

**CAQH Committee on Operating Rules for Information Exchange (CORE)
Review Work Group Call #3
Call Summary: Thursday, November 16, 2023, 2:00-3:30 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 1-4)	<ul style="list-style-type: none"> • Kaitlin Powers (CORE) opened the call, welcomed everyone to the group, and conducted roll call. Ms. Powers reviewed the antitrust guidelines, administrative items, and agenda items. <ul style="list-style-type: none"> ○ [See call participant roster at the end of this meeting summary to view call attendees and affiliated organizations]. 	<i>Discussion</i>
2. Summary of 10/19/23 Work Group Call (Doc #2)	<ul style="list-style-type: none"> • Ms. Powers provided a summary of RWG Call #2: <ul style="list-style-type: none"> ○ RWG Call #2 reviewed the results of Straw Poll #1 along with the relevant operating rules for discussion, including the Health Care Claim (837) Data Content Rule and Health Care Claim Acknowledgement (277CA) Data Content Rule. • Ms. Powers asked the group for a motion to approve the call summary. 	<p><u>Action required:</u></p> <ul style="list-style-type: none"> • Approved 10/19/2023 call summary. • Motion to approve by Margaret Weiker (NCPDP) and seconded by Robert Tennant (WEDI).
3. Level Set (Doc #1 Slides 5-7)	<ul style="list-style-type: none"> • Donna Campbell (HCSC) reviewed the scope, goals, and timeline of the Review Work Group (RWG), including the updated and newly drafted operating rules for the group to review. • Ms. Campbell noted that the RWG is focused on three sets of operating rules related to value-based payments, health care claims, and EFT/ERA enrollment. • Ms. Campbell also noted that the results of Straw Poll #2, which focused on the draft Health Care Claims Data Content rules for the X12 837 and X12 277CA transactions, will be reviewed in today's meeting. Ms. Campbell also reiterated the timeline, noting the RWG was on track to have considered each rule set by late November/early December 2023, with final approval in late December 2023. 	<i>Discussion</i>
4. Draft Health Care Claims Operating Rules Straw Poll #2 Results (Doc #1 Slides 8-20)	<ul style="list-style-type: none"> • Pete Benziger (CORE) and Mike Phillips (CORE) reviewed the results of Straw Poll #2 and the comments received. • Summary of RWG Discussion: <ul style="list-style-type: none"> ○ Comments received regarding CORE Benefit Enrollment and Maintenance Data Content Rule: <ul style="list-style-type: none"> – While Mr. Benziger reviewed the points of clarification received regarding the Health Care Claims Data Content Rule, Susan Langford (BCBS-TN) asked for clarification regarding point of clarification #3, Section 3.2.1 of the rule. Ms. Langford asked if health plans should reject claims that do not have the Place of Service (POS) codes 02 or 10. Bob Bowman (CORE) responded to Ms. Langford, noting that the intent of the rule is to provide consistency across the industry for the use of POS codes. Mr. Bowman stated that health plans may determine 	<i>Discussion</i>

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	how they build their systems and adjudicate their claims.	
5. Draft EFT & ERA Enrollment Data Operating Rules (Doc #1 Slides 21-25)	<ul style="list-style-type: none"> • Taha Anjarwalla (CORE) reviewed the draft EFT & ERA Enrollment Data Operating Rules and provided RWG participants with an overview of the rules and their establishment of a maximum set of standard data elements, a clear flow for electronic data collection, and a safe harbor. Mr. Anjarwalla noted that these proposed rules will be included in Straw Poll #3. 	
6. Next Steps (Doc #1 Slides 26-28)	<ul style="list-style-type: none"> • Ms. Campbell reviewed the next steps and expressed the importance of Straw Poll completion in guiding the discussions and operating rule refinement. Straw Poll #3 will be distributed on November 27th and the next RWG call is at 2:00 PM EST on Thursday, December 14th. <ul style="list-style-type: none"> ○ CORE RWG Co-Chairs & Staff: <ul style="list-style-type: none"> - Distribute Straw Poll #3 to participants by 11/27/2023, 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 #3 in preparation for Call #4 on Thursday, December 14th. ○ RWG Participating Organizations: <ul style="list-style-type: none"> - Complete Straw Poll #3 by December 8th, EOD. - Participate in Call #4 on Thursday, December 14th, from 2:00-3:30 PM EST. 	<p><u>Action required:</u></p> <ul style="list-style-type: none"> • Agree to Next Steps.

<i>Call Documentation</i>
Doc 1: RWG Call 4 Deck 12.14.23.pdf
Doc 2: RWG Call 3 Summary 11.16.23.pdf

CORE Contact Information

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Organization	Name	Attendance
Aetna	Rose Hodges	
Aetna	Kellene Parthemore	
Aetna	Mark Warren	
Aetna	Heather Morgan	
Aetna	Mark Rabuffo	Y
Aetna	Marianne Davidson	Y
Aetna	Matthew Burkard	
American Hospital Association (AHA)	Terrence Cunningham	
American Hospital Association (AHA)	Andrea Preisler	Y
American Medical Association (AMA)	Heather McComas	Y
American Medical Association (AMA)	Nancy Spector	Y
American Medical Association (AMA)	Erica Martin	Y
Ameritas Life Insurance Corp.	Noah Mastel	
Ameritas Life Insurance Corp.	Kristina Steece	
Arizona Health Care Cost Containment System	Era Rodriguez	
Aspen Dental Management	Margaret Schuler	
athenahealth	Emidio DePina	Y
Availity, LLC	Tonya Moffitt	
Availity, LLC	Michelle Barry	
Blue Cross Blue Shield- Illinois	Donna Campbell	Y
Blue Cross Blue Shield- Illinois	Brian Pickens	Y
Blue Cross Blue Shield- Michigan	Cynthia Monarch	Y
Blue Cross Blue Shield – North Carolina	Heather Sammons	Y
Blue Cross Blue Shield- Tennessee	Susan Langford	Y
Centers for Medicare and Medicaid Services (CMS)	Daniel Kalwa	Y
Change Healthcare	Nathaniel Boer	
Change Healthcare	Kristin Thonsgaard	Y

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Organization	Name	Attendance
CIGNA	Meredith Ray	Y
ClaimMD	Nihal Titan	
Cognizant	Patricia Wijtyk	
Cognosante	Daniel Saunders	Y
Edifecs	Cristina Boincean	
Elevance	Meg Kutz	
Elevance	Christol Green	
Epic	James Habermann	Y
Epic	Benjamin Tarmann	
Gainwell Technologies	Megan Soccorso	
Health Care Service Corporation (HCSC)	Andrea Huffstetler	
Healthcare Financial Management Association (HFMA)	Shawn Stack	
Healthcare Financial Management Association (HFMA)	Katie Gilfillan	
HEALTHeNET	Christopher Gracon	Y
Horizon	Athalage Bandula	Y
Laboratory Corporation of America	Gheisha-Ly Rosario Diaz	Y
Michigan Medicaid	Chuck Veverka	
Michigan Medicaid	Diana Fuller	Y
NACHA The Electronic Payments Association	Brad Smith	Y
National Association of Health Data Organizations (NAHDO)	Charles Hawley	Y
National Council for Prescription Drug Programs (NCPDP)	Margaret Weiker	Y
NextGen Healthcare Information Systems, Inc.	Nancy Team	
OhioHealth	Mary Alexander	
OptumInsight	Everet Ford	
OptumInsight	Tara Rose	Y
OptumInsight	Lynn Chapple	
OSF Healthcare	Rene Woerner-Utley	

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Organization	Name	Attendance
PeaceHealth	Marie Becan	Y
Point32Health	Monal Patel	Y
SS&C Health	Nina Boldosser	
Tata Consultancy Services Ltd	Mary Sussman	Y
TriZetto Corporation, A Cognizant Company	Dawn Duchek	Y
United States Department of Veterans Affairs	Stephanie Farley	Y
UnitedHealthGroup	Holly Gilligan	Y
Work Group for Electronic Data Interchange (WEDI)	Robert Tennant	Y