

**CAQH Committee on Operating Rules for Information Exchange (CORE)
CAQH CORE Certification & Testing Subgroup (CTSG)
Call #2: Thursday, December 13, 2018, 2:00-3:30 pm ET Conference Call**

Call Summary for Certification & Testing Subgroup (CTSG) Call #1 – 11/20/18

Co-chairs:

**Joe Holtschlag, athenahealth
Megan Soccorso, Cigna**

This document contains:

- Agenda items and key discussion points.
- Decisions and actions to be taken.
- Next steps.
- Call attendance.

<i>Agenda Item</i>	<i>Key Discussion Points</i>	<i>Decisions and Actions</i>
1. Antitrust Guidelines	<ul style="list-style-type: none"> • Megan Soccorso (Cigna) opened the call and introduced herself and Joe Holtschlag (athenahealth) as CAQH CORE Certification & Testing Subgroup (CTSG) Co-chairs facilitating the call. • Megan Soccorso (Cigna) reviewed the Antitrust Guidelines, noting that they are published on the CAQH CORE Calendar along with the meeting materials. • Megan Soccorso (Cigna) handed the call to Taha Anjarwalla (CAQH CORE Manager). 	<i>Discussion</i>
2. Roll Call and Administrative Items	<ul style="list-style-type: none"> • Taha Anjarwalla (CAQH CORE Manager) called roll. [See call participant roster at the end of this meeting summary to view call attendees and affiliated organizations]. • Megan Soccorso (Cigna) reviewed the three call documents: <ul style="list-style-type: none"> ○ Doc #1: Agenda CTSG Call #1 11.20.18.pdf ○ Doc #2: LevelSetPPT CTSG 11.20.18.pdf ○ Doc #3: Draft PV PA Operating Rules.pdf • Megan Soccorso (Cigna) reviewed the focus of the call, which was to: <ul style="list-style-type: none"> ○ Provide background on CORE Certification. ○ Review the Draft Phase V CAQH CORE Prior Authorization Operating Rules. ○ Review CAQH CORE Certification & Testing Subgroup Goal, Role, Work Plan, and General Procedures. ○ And discuss Next Steps. 	<i>Discussion</i>
3. Background on CORE Certification (Doc #2, Slides 3-6).	<ul style="list-style-type: none"> • Summary of Certification & Testing Subgroup discussion on CORE Certification. <ul style="list-style-type: none"> ○ Megan Soccorso (Cigna) referred the subgroup to Doc #2 and proceeded with agenda item #3. ○ Megan Soccorso (Cigna) provided background on the CORE Certification Program and guiding principles. <ul style="list-style-type: none"> ▪ No questions or comments were raised by the subgroup. ○ Megan Soccorso (Cigna) handed the call back to Taha Anjarwalla (CAQH CORE Manager) ○ Taha Anjarwalla (CAQH CORE Manager) reviewed the CORE Certification process. <ul style="list-style-type: none"> ▪ No questions or comments were raised by the subgroup. 	<i>Discussion</i>

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	<ul style="list-style-type: none"> ○ Taha Anjarwalla (CAQH CORE Manager) handed the call to Joe Holtschlag (athenahealth). 	
4. Draft Phase V CAQH CORE Prior Authorization Operating Rules (Doc #2, Slides 7-11).	<ul style="list-style-type: none"> ● Summary of Subgroup discussion on the Draft Phase V CAQH CORE Prior Authorization Operating Rules. <ul style="list-style-type: none"> ○ Joe Holtschlag (athenahealth) reviewed past efforts for drafting the Phase V CAQH CORE Prior Authorization Operating Rules. <ul style="list-style-type: none"> ▪ No questions or comments raised by subgroup. ○ Joe Holtschlag (athenahealth) handed the call to Bob Bowman (CAQH CORE Director) ○ Bob Bowman (CAQH CORE Director) reviewed the Phase V CAQH CORE Prior Authorization Operating Rules. <ul style="list-style-type: none"> ▪ Heather McComas (AMA) asked if certification for the Web Portal rule would apply to providers, as she believed the rule is directed toward health plans. ▪ Bob Bowman (CAQH CORE Director) responded that many Web Portal rule requirements are focused on health plans or vendors who have products in the marketplace/their own portal solution. Further, many organizations have outsourced prior authorization work to UMOs or other groups, and those groups can become CORE certified. ▪ Bob Bowman (CAQH CORE Director) noted that there are different types of test scripts: transaction testing, document uploads and attestations. The Subgroup will have to consider how specific stakeholder types will show conformance with one of the three types of test scripts. ○ Bob Bowman (CAQH CORE Director) asked if there were any other questions then handed the call to Megan Soccorso (Cigna). 	<i>Discussion</i>
5. CAQH CORE Certification & Testing Subgroup Goal, Role, Work Plan, and General Procedures (Slides 12-18).	<ul style="list-style-type: none"> ● Summary of Subgroup discussion regarding CTSG Goals, Role, Work Plan, and General Procedures: <ul style="list-style-type: none"> ○ Megan Soccorso (Cigna) reviewed the goals of the Certification & Testing Subgroup, elements of a CAQH CORE Certification Test Suite, and Phase V CAQH CORE Prior Authorization Operating Rule Development Timeline. <ul style="list-style-type: none"> ▪ No questions or comments were raised by the subgroup. ○ Megan Soccorso (Cigna) handed the call to Joe Holtschlag (athenahealth) ○ Joe Holtschlag (athenahealth) reviewed the CAQH CORE voting process and subgroup expectations and responsibilities. <ul style="list-style-type: none"> ▪ No questions or comments were raised by the subgroup. ○ Joe Holtschlag (athenahealth) then proceeded with agenda item #6. 	<i>Discussion</i>
6. Next Steps for CAQH CORE Certification and	<ul style="list-style-type: none"> ● Summary of Subgroup discussion regarding CTSG next steps. <ul style="list-style-type: none"> ○ Joe Holtschlag (athenahealth) closed the call and reviewed the next steps: 	<u>Actions/Responsibilities:</u> <ul style="list-style-type: none"> ● Agreed to next steps

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Testing Subgroup (Slide 19-20).	<ul style="list-style-type: none"> ▪ Participate in Call #2: Thursday, 12/13/18 2:00 – 3:30 PM ET. ▪ Review and become familiar with the Phase IV CAQH CORE Certification Test Suite and Draft Phase V CAQH CORE Prior Authorization Operating Rules. ▪ Optional: Read prior CAQH CORE Phase I, II, III and IV Operating Rules. ▪ Encourage colleagues with subject matter expertise and/or topical interest to join the Certification & Testing Subgroup. <ul style="list-style-type: none"> • CAQH CORE Staff & Co-Chairs Next Steps: <ul style="list-style-type: none"> ○ Draft a Call Summary for today’s call. ○ Prepare a draft of the Phase V CAQH CORE Voluntary CORE Certification Test Suite. 	

Call Documentation
Doc 1: Agenda CTSG Call #1 11.20.18.pdf
Doc 2: LevelSetPPT CTSG 11.20.18.pdf
Doc 3: Draft PV PA Operating Rules.pdf

CAQH CORE Contact Information

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CAQH CORE Certification & Testing Subgroup Roster

CAQH CORE Participating Organization	Last Name	First Name	Attended
Accenture	Koul	Swati	
Aetna	Bakos	Janice	
Aetna	Stine	Merri-Lee	
American Medical Association (AMA)	McComas	Heather	X
American Medical Association (AMA)	Lefebvre	Celine	X
Ameritas Life Insurance Corp.	Wordekemper	Lori	
Ameritas Life Insurance Corp.	Ninneman	Kyle	
Anthem Inc.	Lehman	Nancy	
athenahealth	Holtschlag	Joe	X
Blue Cross and Blue Shield Association (BCBSA)	Kocher	Gail	
Blue Cross Blue Shield of Michiga	Monarch	Cindy	
Blue Cross Blue Shield of North Carolina	Maness	Christine	
Blue Cross Blue Shield of Tennessee	Langford	Susan	X
Centers for Medicare and Medicaid Services (CMS)	Cabral	Michael	
Centers for Medicare and Medicaid Services (CMS)	Odia	Godwin	
Cigna	Soccorso	Megan	X
ClaimRemedi	Friedrich	Timothy	
Cognosante	Lambert	Dora	X
DST Health Solutions	Lynam	Mary	X
EmblemHealth	Seepersaud	Dhanwanti	
Experian	Wolskij	Beth	
Harvard Pilgrim Health Care	Starkey	Rhonda	X
Healthcare Financial Management Association	Wolfskill	Sandra	X
Humana	Savicki	Lisa	
Humana	Peterson	Amy	X
Humana	Jamison	Sandra	
Medical Group Management Association (MGMA)	Tennant	Robert	X
Michigan Department of Community Health	Veverka	C	X
PaySpan	Cunningham	Eric	
Tata Consultancy Services Ltd	Kumari	Sushmita	X
Work Group for Electronic Data Interchange (WEDI)	Stellar	Charles	