DEPARTMENT OF HEALTH & HUMAN SERVICES
Centers for Medicare & Medicaid Services
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CENTER FOR MEDICARE

TO: All Prescription Drug Plan Sponsors, Program for All-Inclusive Care for the
                Elderly (PACE) Organizations, and Medicare Advantage Organizations (MAOs)

FROM: Vanessa Duran
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SUBJECT: Contract Year (CY) 2024 Access to the Additional Beneficiary Information
                Initiatives (ABII) Web Portal

DATE: November 14, 2023

The purpose of this memorandum is to inform Part D sponsors, PACE Organizations, and
Medicare Advantage Organizations of the continuation of the Additional Beneficiary
Information Initiatives (ABII) Web Portal for CY 2024 and provide operational information for
participants in this process. In 2018, the Centers for Medicare & Medicaid Services (CMS)
announced the scheduled launch of the ABII web portal starting January 1, 2019. The ABII web
portal was developed to improve the coordination of benefits process by providing Part D plans
with additional information about their enrollees. This memorandum provides guidance about
requesting available reports and technical information about the ABII web portal, including the
process and time frame for submitting access requests.

A. Requesting and Using ABII Reports

In preparation for CY 2024, we encourage Part D plans to request access to the ABII web portal,
which will provide a secure mechanism for Part D plans to retrieve information about their
enrollees for the purpose of improving administration of the Part D benefit. Hosted by Dobson
DaVanzo and Associates, LLC and its subcontractor Acumen, LLC (Acumen), the ABII web
portal will be accessible only to authorized users, and each contract will have its own segmented
space within the module. Each Part D plan's Medicare Compliance Officer is responsible for
obtaining and maintaining access to the ABII web portal for their organization. Detailed
instructions on adding authorized users to the ABII web portal are available in Section C of this
memorandum. Authorized ABII users will be notified when a new report is available for
download.

Once plans gain access to the ABII web portal, they may request reports by submitting a data
request form. Instructions for submitting data request forms are provided in Section C. Currently,

there are two report types available on the ABII web portal: the Medicare-Covered Transplant Beneficiaries File and the Outpatient Dialysis Facility File. The Medicare-Covered Transplant Beneficiaries File provides historical non-renal transplant information to Medicare Advantage Prescription Drug Plans (MA-PDs), Prescription Drug Plans (PDPs), and National PACE Organizations for beneficiaries currently enrolled in the contract, as well as for beneficiaries who have been enrolled in a given contract at any point during the past 3 calendar years. ABII reports do not include kidney transplants, and plans will continue to rely on MARx for renal transplant information. The Outpatient Dialysis Facility File provides information to PDPs about dialysis periods for currently enrolled beneficiaries who have at least one day of dialysis service within the current contract year. This report is not available to MA-PD or PACE contracts.

The scheduled report release dates and corresponding data request form due dates for CY 2024 are as follows:

Transplant Report Data Request Form Due Date	Transplant Report Release Date
Friday, January 19, 2024	First CY 2024 Report Release: Friday, January 26, 2024
Friday, March 22, 2024	Report Release: Friday, March 29, 2024
Friday, May 24, 2024	Report Release: Friday, May 31, 2024
Friday, August 23, 2024	Report Release: Friday, August 30, 2024
Friday, November 15, 2024	Report Release: Friday, November 22, 2024

Dialysis Report Data Request Form Due Date	Dialysis Report Release Date
Friday, February 16, 2024	First CY 2024 Report Release: Friday, February 23, 2024
Friday, February 16, 2024	Final CY 2023 Report Release: Friday, February 23, 2024 (only applicable to contracts active as of 12/31/2023)
Friday, April 19, 2024	CY 2024 Report Release: Friday, April 26, 2024
Friday, June 21, 2024	CY 2024 Report Release: Friday, June 28, 2024
Friday, August 23, 2024	CY 2024 Report Release: Friday, August 30, 2024
Friday, October 18, 2024	CY 2024 Report Release: Friday, October 25, 2024
Friday, December 6, 2024	CY 2024 Report Release: Friday, December 13, 2024

Any updates to the above report release schedules will be communicated through ABII portal announcements. Please note that plans must have at least one authorized user in order to access ABII portal announcements.

Part D sponsors are expected to rely on CMS data as soon as the information is made available to them. In the rare event of a deleted record, sponsors should fully investigate whether the change in report is in fact due to an action or change that ultimately affects whether Part D or Part B coverage is available in that unique circumstance. For more detailed information about the methodology, please visit the Help Documents section of the ABII web portal, or contact Acumen at ABII@AcumenLLC.com or CMS at PartD_COB@cms.hhs.gov. CMS also invites plans to submit ideas on how the ABII web portal could provide additional information to Part D plans that would help them improve coordination of the Part D benefit. Suggestions may be sent to PartD_COB@cms.hhs.gov.

B. ABII Web Portal Actions and Timelines

The following table summarizes the actions and timelines for accessing reports on the ABII web portal for CY 2024.

Action	Date
New CY 2024 contracts: Medicare Compliance Officers can complete the user authorization process for the ABII web portal via Acumen's User Security web portal. To request reports on the ABII web portal, Medicare Compliance Officers can then submit a data request form for the report type they wish to access. Section C of this memorandum provides instructions for adding new users and submitting data request forms.	**December 1, 2023**
Contracts continuing from CY 2023: No action is necessary if your contract has no changes in authorized users or their levels of access. Previously authorized users will retain their access to the ABII web portal. If necessary, Medicare Compliance Officers can modify existing user access through Acumen's User Security web portal. Contracts do not need to take any action to receive report types for which they have already successfully submitted a data request form. If a contract has not submitted a data request form but wishes to access a certain report, that contract's Medicare Compliance Officer would submit a data request form. Section C of this memorandum provides instructions for submitting data request forms.	
All CY 2024 contracts: Be prepared to receive and review notifications from Acumen regarding updated report availability.	**Rolling basis according to the report release schedule posted on the ABII web portal under the Help Documents Page in the Report Release Schedule folder, and above in section A**

C. User Authorization Instructions for Access to the ABII Web Portal

The User Authorization section of this memorandum provides instructions for adding users by **December 1, 2023.** To gain or maintain access to the ABII web portal, have your contract's Medicare Compliance Officer complete the following steps:

1. **Identify individuals who should have access to the ABII web portal.**

    If your contract is new in 2024, your contract needs to authorize users for the ABII web portal. You may choose to authorize individuals who are currently users on other Acumen web portals; however, a user authorization is needed for each individual specifically for the ABII web portal.

    If your contract is continuing from 2023, previously authorized users will retain their access to the ABII web portal. Your contract may choose to keep the same users or your contract may modify users. Note that to comply with federal information security requirements, the Acumen web portal will ask Medicare Compliance Officers to reauthorize user access every 90 days.

    For security purposes, each contract is limited to five authorized users on the ABII web portal. Authorized users will have access to all relevant features of the ABII web portal, including downloading reports, accessing discussion boards and receiving email notifications.

2. **Log on to the User Security Web Portal**
    Access to the ABII web portal is managed by each contract's Medicare Compliance Officer through Acumen's User Security web portal (https://PartD.ProgramInfo.us/User_Security). The latest Medicare Compliance Officer on record for each contract in HPMS has been granted access to the User Security web portal if the contract is active in at least one Acumen related web portal.

    To access the User Security web portal:
    a. Navigate to the web portal at https://PartD.ProgramInfo.us/User_Security.
    b. Agree to the Warning Notice.
    c. Click Sign on with HHS AMS button if the user has a Health and Human Services (HHS) Personal Identity Verification (PIV) card and the user's email domain contains HHS.gov. Otherwise click Sign on with CMS IDM button.

    If your Medicare Compliance Officer does not have access to the User Security web portal or requires assistance logging in, please contact Acumen at ABII@AcumenLLC.com.

3. **Designate Users and Authorize Access Permissions.**

If your contract is active in CY 2024, your Medicare Compliance Officer needs to log in to the User Security Web Portal to add new users and authorize access permissions or choose to authorize existing users to access your contract's information.

To designate users and authorize access permissions, Medicare Compliance Officers need to complete the following steps through the User Security Web Portal:
   a. Add an existing and/or new user.
   b. Select the Web Portal and contract(s) for each user.
   c. Authorize access permissions for each user.

Medicare Compliance Officers may also designate themselves as one of the five authorized users on the ABII web portal.

Following the user authorization process, Acumen will send a Welcome Email with the ABII web portal user guide and web portal URL to each newly authorized ABII web portal user.

For a contract's users to receive access to reports within ABII, the Medicare Compliance Officer needs to fill out a form requesting the report be made available to users associated with the contract. The data request form is available on the web portal under the Help Documents section. Contract Medicare Compliance Officers need to submit data request forms through the Upload Files page of the web portal. Medicare Compliance Officers need to authorize themselves as one of the five authorized users for their contract in order to be able to access the ABII web portal and submit data request forms. Only forms with a Form Status of "Complete" will be accepted, and forms need to follow the naming convention below to be processed:

*ContractID*_ABII_Data_Request_Form.xlsx

Only one type of report can be requested on each data request form. If a Medicare Compliance Officer wishes to request more than one report type, they need to complete and submit additional data request forms. If a contract has successfully submitted a data request form to access ABII reports for a prior year, they do not need to resubmit the request form.

For timely access to the ABII web portal, requestors need to complete all steps of the user authorization process by **December 1, 2023**.

If you have any questions or require assistance with the user authorization process, please contact Acumen at ABII@AcumenLLC.com.