To: Issuers Participating on Maryland Health Connection

From: Maryland Health Benefit Exchange (MHBE) – Policy & Plan Management

Date: May 1, 2024

Re: SBMI Reconciliation

Per MHBE's Carrier Reference Manual, carriers are to engage in the SBMI process to reconcile enrollment and financial data. The SBMI reconciliation focus includes on time submission of files and reports, ensuring accuracy of files and reports, incident reporting, and SBMI touchpoint calls. MHBE is building a standardized process with the expectation that carriers will ensure the appropriate staff participate on scheduled calls and any other identified reconciliation efforts to correct enrollment discrepancies. The following guidance outlines this process.

- Carriers should participate in the bi-weekly (every other week) SBMI call established by MHBE. The cadence of these calls may change to weekly during periods of high volume and/or backlog of cases.
- In order to optimize the call time, carriers are required to have the appropriate staff present on SBMI calls. This should include those involved in identifying 834 file needs in order to achieve accurate enrollment for SBMI cases.
- MHBE has a formatted SBMI tracker that it will share with carriers to establish cases and track case needs and efforts.

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Goals:

- Discrepancies associated with financial years beyond 2 years should be resolved by the middle of the current year.
- Discrepancies associated with the previous year should be resolved by the end of the current year.
- Exchange and Carrier teams should contribute towards fixing the discrepancies and aim to close at least 30% of the discrepancies in each cycle.

Monthly submission dates for any SBMI cycle:

1st - 4th: Carriers to deliver Inbound files to MHBE.

5th - 10th: MHBE generates SBMI files and submit to CMS; 820 Submission to carriers for the previous month.

11th - 13th: CMS reviews and sends acknowledgment to MHBE.

14th - 15th: MHBE delivers SBMI file to Carriers (If these days fall on a weekend, the file will be sent on the first business day).

16th - 20th: Carriers to deliver Discrepancy Reports on SBMI/820.

21st - End of the month: MHBE prepares fixes for the next cycle.

All of the files mentioned above are mandatory transmission files and should not be skipped for any cycle. In addition, carriers need to ensure that the reports are sent back on time, are accurate, and in the format requested.