



MHBE Plan Management Stakeholder Committee

Thursday, March 7, 2026

2:00 PM – 3:00 PM

Virtual Meeting

Attendees:

Aarathi Narayanan, Allison Mangiaracino, Amanda Ballard, Amelia Marcus, Anusha Sundararajin, Becca Lane, Ben Lacomble, Brian Alula, Brian Espindola, Brittney Ryan, Catherine Kirk Robins, Christina Stafford, Dagemawit Kebede, David Cooney, Desiree Silay, Drina Quintana, Jay Smith, Jessica Galindo, Johanna Fabian-Marks, Jose Cabrera, Julie Curry, Katherine Wait, Kimberly Edwards, LaShan Brown, Lindbergh Carpenter Jr., Molly O'Brien, Pooja Singh, Raghuver Parupalli, Ross White, Shanette Baker, Srija Vutukuru, Suresh Arunachalam, Suzanne Schlattman, Tamara Cannida-Gunter, Theresa Bataglia, Warren Laird, Wonda Oliver

Welcome and introductions:

Nicole Edge, Manager of Plan and Partner Management, welcomed everyone and confirmed no updates for the March 2026 PMSC meeting minutes. March 2026 were accepted.

Agenda:

Topic	Member Comments
No comments or feedback from the field to begin the meeting.	
Carrier Interchange Enhancements	Lindbergh Carpenter Jr., MHBE Salesforce Project Manager, introduced the Salesforce team and an upcoming enhancement project aiming to improve communication workflow and case tracking visibility. Nicole Edge asked for carriers to provide suggestions and improvement requests by Friday, May 15, 2026. • Requirements gathering session with all carriers will be scheduled soon. • Implementation date TBD.

	Comments/Feedback from participants: No questions or feedback
Plan Management Updates	• Carriers were reminded of due date for SERFF binders and additional information. • The value plan transparency attestation is included in the carrier application for 2026, but carriers must also submit URLs to Plan Management. • During this year's plan certification, user acceptance testing will be available for small business. Extracts and production plan preview will also be a part of small business plan certification. • Carriers should be in receipt of the missing effectuation report detailing. These reports will be used to reconcile state subsidy payments not paid to carriers. For SBMI, CMS will continue to report state subsidy payments for the purpose of reconciliation. • The list of HBX updates from plan management was shared and will be implemented July 31, 2026. Comments/Feedback from participants: • LaShan Brown, Kaiser Permanente asked if the extraction cycle for small business will be the same as the cycle for the individual market. Nicole Edge responded that the cycle might not be exact to the day but should be within the same week. There might be a one- or two-day delay between extracts for the two markets. .
EDI Updates	Srija shared the following information: • The process for inbound transactions to cancel or terminate a household (inbound transactions from carriers to MHBE). • Confirmation or responses for all outbound 834 transactions (outbounds from MHBE to carriers). This includes all change transactions. • The renewal 834 testing timeline was shared. Hadassa shared the following regarding reconciliation: • MHBE is creating a reconciliation dashboard that will aid in monitoring and strengthening the reconciliation process. A monthly report capturing reconciliation progress will also be shared with each carrier.

	• In July 2026, MHBE will share an enrollment snapshot with each carrier. This enrollment cleanup initiative will increase alignment leading to a more accurate renewal process. • MHBE will begin generating a broker reconciliation report to include the broker attached to an enrollment. Comments/Feedback from participants: • Drina Quintana, Kaiser Permanente, if the testing cycle is for both individual and small business. Srija responded that this is for the individual market only. The timeline for small business will be released at the roundtable meeting. • Julie Curry, United Health Care, asked if the EDI transaction information had an implementation date. Srija confirmed that these policies are already required and included in the 834 Companion Guide. However, the clarification that effectuations apply to financial transactions needed to be updated. Julie also asked for the updated release date of this year's 834 Companion Guide. Srija confirmed that this is expected to be released, Friday, May 15, 2026. • Aarathi Narayanan, Kaiser Permanente, asked for clarification about the enrollment report MHBE will send in July 2026. Hadassa responded that the expectation is for enrollments to be corrected, the same as MHBE's expectations once the orphan report is released. The goal is to align enrollments; carriers should send effectuations or other transactions to correct enrollments. Nicole shared that these additional reconciliation processes will be used in the upcoming service level expectations MHBE.

Discussion: No additional comments or questions to end the meeting.

Adjournment:

Meeting Adjourned 2:35 pm