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**DATE:** November 28, 2022

**TO:** Medicare Advantage Organizations, Cost Plans, and Demonstrations

**FROM:** Amy Larrick Chavez-Valdez, Director, Medicare Drug Benefit and C & D Data Group

**SUBJECT:** Healthcare Effectiveness Data and Information Set (HEDIS®) Measurement Year 2022 Patient-Level Detail Data File Submission Information

This memorandum describes the process for submitting the HEDIS Measurement Year (MY) 2022 Patient-Level Detail (PLD) files.

**All HEDIS MY 2022 PLD data must be audited and validated prior to submission to CMS by 11:59 p.m., Eastern Time, on June 15, 2023. There are no late submissions.** Your HEDIS MY 2022 PLD files must match your HEDIS MY 2022 summary-level files submitted to the National Committee for Quality Assurance (NCQA).

Resources

The HEDIS MY 2022 PLD data instructional documents are available at <http://go.cms.gov/plandata> under the “Downloads” section, near the bottom of the page. They are labeled HEDIS Patient Level Data Submissions Instructions - 2023. These documents include file specifications for File 1 and File 2, submission instructions, and a crosswalk identifying the changes from MY 2021 to MY 2022.

1. HEDIS MY 2022 PLD File Specifications, File 1
2. HEDIS MY 2022 PLD File Specifications, File 2
3. HEDIS MY 2022 PLD File 1
4. HEDIS MY 2022 PLD File 2
5. HEDIS MY 2022 PLD File Submission Instructions
6. HEDIS MY 2021 to MY 2022 PLD File Specifications Crosswalk

Be sure to inform your NCQA-certified HEDIS Compliance Auditor and any third-party vendor submitting the data on your behalf about the instructions on <http://go.cms.gov/plandata>.

File Submission

All plans submitting HEDIS PLD files should use either an existing Gentran, Managed File Transfer (MFT), or Connect:Direct type of account which is currently used to submit other

beneficiary-specific information to CMS. Submitters will use their existing Enterprise File Transfer (EFT) method and use the file naming conventions in the HEDIS MY 2022 PLD file submission instructions.

### Submission Period

The submission period for the HEDIS MY 2022 PLD data files is from 8:00 a.m., Eastern Time, on May 22, 2023 through 11:59 p.m., Eastern Time, on June 15, 2023. If one or both files do not pass validation, you should immediately inform your submitter so that the corrected files are successfully resubmitted by the deadline.

Scope Infotech, Inc., the CMS contractor for HEDIS PLD, will complete the validation of the data files. CMS requires that your company designate a “Point of Contact” (POC). Your POC will register in the CMS Identity Management (IDM) system and use the IDM credentials to log in to the HEDIS PLD Web-Portal at <https://hedispld.cms.gov> to view the status of your HEDIS MY 2022 PLD data files during the submission period. Attached to this memorandum are the HEDIS PLD Web-Portal Instructions describing this process.

The primary POC should add a back-up POC by contacting Scope Infotech at [HEDISPLD\\_Helpdesk@cms.hhs.gov](mailto:HEDISPLD_Helpdesk@cms.hhs.gov). Only the primary POC may request to add a back-up POC to the HEDIS PLD Web-Portal. The back-up POC will follow the same IDM registration process outlined in the attached HEDIS PLD Web-Portal Instructions document to obtain access to the HEDIS PLD Web-Portal.

### Dry Run

The purpose of the HEDIS MY 2022 PLD data dry run is to verify the EFT connectivity and to identify any programming or logic errors prior to the official HEDIS MY 2022 PLD file submissions to CMS. CMS highly recommends that all contracts required to submit HEDIS PLD data participate in the HEDIS PLD dry run in April 2023 to ensure that connectivity is in place and that files are formatted correctly.

Dry run participants should submit their HEDIS PLD data files through the EFT from 9:00 a.m., Eastern Time, on April 3, 2023 through 5:00 p.m., Eastern Time, on April 21, 2023.

The URL for the dry run will be the same URL as that of the official file submission: <https://hedispld.cms.gov/>.

For questions about the HEDIS PLD file specifications, the dry run, data submission instructions, and other related matters, please email [HEDISPLD\\_Helpdesk@cms.hhs.gov](mailto:HEDISPLD_Helpdesk@cms.hhs.gov).

For questions about this memorandum, please email [HEDISquestions@cms.hhs.gov](mailto:HEDISquestions@cms.hhs.gov).

## **Attachment – HEDIS PLD Web-Portal Instructions**

### **1. Accessing the HEDIS PLD Web-Portal**

The HEDIS PLD Web-Portal has been integrated with the CMS Identity Management (IDM) system. Users will have to use their IDM credentials to log in to the HEDIS PLD Web-Portal.

#### **1.1 New User Registration**

The following are the step-by-step instructions to create an account in IDM and access the HEDIS PLD Web-Portal.

1. Navigate to <https://hedispld.cms.gov>. Please note the HEDIS PLD Web-Portal is operational from March 1, 2023 through June 30, 2023 for the HEDIS MY 2022 PLD submission. You cannot complete this step until March 2023.
2. Click the Register button on the top of the login page.
3. Complete the registration form on the IDM Registration page by providing all the required information. The email address that is used to register in IDM should be the same email address from the NCQA provided MA Submission List.
4. Click the Agree to our Terms and Conditions check box and click the Next button.
5. Enter a User ID and password that satisfies the requirements displayed in the tool tip.
6. Select a challenge question from the drop-down option, enter a response, and click the Submit button.
7. You will receive a pop-up banner that will confirm that your account was successfully created. Click the Ok button and you will be navigated to the HEDIS PLD login page.

#### **1.2 Setup the Multi-Factor Authentication (MFA)**

Multi-Factor Authentication (MFA) is now required for all users. After registered in IDM, please enter your IDM username and password on the HEDIS PLD login page. You will be navigated to set up a Multi-Factor Authentication (MFA) to add an additional layer of security when signing into your account.

There are multiple ways to set up Multifactor Authentication:

- Okta Verify (Use a push notification sent to the mobile app.)
- Google Authenticator (Enter a single-use code from the mobile app.)
- SMS Authentication (Enter a single-use code sent to your mobile phone.)
- Voice Call Authentication (Use a phone to authenticate by following voice instructions.)
- Email Authentication (Enter a verification code sent to your email.)

Once you set up a Multi-Factor Authentication, you will be asked to enter a verification code using the Multi-Factor Authentication method that you established.

1. Click the Verify Button once the code has been entered.
2. You will be navigated to the HEDIS PLD Web-portal landing page after successful authentication.

### 1.3 Changing Multi-Factor Authentication

1. To change your MFA, enter the following CMS IDM URL in your browser: <https://idm.cms.gov/>. You will be navigated to the CMS IDM page.
2. Enter your Username and Password in the CMS IDM Login block.
3. Select the Agree to our Terms & Conditions checkbox and select the Sign in Button, then you will be navigated to a page where you can request your MFA Code.
4. Select the Send me the code button and the code will be sent to the email address that is listed in your CMS IDM profile. Enter the verification code and you will be navigated to your CMS IDM profile.
5. Click Update Profile and you will be navigated to your account information, then select Set up next to the MFA method you want to set up.

### 1.4 Existing IDM Users

If you have an existing IDM account, you do not have to create a new user account to access the HEDIS PLD Web-Portal. Please send an email to the HEDIS PLD Help Desk at [HEDISPLD\\_Helpdesk@cms.hhs.gov](mailto:HEDISPLD_Helpdesk@cms.hhs.gov) requesting to add HEDIS PLD Web-Portal access to your existing IDM account and include your IDM account information:

- First name
- Last name
- IDM User ID
- Email address registered in IDM

**Please Note:** It may take 24-48 hours to provide you the requested access.

### 1.5 Password Reset

Please follow these steps to reset your IDM account password.

1. Click the Need help signing in? hyperlink displayed below the Sign In button on the HEDIS PLD login page.
2. Click the Forgot Password? hyperlink.
3. Enter your registered IDM email address or your IDM User ID in the Username text field and click the Reset via Email button.
4. You will see a notification banner that will confirm an email with instructions to reset your password has been sent to the email address in your registered IDM account.
5. Click the Reset Password button in the email. The Reset Password link will only be active for 4 hours. You can change your password only once every 24 hours.
6. On the IDM password reset page, provide your response to the challenge question selected during your IDM account registration, and click the Reset Password button.
7. Enter a new password that meets all the password requirements provided by IDM and click the Reset Password button.
8. You will receive a password reset success banner in IDM. Please navigate to the HEDIS PLD Web-Portal login page, then use your IDM User ID in the Username text field and new password to sign in.

## 1.6 Change Password

The IDM application requires all users to reset their password once every 60 days. If your account has been deactivated, please contact the HEDIS PLD Help Desk at [HEDISPLD\\_Helpdesk@cms.hhs.gov](mailto:HEDISPLD_Helpdesk@cms.hhs.gov) to activate your account.

1. Navigate to <https://hedispld.cms.gov>.
2. Enter your IDM User ID in the Username text field and password, click the Agree to Terms and Conditions checkbox and select the Sign In button.
3. You will automatically be navigated to the change password page if your current password has expired.
4. Enter your old password, create a new password, and click the Change Password button.
5. You will automatically be logged in to the application.

## 1.7 Unlock Account

You will receive an email notification from IDM stating that your account has been locked after three unsuccessful login attempts. Please follow these steps to unlock your account.

1. Click the Need help signing in? hyperlink below the Sign In button on the HEDIS PLD login page.
2. Click the Unlock account? hyperlink.
3. Enter your registered IDM email address or your IDM User ID in the Username text field and click the Send Email button.
4. You will see a notification banner that will confirm an email with instructions to unlock your account has been sent to the email address in your registered IDM account.
5. Click the Unlock account button in the email to unlock your account.
6. On the IDM account unlock page, provide your response to the challenge question selected during your IDM account registration and click the Unlock Account button.
7. You will receive an account unlocked success banner. Please navigate back to the HEDIS PLD Web-Portal log-in page, then use your IDM User ID and password to sign in.