

**CAQH Committee on Operating Rules for Information Exchange (CORE)
EFT & ERA Enrollment Task Group Call #1
Call Summary: Tuesday, August 15, 2023, 1:00-2:00 pm ET**

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. Welcome, Antitrust Guidelines, and Participant Dashboard (Doc #1 Slides 1-3)	<ul style="list-style-type: none"> • Zach VanTrieste (JP Morgan) opened the call and welcomed everyone to the group. Zach also reviewed the antitrust guidelines, administrative items, and reviewed the agenda items. • Kaitlin Powers (CAQH) conducted roll call. <ul style="list-style-type: none"> ○ [See call participant roster at the end of this meeting summary to view call attendees and affiliated organizations]. 	Discussion
2. Level Set (Doc #1 Slides 4-11)	<ul style="list-style-type: none"> • Zach VanTrieste gave a high-level overview of CAQH CORE's mission, vision, and industry role. • Zach VanTrieste overviewed the approach and progression of operating rule development CORE deploys for drafting rules. • Zach VanTrieste reviewed the scope, goals, and timelines for the Task Group. • Zach VanTrieste introduced himself as a Task Group co-chair and passed the call to the other co-chairs for them to introduce themselves to the group. They include Erica Martin (AMA) and Kiana Fitchett (Horizon BCBS NJ). • Zach VanTrieste reviewed a breakdown of task group participants, participant expectations and responsibilities for task calls, and any additional work, such as straw polling and call preparation. 	Discussion
3. Background (Doc #1 Slides 12-15)	<ul style="list-style-type: none"> • Erica Martin (AMA) provided an orientation of the EFT & ERA Data Enrollment Rules and reviewed high-level rule requirements. • Erica Martin summarized the EFT & ERA Data Enrollment Groups and walked through an example data set. • Erica Martin reviewed the CORE EFT & ERA Enrollment Data Rules maintenance process, noting that updates to the data sets are recognized under HIPAA and do not require a new federal regulation. However, any substantive revisions or updates to the EFT & ERA Enrollment Data Rules beyond the data sets must be made through the federal rulemaking process. 	Discussion
4. Overview of Opportunity Areas (Doc #1 Slides 16-23)	<ul style="list-style-type: none"> • Erica Martin provided an overview of five opportunity areas for the task group to consider as part of the rule update. These opportunity areas include enhancements to data sets, flexible data sets, fraud detection, bulk enrollment, and notifications. • Kaitlin Powers (CAQH) reviewed Opportunity Area #1: Enhancements to Data Sets. Two rule options were presented: refine data element group and add/remove data elements. • Kaitlin Powers reviewed Opportunity Area #2: Flexible Data Sets. Two rule options were presented: adjust sequence/ordering of DEGs and Externalize Data Enrollment Sets from the Operating Rule. <ul style="list-style-type: none"> ○ One task group member commented that adjusting the sequencing/ordering of the data sets should not be allowed during processing to ensure standardization and uniformity. ○ Bob Bowman (CAQH) indicated that this opportunity area could help to support the population and display of dynamic enrollment forms during intake. • Kaitlin Powers reviewed Opportunity Area #3: Fraud Detection Sets. One rule option was presented: 	Discussion

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	<p>determine required data for fraud detection.</p> <ul style="list-style-type: none"> • Taha Anjarwalla (CAQH) reviewed Opportunity Area #4: Bulk Enrollment. One rule option was presented: determine the necessary data for bulk enrollment. • Taha Anjarwalla reviewed Opportunity Area #5: Notifications of Enrollment, Disenrollment, or Updates. Three rule options were presented: establish confirmation requirements, define a timeframe for notifications policies to promote EFT/ERA Adoption. <ul style="list-style-type: none"> ○ One task group member provided feedback that notification processes and timeframes may differ between single-provider and bulk-provider enrollment. 	
<p>5. Next Steps (Doc #1 Slides 24-26)</p>	<ul style="list-style-type: none"> • Erica Martin reviewed the next steps and expressed the importance of straw poll completion in guiding the discussions and rule requirement development. Straw Poll #1 will be distributed on Tuesday, August 22nd. The next Task Group call will be held at 1:00 PM EST on Tuesday, September 19th. <ul style="list-style-type: none"> ○ CORE EFT & ERA Enrollment Co-Chairs & Staff: <ul style="list-style-type: none"> • Distribute Straw Poll #1 to participants by Tuesday, 08//22/2023, end of day. • Draft a call summary for today's call and make it available on the CORE Participant Dashboard for participants to review. • Analyze the results of Straw Poll #1 in preparation for Call #2 on Tuesday, September 19th. ○ EFT & ERA Enrollment Task Group Participating Organizations: <ul style="list-style-type: none"> • Complete Straw Poll #1 by Tuesday, September 5th EOD. • Participate in Call #2 on Tuesday, September 19th from 1:00-2:00PM EST. 	<p><u>Action required:</u> <i>Agreed to Next Steps.</i></p>

Call Documentation

Doc 1: EDTG Call 1 Deck 08.15.23.pdf

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CAQH CORE Contact Information

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Taha Anjarwalla
Associate Director, CORE
tanjarwalla@caqh.org

Kaitlin Powers
Sr. Associate, CORE
kpowers@caqh.org

Organization	Name	Attendance
Aetna	Kathleen Bell	
Aetna	Amy Neves	
Aetna	Kellene Parthermore	
AMA	Erica Martin	Y
AMA	Heather McComas	
AMA	Rob Otten	
Ameritas Life Insurance Corp.	Sue Nemec	Y
Ameritas Life Insurance Corp.	Kyle Ninneman	Y
ASC X12	Michelle Barry	
ASC X12	Cathy Sheppard	
athenahealth	Andrew Appler	Y
Availity, LLC	Tonya Moffit	
Availity, LLC	Katie Reighard	
Availity, LLC	Kathy Sites	
Blue Cross Blue Shield of Michigan	Amy Hall	Y
Blue Cross Blue Shield of Michigan	Carol Larson	
Blue Cross Blue Shield of Michigan	Ann McNeilly	Y
Blue Cross Blue Shield of Michigan	Cindy Monarch	

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Organization	Name	Attendance
Change Healthcare	Trisa Ries	
Change Healthcare	Liz Weier	Y
CIGNA	Jackie Jackson	
CIGNA	Jeffrey Narog	
Cognizant	Patricia Wijtyk	
Cognosante	Andy Koduru	
CSRA	Laura Caldwell	
Elevance Health	Kelly Lenihan	
Gainwell Technologies	Megan Soccorso	
Health Care Service Corp	Yvonna Cosey	
Health Care Service Corp	Andrea Huffstetler	Y
Horizon Blue Cross Blue Shield of New Jersey	Athalage Bandula	
Horizon Blue Cross Blue Shield of New Jersey	Kiana Fitchett	
Horizon Blue Cross Blue Shield of New Jersey	Penny Lewnes-King	
Humana	Olivia Rauter	
JP Morgan Healthcare Payments	Zach VanTrieste	Y
Kaiser Permanente	Loleta Bethea	Y
Kaiser Permanente	Maria Gonzalez	
Lab Corp	Kelly Baker	Y
Lab Corp	Ghesha-Ly Rosario Diaz	
Lab Corp	Jennifer Snipes	Y
Massachusetts General Brigham	Rachel Correia	
Massachusetts General Brigham	Kevin Mulcahy	
Montefiore	Erin Miller	
Montefiore	Christopher Stumpo	
Montefiore	Edward Yuabov	Y
NACHA	Cari Conahan	Y
NACHA	Mike Herd	
NACHA	Brad Smith	Y

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Organization	Name	Attendance
NCPDP	Teresa Strickland	
NCPDP	Margaret Weiker	
North Dakota Medicaid	Tammy Henderson	
OSF Healthcare	Kris Alcorn	Y
OSF Healthcare	Effie Hoffman	
OSF Healthcare	Rene Utley	
PeaceHealth	Marie Becan	Y
PeaceHealth	Lyn Jackson	
PNC Bank	Regina Davis	
State of Michigan Medicaid	Diana Fuller	Y
State of Michigan Medicaid	Chuck Veverka	Y
Tata Consultancy Services Ltd	Kevin OSullivan	
The SSI Group, Inc.	Alicia Brownlow	
The SSI Group, Inc.	Martine Steiger	
TriZetto Corporation, A Cognizant Company	Andy Schulz	
United States Department of Veterans Affairs	Stephanie Farley	Y
United States Department of Veterans Affairs	Katherine Knapp	Y
UnitedHealthGroup	David Collins	Y
WEDI	Robert Tennant	
Zelis	Megan Milner	Y
Zelis	Megan Olson	Y