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

**FROM:** Amy Larrick Chavez-Valdez  
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**SUBJECT:** Contract Year (CY) 2023 Access to the Additional Beneficiary Information Initiatives (ABII) Web Portal

**DATE:** November 17, 2022

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 2023 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 2023, 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 2023 are as follows:

<b>Transplant Report Data Request Form Due Date</b>	<b>Transplant Report Release Date</b>
Friday, January 20, 2023	First CY 2023 Report Release: Friday, January 27, 2023
Friday, March 24, 2023	Report Release: Friday, March 31, 2023
Friday, May 19, 2023	Report Release: Friday, May 26, 2023
Friday, August 18, 2023	Report Release: Friday, August 25, 2023
Friday, November 10, 2023	Report Release: Friday, November 17, 2023

<b>Dialysis Report Data Request Form Due Date</b>	<b>Dialysis Report Release Date</b>
Friday, February 17, 2023	First CY 2023 Report Release: Friday, February 24, 2023
Friday, February 17, 2023	Final CY 2022 Report Release: Friday, February 24, 2023 (only applicable to contracts active as of 12/31/2022)
Friday, April 21, 2023	CY 2023 Report Release: Friday, April 28, 2023
Friday, June 16, 2023	CY 2023 Report Release: Friday, June 23, 2023
Friday, August 18, 2023	CY 2023 Report Release: Friday, August 25, 2023
Friday, October 20, 2023	CY 2023 Report Release: Friday, October 27, 2023
Friday, December 8, 2023	CY 2023 Report Release: Friday, December 15, 2023

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](mailto:ABII@AcumenLLC.com) or CMS at [PartD\\_COB@cms.hhs.gov](mailto: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](mailto: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 2023.

<b>Action</b>	<b>Date</b>
<b>New CY 2023 contracts:</b> 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.	<b>December 2, 2022</b>
<b>Contracts continuing from CY 2022:</b> 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.	
<b>All CY 2023 contracts:</b> Be prepared to receive and review notifications from Acumen regarding updated report availability.	<b>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</b>

### ***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 2, 2022**. 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 2023*, 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 2022*, 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](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](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](mailto:ABII@AcumenLLC.com).

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

If your contract is active in CY 2023, 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 2, 2022**.

If you have any questions or require assistance with the user authorization process, please contact Acumen at [ABII@AcumenLLC.com](mailto:ABII@AcumenLLC.com).