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**DATE:** October 28, 2022

**TO:** All Current and Prospective Medicare Advantage Organizations, Prescription Drug Plan Sponsors, Section 1876 Cost Plans, PACE Organizations, Medicare-Medicaid Plans, and Bid Consultants

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**SUBJECT:** Updates and Timeline for the Contract Year (CY) 2024 Plan Benefit Package

As discussed in the March 10, 2022 memo entitled “Health Plan Management System (HPMS) Plan Benefit Package (PBP) Technical Redesign,” CMS will launch the CY 2024 PBP as a new web-based module within HPMS on Friday, April 7, 2023.

This memo describes the most significant changes in the redesigned PBP and provides a timeline of upcoming events and frequently asked questions (FAQs). CMS will deliver additional guidance over the coming months to ensure a smooth transition to the new module. This guidance will include information on plan technical training, the release of a draft version of the new PBP Submission User Guide, and details on Alpha and Beta testing.

As a reminder, CMS has developed a narrated recording that demonstrates the new PBP workflow using an HMOPOS plan type. The recording (as originally released in the March 10, 2022 HPMS memo) has been posted at the following URL:

[https://cms.zoomgov.com/rec/play/zq2-MpHqYl-klxpYpOoCNd9xB4uKid6iTE8GxPuB1r9hMsU\\_RN9ciMwIFTVib5uNc6Q1JUBbC4Yh8rtU.zPfdJceT3Ptv3aFf?startTime=1646783280000](https://cms.zoomgov.com/rec/play/zq2-MpHqYl-klxpYpOoCNd9xB4uKid6iTE8GxPuB1r9hMsU_RN9ciMwIFTVib5uNc6Q1JUBbC4Yh8rtU.zPfdJceT3Ptv3aFf?startTime=1646783280000)

The most notable changes include the following:

- Plans and authorized consultants will have the option to submit their PBP data using an application programming interface (API).
- CMS has instituted a “top down approach” to the PBP data entry process. Users will begin by defining plan-level features (e.g., plan deductible and maximum out-of-pocket costs), and validations will flow to the benefit-level data entry. Please refer to **Appendix A** for a mapping of the current CY 2023 schema variables to the redesigned PBP (this does not yet include new CY 2024 variables). The mapping is presented in three tabs: MA, Rx, and Benefit Details.

- Dynamic picklists will be populated with only those benefits offered by the plan rather than the entire list of possible benefits.
- Benefit data entry pages that are not applicable to a given plan will not be displayed.
- The new PBP software will apply edit rules and validation in real-time with on-screen error messages displaying instantaneously.
- New PBP dashboard screens will assist with the management of groups of benefits (e.g., Out-of-Network groupings, Point-of-Service groups, and Reduction in Cost Share groups).
- The software will expand the number of Out-of-Network groups to 25.
- The new PBP software will offer streamlined optional supplemental benefit data entry, which will be presented in a separate section.
- Clear status indicators will show the progress of each PBP section (i.e., not started, in progress, or completed).
- The user interface will take advantage of the modernized features of the new HPMS look and feel.
- The PBP “super user” concept has been removed. Multiple plan users may access and complete data entry for each PBP. The user’s name and the last time on which the user accessed the PBP will be displayed.
- CMS will provide a comprehensive new user’s guide to reflect the new PBP functionality.

<b>Timeline of Events</b>
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CMS will release separate communications for the events on the timeline below.

<b>Date</b>	<b>Event</b>
December 10 - 23, 2022	Plans may access the <b>CY 2023</b> PBP module in HPMS to gain familiarity with the new software.
January 3, 2023	CMS will host industry training #1 via a Zoom webinar. This session will be recorded.
January 4 - 20, 2023	CMS will offer CY 2024 PBP alpha testing for all users. Note: This effort will include API testing.
February 9, 2023	CMS will host industry training #2 via a Zoom webinar. This session will be recorded.
February 13 - 24, 2023	CMS will offer CY 2024 PBP beta testing for all users.

Date	Event
April 7, 2023	The CY 2024 PBP module and API goes live in HPMS.

<b>Getting Access to the Plan Benefit Package Module</b>
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In order to access the new PBP module, each user must have the following:

1. An active CMS user ID with the HPMS production job code assigned (HPMS\_Prod\_AWS);
2. One or more contract numbers assigned to the user ID in HPMS; and the
3. Following HPMS access types assigned to the user ID:
  - a. PBP Data Entry (auto-assigned to plan users)
  - b. PBP View-Only (auto-assigned to plan users)
  - c. PBP Reports (auto-assigned to plan users)
4. To final submit the completed PBP and BPT, a user must have the **PBP/BPT Final Submit** access type assigned to their user ID.

PBP/BPT Final Submit is a restricted access type that must be requested via the [HPMSConsultantAccess@cms.hhs.gov](mailto:HPMSConsultantAccess@cms.hhs.gov) mailbox.

Users may begin requesting this access type in February 2023 in preparation of the bid submission process. To request PBP/BPT Final Submit access, each user must perform the following steps:

- a. Prepare an official letter that states the user’s name, CMS user ID, contract number(s), and that PBP/BPT Final Submit access is required.
- b. The letter must be provided on the organization’s official letterhead and signed by a senior official of the organization. Organizations can request this access for more than one user in a single letter. Both plan users and consultants may have this access.
- c. CMS recommends the use of the following sample language:

(Name of Organization) hereby requests that (Name of Individual and CMS user ID) be granted PBP/BPT Final Submit access for the following contract number(s): (list specific contract numbers).

- d. Submit the official letter via e-mail in scanned PDF format to [HPMSConsultantAccess@cms.hhs.gov](mailto:HPMSConsultantAccess@cms.hhs.gov). To facilitate timely processing, please indicate **PBP/BPT Final Submit Access** in the subject line of the e-mail.

Consultants may also perform this work on behalf of MA and Part D organizations in HPMS. Please refer to the February 18, 2022 memo entitled “Instructions for Requesting Consultant Access to the Health Plan Management System (HPMS)” for detailed guidance on requesting consultant access to HPMS. The PBP-related access types are associated with the Bid Consultant profile.

Please note that there is **no limit** on the number of users permitted access to HPMS per organization.

General HPMS user access guidance is available at the following website:  
<https://www.cms.gov/Research-Statistics-Data-and-Systems/Computer-Data-and-Systems/HPMS/UserIDProcess>

### **API Testing Preparation**

Beginning with CY 2024, CMS will provide plans and their contracted third party vendors and consultants with an additional mechanism for submitting their PBP data to HPMS. Plans will have the option to submit these data via the new PBP module; alternatively, plans may submit via a new application programming interface (API).

An application programming interface, or API, provides an interface that allows two pieces of software or systems to communicate with each other. HPMS follows the Partner API release policy, where the API is shared only with users that have access to HPMS.

In the case of the PBP process, the API can be used to set up protocols to submit the PBP data to HPMS, without an individual physically logging into the HPMS website. To accomplish this, a plan or contracted industry partner would be responsible for developing an API to: (1) send the PBP data to the PBP API, and (2) call the PBP API to determine the status of the submitted PBP data. **Appendix B** includes a sample YAML file that can be: (a) used to generate clients, (b) imported into third party applications, such as Postman or editor.swagger.io, and/or (c) read via a standard text editor.

CMS will release more information on the new PBP API option in a separate communication.

### **Frequently Asked Questions (FAQs)**

#### **1. Will the plan copy feature be available for the PBP for CY 2024?**

Yes, the plan copy feature will be available for the CY 2024 PBP. Plans will be able to copy from year to year (e.g., CY 2023 to CY 2024) and within a contract year (i.e., copy all or part of a CY 2024 plan to another CY 2024 plan).

#### **2. What will the new database structure look like?**

The new CY 2024 PBP data structure will be mapped back to the existing PBP data structure to provide plans and other users of the PBP data to transition (see Appendix A). That said, plans can expect to see some adjustments in the CY 2024 PBP data structure to accommodate routine policy and operational changes. CMS has not yet determined when support for the existing data structure will be retired beyond 2024.

**3. Will the HPMS PBP data extracts change?**

Given that the new CY 2024 PBP data structure is being mapped to the existing structure, the data extracts will remain the same as they are today, except where changes are required due to routine policy and operational changes.

**4. Will I have to download/upload the PBP?**

No, users will no longer download PBP software or upload the PBP data to HPMS. Plans will have the option to enter benefits data using the HPMS PBP module or submit the PBP data via an API. The Bid Pricing Tool (BPT) remains a separate Excel application and will still be available for download in HPMS.

**5. What PBP reports will be available?**

While the PBP data and history reports will remain available, the following reports will be retired for CY 2024:

- Viewing import history;
- Viewing export history;
- Viewing the plan update history;
- Viewing the plan upload history; and
- Clearing history for selected plans.

**6. Can more than one user access a given plan's PBP at the same time?**

Yes, more than one user may access a PBP at the same time. The new PBP module fully supports a multi-user environment.

**7. Will there be a similar feature like "Plan Maintenance" in the new PBP module?**

No, the plan maintenance functionality is not needed for the new PBP module. Access to the module will be governed by the overall HPMS user access process.

**8. Will the new web version have the ability to compare benefit filing year over year to support the Annual Notice of Change (ANOC)?**

Users can access the existing "plan comparison report across years" in the HPMS Bid Reports area for this purpose.

**9. How will BPTs be submitted in CY 2024?**

Users will upload the BPT files via a new BPT Upload page in the HPMS Bid Submission module. CMS will provide details on the revised bid submission workflow in a separate communication.

**10. For CY 2024, will CMS maintain the Access database version of the PBP software in addition to the redesigned PBP module?**

No, the Access-based PBP software will be retired starting in CY 2024.

**11. Will the XML PBP export be available?**

The XML PBP export option will not be available starting in CY 2024. Instead, users will be able to export the PBP report using JavaScript Object Notation (JSON). The JSON file will contain the same data as was provided in XML, but the new format is in line with current industry practices.

**12. Can we maintain our old PBP databases (e.g., CY 2023 and earlier)?**

Yes, users may keep prior year PBP databases for internal purposes.

**13. Will the new PBP impact the CMS Desk Review process?**

CMS will have the ability to open the resubmission gates for an entire plan bid or only specific parts of the bid. Where less than an entire plan bid is impacted, CMS will be able to request a resubmission for the BPT, the MA sections of the PBP, and/or the Rx sections of the PBP.

For any additional questions regarding this memo, please contact the HPMS Help Desk at either [hpms@cms.hhs.gov](mailto:hpms@cms.hhs.gov) or 1-800-220-2028.