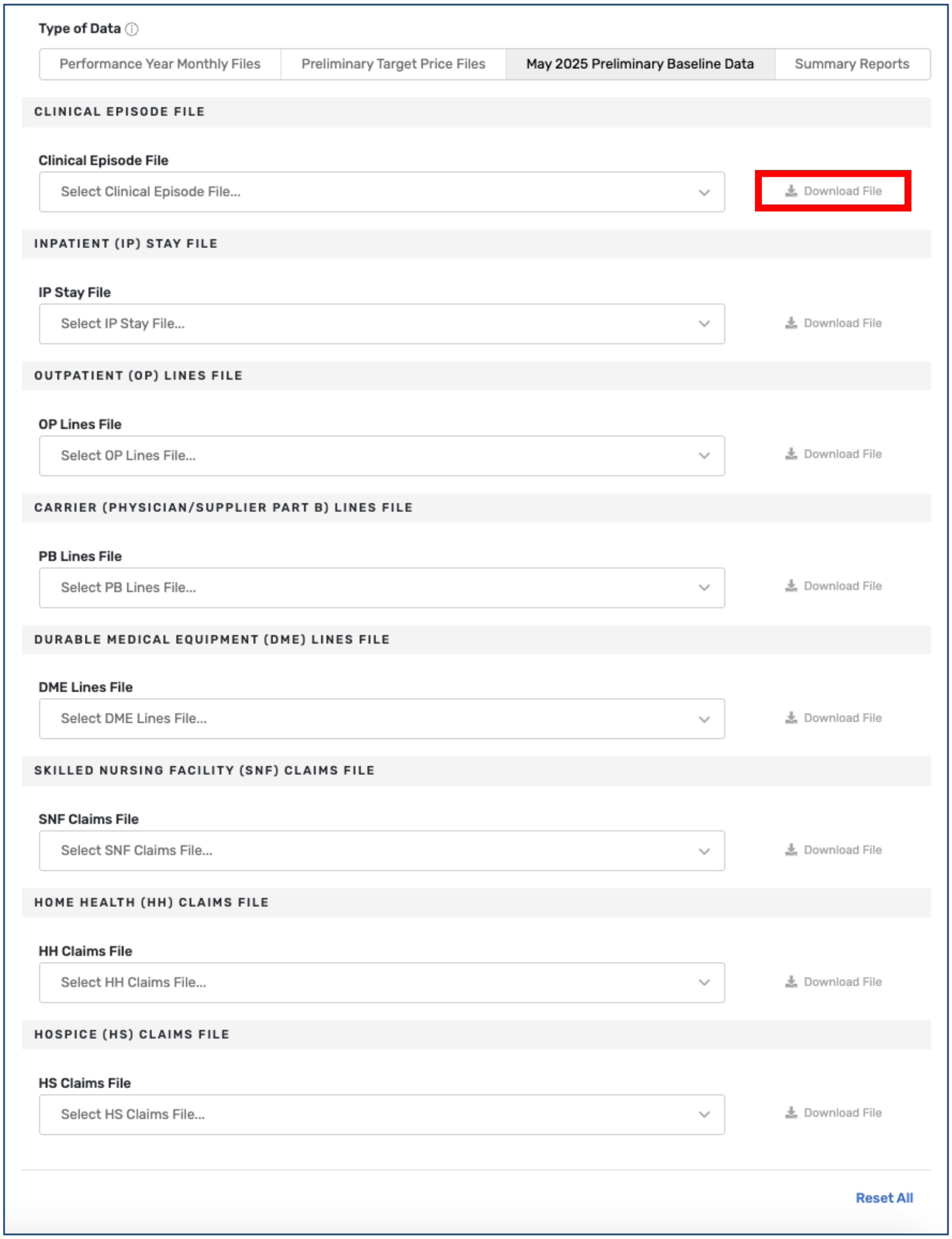
- **Note:** Both a 'Reporting Period' and at least one 'Column' must be selected for "Download CSV" to be activated. Large files may take time to download. For best performance, download one file at a time. Remember that very large files will not open properly if Excel is used to view the file.

- Your selected columns will be retained for your next session to allow you to quickly re-download any updated files. These selections will reset if you clear your cache or use a different browser.
- You can reset your selection and start over by selecting **Reset All** at the bottom left of the screen. This will also reset your selections for your next session.

Figure 22. Reset All

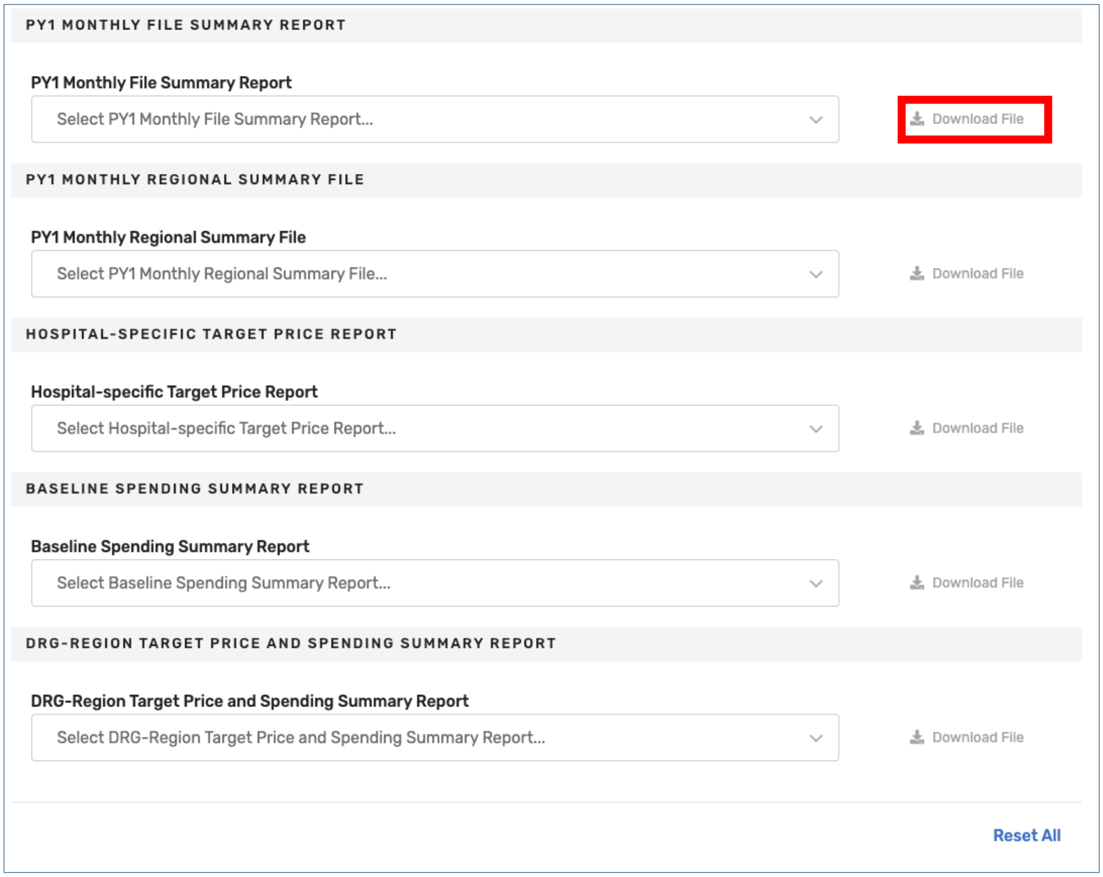
- For "May 2025 Preliminary Baseline Data", select the desired file, then select **Download File** next to the drop-down to download your file.
- **Note:** The May 2025 Preliminary Baseline Data are only available as static files as originally released. Starting with the PY1 preliminary data, you will be able to download customized episode and claims CSV files (see "Performance Year Monthly Files" section above).

Figure 23. May 2025 Preliminary Baseline Data Section



- For Summary Reports data, select the desired report, then select **Download File** next to the drop-down to download your file.

Figure 24. Summary Reports Section



For episode and claims data, there are a total of 8 possible CSV files available for download. The CSV files available for download are:

- The **Clinical Episode File** provides data for clinical episodes for the selected reporting period.
- The **Inpatient (IP) Stay File** provides data for grouped IP stays occurring during the episode window.
- The **Outpatient (OP) Lines File** provides data for grouped OP claims occurring during the episode window.
- The **Carrier (Physician/Supplier Part B) Lines File** provides data for grouped physician/supplier Part B (PB) claims occurring during the episode window.
- The **Durable Medical Equipment (DME) Lines File** provides data for grouped DME claims occurring during the episode window.
- The **Skilled Nursing Facility (SNF) Claims File** provides data for grouped SNF claims occurring during the episode window.

- The **Home Health (HH) Claims File** provides data for grouped HH claims occurring during the episode window.
- The **Hospice (HS) Claims File** provides data for grouped HS claims occurring during the episode window.

The episode and claims data available for download are based on Medicare administrative data, including claims for Medicare Parts A and B, retrieved from the Centers for Medicare and Medicaid Services' (CMS') Integrated Data Repository (IDR).

Review the data dictionaries available on the **Resources Page** (see below) for a complete list of all the data included in these files. The data dictionaries include a list of data element names, data type, length, format, and descriptions.

For **Summary Reports**, there are a total of 5 files available for download. The files available for download are:

- PY1 Monthly File Summary Report
- PY1 Monthly Regional Summary File
- Hospital-specific Target Price Report
- Baseline Spending Summary Report
- DRG-Region Target Price and Spending Summary Report

You will be able to download the Hospital-specific Target Price and Baseline Spending Summary reports and Region-level Target Price and Spending Summary reports in Excel format. The files will be available for download as they are released annually for each performance year. These reports offer a summary of hospital-specific and regional level clinical episode spending, participant-specific target prices, and target price components. You will also be able to download a monthly spending report that contains hospital-specific performance year clinic episode spending, and a monthly regional performance year spending report. Note that hospital-specific reports are only provided if available for your hospital (e.g., if there is an episode initiated at your hospital).

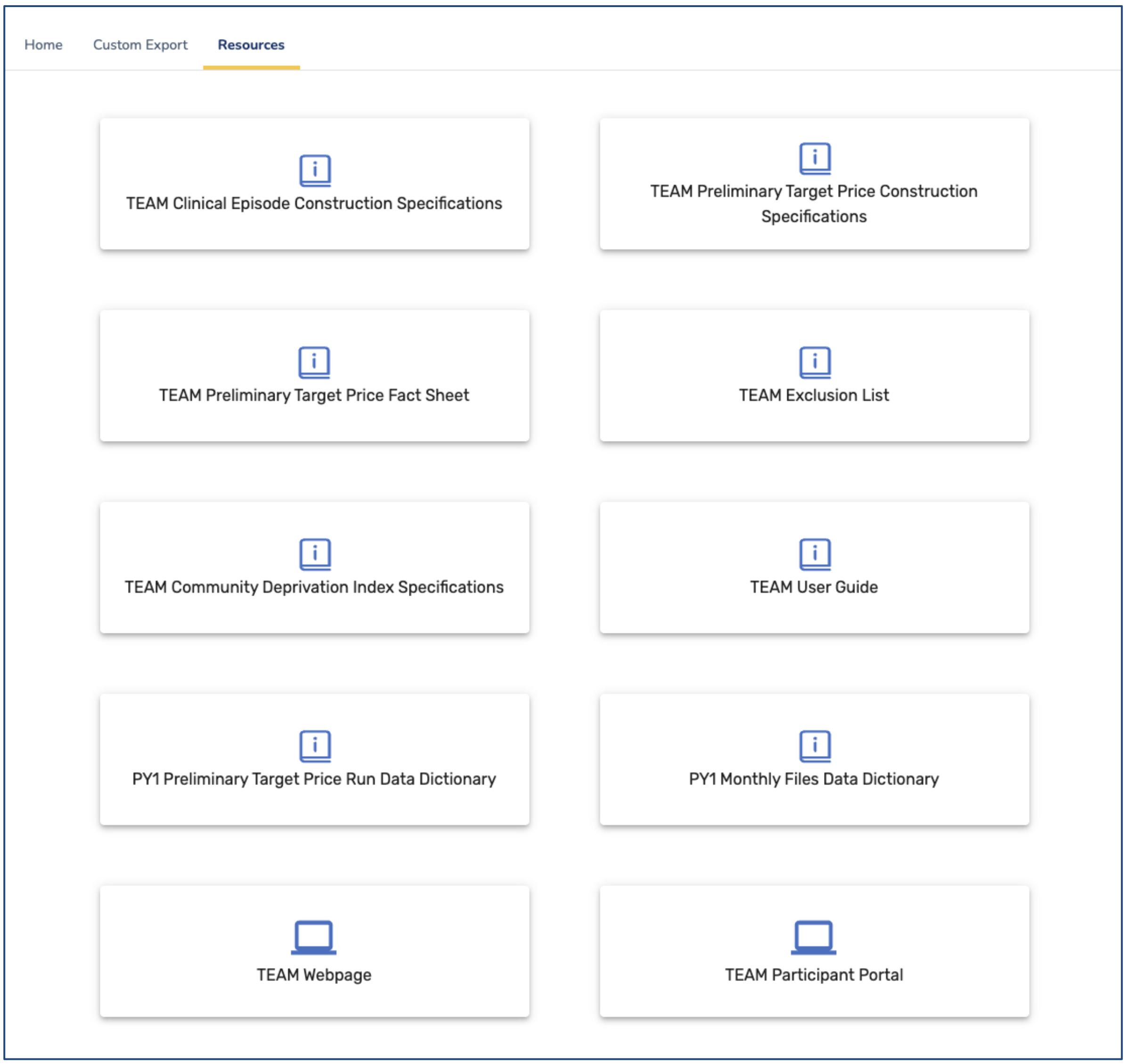
3.3 Resources Page

The resources page displays links containing useful information for users. In addition to this TEAM User Guide, the Resources page includes:

- TEAM Clinical Episode Construction Specifications
- TEAM Preliminary Target Price Construction Specifications
- TEAM Preliminary Target Price Fact Sheet
- TEAM Exclusion List
- TEAM Community Deprivation Index Specifications

- PY1 Preliminary Target Price Run Data Dictionary
- PY1 Monthly Files Data Dictionary
- TEAM Webpage links to the official CMS.gov webpage for TEAM. It provides users with a model overview, participant list, additional information and factsheets, and links to proposed and final rules.
- TEAM Participant Portal links to the CMS IDM login page for the TEAM Portal.

Figure 25. Resources Page



4. Troubleshooting & Support

4.1 Error Messages

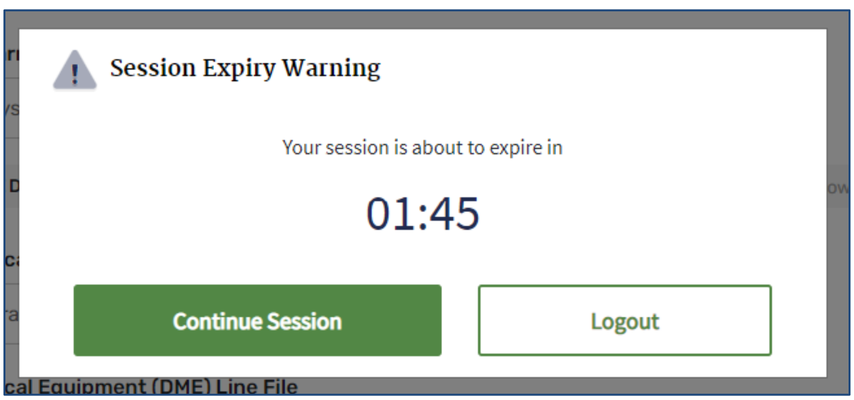
This section identifies common system error messages that may occur during login or file submission. It explains the cause of each error and provides recommended actions to help you quickly resolve the issue and continue system use.

Table 1. Common Error Messages

Error	Cause	Resolution
Login Failed	Incorrect credentials	Reset password via CMS Identity Management
Timeout Period	Inactivity - 30 minutes	Log in again

For security purposes, a two-minute Session Expiry Warning will ask you to "Continue Session" or "Logout" after a period of inactivity. Select "Continue Session" if you wish to continue, or you will be automatically logged out and directed to the CMS ePortal login page https://portal.cms.gov/portal/.

Figure 26. Session Expiry Warning Message



4.2 Support

For any issues pertaining to the TEAM CET, please contact TEAM Help Desk at CMMI_TEAM@cms.hhs.gov or at 888-734-6433.

Table 2. Support Points of Contact

Contact	Organization	Phone	Email
TEAM Help Desk	CMS	888-734-6433	CMMI_TEAM@cms.hhs.gov

Appendix A: Record of Changes

Table 3. Record of Changes

Version Number	Date	Author/Owner	Description of Change
4.0	03/17/2026	CMS	Updated template and added language regarding monthly raw performance year claims data and monthly episode spending summary data
3.0	12/18/2025	CMS	Added language regarding performance year 1 (PY1) preliminary target price reports and historic episode and claims data
2.0	12/18/2025	CMS	Updated references of “Practice ID” to “Participant CCN”
1.0	05/27/2025	CMS	Initial release of the User Guide

Appendix B: Glossary

Table 4. Glossary

Acronym	Definition
CCN	CMS Certification Number
CET	Custom Export Tool
CMMI	CMS Innovation Center
CMS	Centers for Medicare & Medicaid Services
CSV	Comma Separated Values
DFT	Data Feedback Tool
DME	Durable medical equipment
DRA	Data Request and Attestation
DSA	Data Sharing Agreement
eDFR	Expanded Data Feedback Reporting
ePortal	Enterprise Portal
HH	Home Health Agency
HIPAA	Health Insurance Portability and Accountability Act
HS	Hospice
IC	Innovation Center
ID	Identification
IDM	Identity Management System Account
IDR	Integrated Data Repository
IP	Inpatient
ISP	Innovation Support Platform
MFA	Multi-Factor Authentication
OP	Outpatient
PB	Physician/supplier Part B
PDF	Portable Document Format
PY	Performance Year
RIDP	Remote Identity Proofing
SNF	Skilled nursing facility
TEAM	Transforming Episode Accountability Model

Appendix C: Referenced Documents

Table 5. Referenced Documents

Document Name	Document Location and/or URL	Issuance Date
CMS Enterprise Portal User Guide	https://portal.cms.gov/portal/help/digital/user-guide/?guide=enterprise_portal_user_guide.	N/A

Appendix D: Approvals

The undersigned acknowledge that they have reviewed the User Manual and agree with the information presented within this document. Changes to this User Manual will be coordinated with, and approved by, the undersigned, or their designated representatives.

Table 6. Approvals

Document Approved By	Date Approved
Name: Daniel Sangria, Model Coordinator – Global Alliant, Inc.	3/2/2026
Name: Thomas Ensor, Model Team Analyst – CMS	3/3/2026