

Issuer Onboarding & Enrollment Testing Primer

CMS zONE

zONE (<https://zone.cms.gov>) is CMS's collaboration site and repository for many important technical documents and other reference documentation. To request access to zONE, send a request to the CMS Help Desk at cms_feps@cms.hhs.gov. Once you have access to zONE, you will need to request access to the private Issuer community to gain full access to all documentation directed to Issuers.

EDI Registration Form

To start the onboarding process to accept EDI 834 Enrollment transactions and/or participate in Direct Enrollment with the FFM, Issuers must complete the EDI Registration Form, available on zONE:

- <https://zone.cms.gov/document/marketplace-edi-registration-form>

Please note: You must first log in to zONE before attempting to directly access any links to documentation.

Establishing Connectivity with CMS

After receipt of the EDI Registration Form, CMS will reach out to establish Electronic File Transfer (EFT) connectivity and, if requested, Direct Enrollment connectivity. The CMS EFT Team will establish an EFT folder from which you can access outbound EDI transactions from CMS and upload inbound EDI transactions to the FFM. Direct Enrollment allows for integration of the Issuer's website with the FFM via Secure Redirect to complete the eligibility determination process, followed by completion of the plan selection and enrollment process at the Issuer's site.

Test Data

To conduct Enrollment Integration Testing with the FFM, Issuers must use Test Data provided by CMS. Although initially designed with distinct data sets for EDI 834 Enrollment and Direct Enrollment Testing, any CMS data set can be in either type of testing. The following documents provide guidance on the contents and usage of the CMS data sets:

- <https://zone.cms.gov/document/issuer-enrollment-test-data-documentation>
 - Provides an overview of the household composition for each of the Direct Enrollment data set applications
- <https://zone.cms.gov/document/issuer-test-data-dictionary-0>
 - Provides details on each data element in the data sets, including those that can be freely customized by the Issuer during testing
- <https://zone.cms.gov/document/cms-issuer-edi-technical-work-group-slides>
 - EDI Slides_2013_0912.pdf - Slide 3 illustrates the household composition of each application in the Plan Preview data set
- <https://zone.cms.gov/document/ffm-ui-data-map>
 - Screenshots of the FFM UI, mapped to the elements in the test data sets

If your organization has not yet received test data sets from CMS, please send an e-mail to the CMS Help Desk with the subject line "Issuer Test Data Needed", with your organization's name, State, and HIOS ID to request data.

Remote Identity Proofing (RIDP) Test Data

As part of the consumer workflow in the FFM, the consumer must go through the remote identity proofing (RIDP) process. To emulate this verification in the test environment, a specific set of “persona” data must be used. This data is available on zONE at:

- <https://zone.cms.gov/document/ridp-test-data>

It is important to that for testing purposes, the RIDP data is to be used **only** for the identity proofing section in the FFM. This data cannot be used when building a household and filling out the eligibility application in the FFM. Once the proofing process is complete, data must be changed to one of the test applications in the EDI 834, Direct Enrollment or Plan Preview data sets.

Enrollment Integration Testing

The following documents provide context and guidance on Enrollment Integration Testing (either EDI 834 Testing via the FFM UI or Direct Enrollment Testing) in the CMS permanent testing environment, IMP1A:

- <https://zone.cms.gov/document/issuer-instructions-testing-ffm-direct-enrollment-be-prod-environment>
 - Provides general instruction and overview for EDI 834 Enrollment Testing via the FFM UI, including the RIDP process. Although written to address testing in the “To Be Prod” environment (now being prepared for Production), this document is also relevant to the testing conducted in IMP1A. The URLs needed to conduct this testing are provided in the next document.
- <https://zone.cms.gov/wiki/impla-permanent-testing-environment-url-end-points-and-credentials-0>
 - Provides URLs for EDI 834 Testing and Payment Redirect (routing to the Issuer’s payment portal after enrollment via the FFM) Testing, end points for Direct Enrollment Testing, and guidance on submitting testing issues to the CMS Help Desk (cms_feps@cms.hhs.gov).

Technical Reference Documents

- <https://zone.cms.gov/document/834-companion-guide-pre-clearance-draft>
 - Provides the latest EDI 834 Companion Guide.
- <https://zone.cms.gov/document/eft-file-naming-conventions>
 - Provides file naming conventions for exchanging files via CMS EFT.
- <https://zone.cms.gov/document/direct-enrollment-api-technical-specifications-draft-version>
 - Provides the latest Direct Enrollment API specs.
- <https://zone.cms.gov/document/applicant-eligibility-iepd-update>
 - Consists of a collection of artifacts, including the WSDL and schema files, which define and describe the structure and content of the Application Eligibility Service as described in the Technical Specification document for the Direct Enrollment API.
- <https://zone.cms.gov/document/direct-enrollment-iepd-update>
 - Consists of a collection of artifacts, including the WSDL and schema files, which define and describe the structure and content of the Application Enrollment Service as described in the Technical Specification document for the Direct Enrollment API.
- <https://zone.cms.gov/document/payment-redirect-transaction-details>
 - Provides the certificate and URL for Payment Redirect.