

Plan Management Stakeholder Committee Meeting

Thursday, May 7, 2026

2026 PMSC Schedule

- ✦ March 5th – 2026 Carrier Authorization & Plan Certification Timeline
- ✦ May 7th – Plan Year 2027 Updates, Plan Certification Materials, Legislative Wrap-up, ECP Updates, 2026 IT/EDI Roadmap
- ✦ July 2nd – Testing schedule, Renewal schedule, Template Check In, HBX Updates, UAT Schedule
- ✦ September 3 – Open Enrollment Updates, Open Enrollment Marketing Plan (Buys & Engagement), Renewal Check In, Draft Certification Standards, Draft Annual Letter to Issuers Timeline,

Plan Management



Plan Certification Updates & Reminders

The following are a few updates and reminders about Plan Certification. Please make sure to refer to the carrier certification checklist for clarity on any certification documents, collection path, or due dates.

- ✦ Binders are due in SERFF no later than Monday, June 1, 2026.
- ✦ Additional documents should be submitted to Plan Management no later than, Monday, June 1, 2026.
- ✦ The attestation for the Value Plan Website Transparency requirement is included on the carrier application for PY 27. Carriers will still need to provide URLs to Plan Management by Friday, October 16, 2026.
- ✦ Beginning this year, carriers will be required to sign off after user acceptance testing, confirming that all plan data has been reviewed.

Small Business Plan Certification

Carriers offering small business plans will need to engage with Plan Management to complete the following:

- ✦ User Acceptance Testing
- ✦ Extract cycles
- ✦ Production Plan Preview

State Subsidy Loss

MHBE is tracking state subsidy losses for enrollments missing an effectuation from carriers. Each month, MHBE will send a report capturing missing effectuations in three categories: 30–60 day, 60-90 day, and >90 day.

MHBE will record state subsidy payments not made to carriers due to effectuations not received within 90 days of the enrollment effective date. This amount will be included on the monthly report issued to carriers.

Unpaid state subsidy amounts will be reported to CMS during the SBMI process; however, CMS may continue to include full state subsidy on reports it sends to carriers for the purpose of reconciling total premium payment amounts.

HBX Updates

The following updates will be implemented July 31, 2026:

- ✦ Auto Pay Text to be displayed once a consumer completes enrollment
- ✦ Provider directory updates and enhancements
- ✦ Addition of network to SADP shopping plan tile (DHMO/PPO)
- ✦ Flag indicating ECP standard is not met (SADP only)



Questions? Contact Nicole.Edge@maryland.gov

PMSC Presentation from MHBE IT

May 07, 2026



EDI Updates

Inbound Terminations

- Carrier-initiated cancellations or terminations should always contain entire household information sent in the original 834 transaction. Inbound cancellations or terminations sent with subscribers only will not term the entire policy which will leave the dependents still active at MHBE.

Inbound Effectuations

- We would require confirmation/effectuation for all the 834 transactions.
- Eg: APTC Change, Policy Change, Plan Change & Demographic Change.

Late Effectuations

- Monthly report on Late Effectuations will be published to the carriers. Report will be categorized based on the effectuations received in 30 days, 60 to 90 days and beyond 90 days.

2027 Renewal Testing Timeline

Testing Tasks	Planned Start Date	Planned End Date
Carrier Test Case Preparation	29-Jun	3-Jul
Carrier Review and Feedback	29-Jun	3-Jul
Test Bed Preparation for Carrier Testing	6-Jul	10-Jul
Carrier Cycle 1 Testing	13-Jul	17-Jul
Carrier Cycle 2 Testing	20-Jul	24-Jul
Carrier Sign Off	27-Jul	27-Jul

Recon Updates

Reconciliation Dashboard

- Discrepancy Trends
- Problem Areas
- Effectiveness of Reconciliation

Broker Reconciliation

- Monthly Report of active enrollments tangoed to a broker

Questions & Comments

