

The Financial Management Vendor REST Service Specifications

CONTAINS CONFIDENTIAL INFORMATION

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Table of Contents

| | |
|---|----------|
| The Financial Management Vendor REST Service Specifications | 0 |
| C o n t a i n s C o n f i d e n t i a l I n f o r m a t i o n | 0 |
| 1 Scope | 2 |
| 2 Operations | 2 |
| 2.1.1 Response Interface..... | 2 |
| 2.1.2 Response Header..... | 3 |
| 2.1.3 Response Codes | 3 |
| 3 Service Faults | 5 |
| 4 Usage Sequences – Quick Reference | 6 |
| 4.1.1 Adding an individual member for the first time (not belonging to an SHOP)..... | 6 |
| 5 Service Contracts..... | 6 |
| 5.1 Carrier API..... | 6 |
| 5.1.1 Add Carrier | 6 |
| 5.1.2 Add Carrier Plan | 7 |
| 5.2 Subscriber API..... | 8 |
| 5.2.1 Add Member Unit..... | 8 |
| 6 Shared..... | 9 |
| 6.1.1 Data Contracts..... | 9 |
| 6.1.2 References..... | 25 |

1 Scope

This document defines services that can be used by Heath Programs to communicate with a financial management vendor for enrollment, and payments. The financial management vendor uses HTTP request methods for an easy to use REST API endpoint structure.

2 Operations

Each service exposes a set of operations.

When an API method is called the connection is kept open until the call completes. Successful operations return a `OperationResult` with a blank `MessageID` field since there is not a request message to correlate. If a call fails, a service fault is returned.

2.1.1 Response Interface

OperationResult

| Field | Data Type | Max Size | Required | Notes / Valid Values |
|-----------|---------------------------------|----------|----------|---|
| MessageID | string | | | This is the correlation ID returned when an synchronous operation was called. It is used to relate this result with the originating call. |
| Results | CommandResult[] | | | |

CommandResult

| Field | Data Type | Max Size | Required | Notes / Valid Values |
|------------|-----------|----------|----------|----------------------|
| EntityID | integer | | | |
| EntityType | string | | | |
| ProgramID | string | | | |
| Code | string | | | Success Failure |
| Reason | string | | | |

| Field | Data Type | Max Size | Required | Notes / Valid Values |
|--------------|-------------------------------|----------|----------|---|
| Description | string | | | Detail information about the error |
| Descriptions | Description[] | | | Detail information about success or failure. The number of rows depends on Plan Source Types supported by Program. |

Description

| Field | Data Type | Max Size | Required | Notes / Valid Values |
|-------------|-----------|----------|----------|---|
| Description | string | | | Detail information about success or failure for each plan source type. [Customer Name] [HBE Customer ID] succeeded [Customer Name] [HBE Customer ID] failed – [Description] |

2.1.2 Response Header

| | |
|------------------|--|
| Response Headers | { "date": "day, dd mon yyyy hh:mi:ss GMT", "server": "Microsoft-IIS/7.5", "x-powered-by": "ASP.NET", "content-length": "length", "content-type": "application/json; charset=utf-8" } |
|------------------|--|

2.1.3 Response Codes

| HTTP Status Code | Possible Reasons |
|------------------|--|
| 200 (Success) | Request processed successfully Request processed and failed validation checks. Customer will need to review response for correction |
| 400 (BadRequest) | Request is null Customer ID provided in the request has invalid format Request has missed required fields or field have incorrect format |
| 403 (Forbidden) | Client's certificate is not provided in the request |
| 404 (NotFound) | Client's certificate provided with the request is not configured for customer from request data |

| | |
|---------------------------|---|
| 500 (InternalServerError) | Request has missed required fields or field have incorrect format Request processed and failed validation checks. Customer will need to review response for correction |
|---------------------------|---|

DRAFT

3 Service Faults

All Fault Messages have two fields: Code – the error condition in a machine readable format, and Reason – the error condition in a human readable format. Code values will always match the following table; however, the Reason text may vary according to the context.

| Reason | Description |
|---------------------|--|
| InternalServerError | This is a general error condition not covered by a more specific fault. |
| OperationNotFound | The specified operation is not defined by the service (Verify WCF enforces this) |
| IncorrectFormat | The request message or one or more of the fields in the request message is not in the correct format. This can include missing required values. |
| ItemDoesNotExist | The requested item e.g. Plan or Payer does not exist for the provided ID. |
| ItemAlreadyExists | In an Add operation, the requested item e.g. Plan or Payer already exists. |
| NotLegitimateParent | The parent ID specified in the message is not correct for the item. |
| ItemsReferenced | If we do not allow cascade deletes then this is sent if there is another item dependent on the one being deleted e.g. a Plan still exists for the payer. |

4 Usage Sequences – Quick Reference

4.1.1 Adding an individual member for the first time (not belonging to an SHOP)

| # | Step | API Method to Call | Details |
|---|-----------------------|----------------------------------|---|
| 1 | Adding a Carrier | Add Carrier | This method is used to load a Carrier and all the plans related to the given Carrier into the system. |
| 2 | Adding a Carrier Plan | Add Carrier Plan | This method is used to load a Carrier Plan to a carrier that has already been entered into the system. AddCarrier method can be used to add all the plans at the same time a Carrier is being loaded into the system. |
| 4 | Adding Members | Add Member Unit | Once the Carrier and Carrier plans have been loaded into the system, this method is used to load one member at a time. |

5 Service Contracts

5.1 Carrier API

This API is used to manage carriers and their plans. Plans can be created along with a carrier when it is created. The financial management vendor will collect premiums for carriers. These premiums are remitted through ACH. The financial management vendor uses the remittance contact information to communicate with the carrier regarding remittance issues. For these reasons both ACH information and remittance contact information is required when creating a carrier.

5.1.1 Add Carrier

| Parameters | Data Type | Max Size | Required | Notes / Valid Values |
|-------------------|-------------------------|----------|--|--|
| CustomerID | int | | Yes | An ID provided by The financial management vendor that must be used in each operation for security reasons |
| ProgramType | string | 1 | Yes | I – Individual S – SHOP |
| CarrierProgramID | string | | Yes | The carrier ID assigned by the Program |
| CarrierName | string | 50 | Yes | |
| Phone | string | 10 | | Numeric only |
| Fax | string | 10 | | Numeric only |
| Address1 | string | 50 | | |
| Address2 | string | 50 | | |
| City | string | 50 | | |
| StateOrProvince | string | 50 | | |
| PostalCode | string | 35 | | |
| RemittanceContact | Contact | | Required only when a carrier is added. | |

| | | | | |
|---------|-------------------------------|-----|--|---------------|
| ACHInfo | ACHSetting | | Required only when a carrier is added. | |
| Plans | CarrierPlan[] | 100 | | |
| EIN | string | 20 | | Tax ID Number |
| | | | | |

5.1.2 Add Carrier Plan

This operation adds the Plans the Carrier offers to the Program.

| Parameters | Data Type | Max Size | Required | Notes / Valid Values |
|---------------------------|-----------|----------|--|--|
| CustomerID | integer | | Yes | An ID provided by The financial management vendor that must be used in each operation for security reasons |
| CarrierProgramID | string | | Yes | The carrier ID assigned by the Program |
| PlanProgramID | string | 100 | Situational. Required if CarrierPlanIdentification is not provided | The ID assigned by the Program to this plan. In some cases this is the SERFF ID. |
| CarrierPlanName | string | 50 | Yes | |
| CarrierPlanIdentification | string | 50 | Situational. Required if PlanProgramID is not provided | How the Carrier identifies this plan. This is used in 834 files. |
| InsuranceType | string | 35 | Yes | Is defined by Engagement/Customer. Examples are AD&D MEDICAL DENTAL LIFE Full list 5.1.2.1 |
| CarrierPlanStartDate | string | | Yes | Date for when the Carrier plan starts. Example of valid dates: "05/01/2008" "Thu May 01, 2008" "05-01-2008" |
| CarrierPlanEndDate | string | | Yes | Date for when the Carrier plan end. Example of valid dates: "05/01/2008" "Thu May 01, 2008" "05-01-2008" |
| PlanSourceType | string | | Yes | A value to indicate the source type of the plan. Valid values are: COMMERCIAL PROGRAM (DEFAULT) MEDICAID |

5.2 Subscriber API

The following methods are available for use via the Member API exposed in the the financial management vendor Public Services.

5.2.1 Add Member Unit

This operation allows for the creation of a primary Member, plans and dependents

| Parameters | Data Type | Max Size | Required | Notes / Valid Values |
|------------------------|-----------------------------|----------|--|---|
| CustomerID | int | | Yes | An ID provided by The financial management vendor that must be used in each operation for security reasons |
| ProgramType | string | | Yes | I – Individual S – Shop |
| PrimaryMemberProgramID | string | | Yes | ID assigned to the individual by the Program. When creating the unit, this person must be included in the Individuals collection. |
| BillingStartDate | date | | Yes | This is the first day of the first billing period that the Member in on the The financial management vendor system. |
| BillingEndDate | date | | | This is the last day of the last billing period that the Member is on the The financial management vendor system. |
| LanguageCode | string | 2 | | Required if the primary language of the primary Member is not English. |
| BillingPreference | string | 35 | | This controls how the primary Member receives billing information. EMAIL NoBILL NoTICE (default) |
| PaymentPreference | string | 35 | | ONLINE PHONE RECURACH RECURCARD UNDEFINED (default) USPO |
| PaymentTransactionID | string | 100 | | For use with FFM transactions. |
| ACHInfo | ACHSetting | | Required if PaymentPreference is RECURACH | ACH information for recurring ACH payment preference. |
| CardInfo | CardSetting | | Required if PaymentPreference is RECURCARD | Bank card information for recurring card payment preference. |

| | | | | |
|-------------|------------------------------|--|--|--|
| Individuals | Person[] | | | Individuals associated with the MemberUnit. People must be included in this collection in order to be assigned to plans. |
| Plans | MemberPlan[] | | | Plans associated with the MemberUnit. |
| BrokerInfo | BrokerInfo | | | BrokerName and BrokerEIN |

6 Shared

6.1.1 Data Contracts

Data contracts listed here are shared between multiple services.

6.1.1.1 ACHSetting

| Field | Data Type | Max Size | Required | Notes / Valid Values |
|-------------------|-----------|----------|----------|---|
| CustomerID | integer | | Yes | An ID provided by The financial management vendor that must be used in each operation for security reasons |
| ProgramType | string | 1 | Yes | I – Individual S – Shop |
| ParentEntityType | string | | Yes | CARR - Carrier PSUB – Primary Member SPON - Sponsor |
| ProgramID | string | | Yes | If ParentEntityType is PSUB then ProgramID is the person ID assigned by the Program to the primary Member. If ParentEntityType is SPON then ProgramID is the ID assigned by the Program to the employer/sponsor. |
| StartDate | date | | | This is the date that ACH transactions should begin. |
| BankName | string | 23 | Yes | The name of the Carrier's bank |
| BankRoutingNumber | string | 9 | Yes | The ABA routing number of the Carrier's bank. This is required in an ACH transaction. |
| AccountName | string | 22 | Yes | The name on the Carrier's account where the remittance will be credited. |

| Field | Data Type | Max Size | Required | Notes / Valid Values |
|---------------|-----------|----------|----------|--|
| AccountNumber | string | 17 | Yes | The bank account number where the remittance will be credited. |
| AccountType | string | 8 | Yes | The type of bank account the remittance will be credited into. This is required for an ACH transaction. CHECKING SAVINGS |
| FirstName | string | 150 | No | Bank account holder's first name. |
| LastName | string | 150 | No | Bank account holder's last name. |

6.1.1.2 BrokerInfo

| Field | Data Type | Max Size | Required | Notes / Valid Values |
|------------|-----------|----------|----------|----------------------|
| BrokerName | string | 50 | Yes | Name of the Broker |
| BrokerEIN | date | 20 | Yes | Broker EIN value. |

6.1.1.3 CardSetting

| Field | Data Type | Max Size | Required | Notes / Valid Values |
|------------------|-----------|----------|----------|--|
| CustomerID | integer | | Yes | The database ID provided by The financial management vendor that the operation will be performed against. |
| ProgramType | string | 1 | Yes | I – Individual S – Shop |
| ParentEntityType | string | | Yes | PSUB – Primary Member SPON - Sponsor |
| ProgramID | string | | Yes | If ParentEntityType is PSUB then ProgramID is the person ID assigned by the Program to the primary Member. |

| | | | | |
|------------------------|---------|----|-----|--|
| | | | | If ParentEntityType is SPON then ProgramID is the ID assigned by the Program to the employer/sponsor. |
| StartDate | date | | | This is the date that card transactions should begin. |
| IsPrimary | boolean | | Yes | Set to true to indicate this credit card will be the card to use for a recurring payment. One credit card must be set to be primary. |
| RecurringCardSettingID | integer | | | Reserved for future use. |
| CardNetwork | string | | Yes | VISA MASTERCARD |
| CardNumber | string | 16 | Yes | |
| CVV2CVC2 | string | 5 | Yes | |
| ExpirationDateMonth | integer | | Yes | |
| ExpirationDateYear | integer | | Yes | |
| BillingName | string | 50 | Yes | |
| BillingStreet | string | 50 | Yes | |
| BillingCity | string | 50 | Yes | |
| BillingState | string | 2 | Yes | |
| BillingZip | string | 9 | Yes | |

6.1.1.4 CarrierPlan

| Field | Data Type | Max Size | Required | Notes / Valid Values |
|------------------|-----------|----------|----------|--|
| CustomerID | int | | Yes | An ID provided by The financial management vendor that must be used in each operation for security reasons |
| CarrierProgramID | string | | Yes | The carrier ID assigned by the Program |

| Field | Data Type | Max Size | Required | Notes / Valid Values |
|---------------------------|-----------|----------|--|--|
| PlanProgramID | string | 100 | Situational. Required if CarrierPlanIdentification is not provided | The ID assigned by the Program to this plan. In some cases this is the SERFF ID. |
| CarrierPlanName | string | 50 | Yes | |
| CarrierPlanIdentification | string | 50 | Situational. Required if PlanProgramID is not provided | How the Carrier identifies this plan. This is used in 834 files. |
| InsuranceType | string | 35 | Yes | Is defined by Engagement/Customer. Examples are AD&D MEDICAL DENTAL LIFE Full list 5.1.2.1 |
| CarrierPlanStartDate | string | | Yes | Date for when the Carrier plan starts. Example of valid dates: "05/01/2008" "Thu May 01, 2008" "05-01-2008" |
| CarrierPlanEndDate | string | | No | Date for when the Carrier plan ends. Example of valid dates: "05/01/2008" "Thu May 01, 2008" "05-01-2008" |
| PlanSourceType | string | | Yes | A value to indicate the source type of the plan. Valid values are: COMMERCIAL PROGRAM (DEFAULT) MEDICAID |

6.1.1.5 Contact

| Field | Data Type | Max Size | Required | Notes / Valid Values |
|------------|-----------|----------|----------|---|
| CustomerID | integer | | Yes | An ID provided by The financial management vendor |

| Field | Data Type | Max Size | Required | Notes / Valid Values |
|------------------|-----------|----------|----------|---|
| | | | | that must be used in each operation for security reasons |
| ProgramType | string | 1 | Yes | I – Individual S – Shop |
| ParentEntityType | string | | Yes | CARR – Carrier SPON – Sponsor |
| ProgramID | string | | Yes | If ParentEntityType is CARR then ProgramID is the ID assigned by the Program to the carrier. If ParentEntityType is SPON then ProgramID is the ID assigned by the Program to the employer/sponsor. |
| Salutation | string | 10 | | MR MRS MS MISS DR |
| FirstName | string | 50 | | |
| MiddleInitial | string | 1 | | |
| LastName | string | 50 | Yes | |
| Email | string | 100 | | |
| Title | string | 50 | | |
| Department | string | 50 | | |
| Phone | string | 10 | | Numeric only |
| Extension | string | 50 | | Numeric only |
| Phone2 | string | 10 | | Numeric only |
| Extension2 | string | 50 | | Numeric only |
| Fax | string | 10 | | Numeric only |
| Address1 | string | 50 | | |

| Field | Data Type | Max Size | Required | Notes / Valid Values |
|-----------------|-----------|----------|----------|--|
| Address2 | string | 50 | | |
| City | string | 50 | | |
| StateOrProvince | string | 50 | | Free format – no validation is performed |
| PostalCode | string | 35 | | Free format – no validation is performed |
| Country | string | 50 | | |
| LanguageCode | string | 2 | | en,es,ru,fr |

6.1.1.6 DependentPlan

| Field | Data Type | Max Size | Required | Notes / Valid Values |
|---------------------------|-------------------------------------|----------|--|---|
| CarrierPlanIdentification | xsd:string | 50 | Situational. Required if PlanProgramID is not provided | How the Carrier identifies this plan. This is also used in 834 files. |
| CarrierProgramID | xsd:string | | Situational. Required if CarrierPlanIdentification is provided | The ID assigned to the carrier by the Program |
| PlanProgramID | xsd:string | | Situational. Required if CarrierPlanIdentification is not provided | The ID assigned to the plan by the Program. |
| DependentProgramID | xsd:string | | Yes | The ID assigned by the Program to the individual dependent |
| EndDate | xsd:date | | Yes | |
| ProgramPolicyNumber | xsd:string | | No | |
| Categories | ReportingCategory[] | | No | |

6.1.1.7 DirectPayment

| Field | Data Type | Max Size | Required | Notes / Valid Values |
|---------------------------|-----------|----------|--|--|
| CustomerID | integer | | Yes | An ID provided by The financial management vendor that must be used in each operation for security reasons |
| ProgramType | string | | Yes | I – Individual S – Shop |
| PrimaryMemberProgramID | string | | Yes | ID assigned by the Program to the person who is the primary Member |
| CarrierPlanIdentification | string | 50 | Situational, required only when PlanProgramID is not supplied | How the Carrier identifies this plan. This is also used in 834 files. |
| CarrierProgramID | string | | Situational. Required if CarrierPlanIdentifi- cation is provided | The ID assigned to the carrier by the Program |
| PlanProgramID | string | | Situational. Required if CarrierPlanIdentifi- cation is not provided | The ID assigned to the plan by the Program. |
| Amount | decimal | | Yes | Amount of the payment |
| PaymentNumber | string | | Yes | Payment reference such as the check number |
| PostmarkDate | date | | Yes | The date the payment arrived at the carrier |
| DepositDate | date | | No | The date the payment was deposited. |
| PaymentMethod | string | | No | CASH CHECK MONEYORDER NONCASHNONREMITTED (default) |

| Field | Data Type | Max Size | Required | Notes / Valid Values |
|-------------|-----------|----------|----------|---|
| BenefitYear | string | 4 | No | Used to capture intent for the benefit year of the payment. |

6.1.1.8 InsuredCoverage

| Field | Data Type | Max Size | Required | Notes / Valid Values |
|---------------------|-----------|----------|---------------------------|---|
| InsuredType | string | | Yes | S – Member D – Dependent R – ResponsibleParty |
| ProgramRole | string | 3 | Yes if InsuredType = R | 6Y - Case Manager 9K - Key Person E1 - Person or other entity legally responsible for a child EL - Executor of estate EXS - Ex-spouse GB - Other insured GD - Guardian J6 - Power of Attorney LR - Legal representative QD - Responsible party S1 - Parent TZ - Significant other X4 - Spouse |
| IndividualProgramID | string | | Yes | ID assigned to the person by the Program. Required for Member and Dependent optional for ResponsibleParty. |
| IndividualCarrierID | string | | | ID assigned to the person by the carrier (this is entered on insert and will not be changed on subsequent operations). |
| CoverageStartDate | date | | Yes | First Day of Coverage |
| PlanStartDate | date | | Yes | Start date for plan |
| PlanEndDate | date | | | End date for plan |

| Field | Data Type | Max Size | Required | Notes / Valid Values |
|------------|-------------------------------------|----------|----------|--|
| Categories | ReportingCategory[] | | | Reporting categories are used to set Premium amount, APTC and CSR for an individuals plan. |

6.1.1.9 Member

| Field | Data Type | Max Size | Required | Notes / Valid Values |
|---------------------|-----------|----------|-------------------------|---|
| IndividualProgramID | string | | Yes | ID assigned to the person by the Program. |
| SSN | string | 11 | | Social Security Number. Default: 999999999 |
| Relationship | string | 35 | Yes | SPOUSE CHILD DOMESTICPARTNER PRIMARY RESPONSIBLEPARTY |
| Salutation | string | 10 | | MR MRS MS MISS DR |
| FirstName | string | 50 | Yes | |
| MiddleInitial | string | 1 | | |
| LastName | string | 50 | Yes | |
| Email | string | 100 | | |
| Phone | string | 50 | | Numeric only. |
| Phone2 | string | 50 | | Numeric only. |
| Address1 | string | 50 | Yes for Primary Member. | |
| Address2 | string | 50 | | |

| Field | Data Type | Max Size | Required | Notes / Valid Values |
|-----------------|-----------|----------|-------------------------|--|
| City | string | 50 | Yes for Primary Member. | |
| StateOrProvince | string | 50 | Yes for Primary Member | |
| PostalCode | string | 35 | Yes for Primary Member. | |
| Country | string | 50 | | Leave empty if the Dependent resides in the USA. |
| Gender | string | 35 | Yes | MALE FEMALE |
| DOB | date | | | Date of Birt[] |
| RaceCode | string | 1 | | DMG05-1 Race Code values 7 - Not Provided 8 - Not Applicable A - Asian or Pacific Islander B - Black C - Caucasian D - Subcontinent Asian American E - Other F - Asian Pacific American G - Native American H - Hispanic I - American Indian / Alaska Native J - Native Hawaiian N - Black (Non-Hispanic) O - White (Non-Hispanic) P - Pacific Islander Z - Mutually Defined |
| TobaccoUse | string | 35 | | YES NO UNKNOWN |

6.1.1.10 Person

| Field | Data Type | Max Size | Required | Notes / Valid Values |
|---------------------|-----------|----------|------------------------|--|
| CustomerID | int | | Yes | An ID provided by The financial management vendor that must be used in each operation for security reasons |
| ProgramType | string | | Yes | I – Individual S – Shop |
| IndividualProgramID | string | | Situational | ID assigned to the person by the Program. Required for SPOUSE, CHILD, DOMESTICPARTNER, PRIMARY optional for RESPONSIBLEPARTY. |
| SSN | string | 11 | | Social Security Number Default: 9999999999 |
| Relationship | string | 35 | Yes | SPOUSE CHILD DOMESTICPARTNER PRIMARY RESPONSIBLEPARTY |
| Salutation | string | 10 | | MR MRS MS MISS DR |
| FirstName | string | 50 | Yes | |
| MiddleInitial | string | 1 | | |
| LastName | string | 50 | Yes | |
| Email | string | 100 | | |
| Phone | string | 50 | | Numeric only |
| Phone2 | string | 50 | | Numeric only |
| Address1 | string | 50 | Yes for Primary Member | |

| Field | Data Type | Max Size | Required | Notes / Valid Values |
|-----------------|-----------|----------|------------------------|--|
| Address2 | string | 50 | | |
| City | string | 50 | Yes for Primary Member | |
| StateOrProvince | string | 50 | Yes for Primary Member | |
| PostalCode | string | 35 | Yes for Primary Member | |
| Country | string | 50 | | Leave empty if the Dependent resides in the USA |
| Gender | string | 35 | Yes | MALE FEMALE |
| DOB | date | | | Date of Birth |
| RaceCode | string | 1 | | DMG05-1 Race Code values 7 - Not Provided 8 - Not Applicable A - Asian or Pacific Islander B - Black C - Caucasian D - Subcontinent Asian American E - Other F - Asian Pacific American G - Native American H - Hispanic I - American Indian / Alaska Native J - Native Hawaiian N - Black (Non-Hispanic) O - White (Non-Hispanic) P - Pacific Islander Z - Mutually Defined |
| TobaccoUse | string | 35 | | YES NO UNKNOWN |

6.1.1.11 ReportingCategory

| Field | Data Type | Max Size | Required | Notes / Valid Values |
|----------------|-----------|----------|----------|---|
| CategoryName | string | | Yes | ADDL MAINT REASON AID CAT CODE APPLICATION ID AND ORIGIN APTC AMT CAC ID CARRIER TO BILL CHP DISENROLL RSN CHP FAM SIZE CHP STATUS CHP WAIT PERIOD CITIZENSHIP STATUS COE CODE COPAY EXEMPT IND CSR AMT EMP COV LOST DATE EXCEPTION FISCAL COUNTY MED DISENROLL RSN MONEY CODE OTH PAY AMT 1 PRE AMT 1 PRE AMT TOT PREG EXP DUE DATE PREG IND RATING AREA REQUEST SUBMIT TIMESTAMP RRE CODES SEP REASON SOURCE PROGRAM ID SPONSOR PROGRAM ID ST CSR AMT ST SUB AMT TOT EMP RES AMT TOT RES AMT TPL CVRG The PRE AMT TOT value is required in all call to the API. All other valid values may accompany this category. |
| ReferenceValue | string | | Yes | This will include string representations of dollar amounts in which case no punctuation other |

| Field | Data Type | Max Size | Required | Notes / Valid Values |
|--------------------|-----------|----------|----------|--|
| | | | | than a single decimal point (.) will be allowed. The actual data type will be inferred by CategoryName. |
| EffectiveStartDate | date | | Yes | |
| EffectiveEndDate | date | | | |

6.1.1.12 MemberPlan

| Field | Data Type | Max Size | Required | Notes / Valid Values |
|---------------------------|-----------|----------|--|--|
| CustomerID | int | | Yes | An ID provided by The financial management vendor that must be used in each operation for security reasons |
| ProgramType | string | | Yes | I – Individual S – Shop |
| CarrierPlanIdentification | string | 50 | Situational. Required if PlanProgramID is not provided | How the Carrier identifies this plan. This is also used in 834 files. |
| CarrierProgramID | string | | Situational. Required if CarrierPlanIdentification is provided | The ID assigned to the carrier by the Program |
| PlanProgramID | string | | Situational. Required if CarrierPlanIdentification is not provided | The ID assigned to the plan by the Program. |
| CoverageLevel | string | 35 | Yes | CHD DEP E1D E2D E3D E3D ECH EMP ESP FAM |

| Field | Data Type | Max Size | Required | Notes / Valid Values |
|---------------------|-----------------------------------|----------|-------------|---|
| | | | | IND SPC SPO TWO |
| ChangeEffectiveDate | date | | Situational | Only required when updating an existing plan |
| Insureds | InsuredCoverage[] | | Yes | Primary Member or Responsible Party Required |
| ProgramPolicyNumber | string | | No | PolicyNumber assigned by the Program. |
| EDIReasonCode | string | 3 | No | INS04 Maintenance reason codes defined in 5010 Implementation guide |
| BenefitYear | string | 4 | Situational | Required on AddMemberUnitSync UpdateMemberPlan will use Benefit year sent on the Add (not used for UpdateMemberPlan) |
| EnrollmentType | string | 10 | Situational | Required on AddMemberUnitSync service call. RENEWAL (renewal of the same product during open enrollment), NEWPRODUCT (new enrollment or new product selection during open enrollment) Do not send on UpdateMemberPlan. |
| Units | string | 9 | Optional | Number of Units for this plan |

6.1.1.13 MemberUnit

| Field | Data Type | Max Size | Required | Notes / Valid Values |
|-------------|-----------|----------|----------|--|
| CustomerID | int | | Yes | An ID provided by The financial management vendor that must be used in each operation for security reasons |
| ProgramType | string | | Yes | I – Individual S – Shop |

| Field | Data Type | Max Size | Required | Notes / Valid Values |
|------------------------|-----------|----------|-------------|--|
| SponsorProgramID | string | | Situational | If the primary Member is an employee in the SHOP Program / Group then include the ID assigned to the employer by the Program |
| SponsorDivisionName | string | 50 | Situational | This field is ignored if the ProgramType is Individual. Required only if Employer Divisions are being used. If this is blank, the default Employer division will be used. |
| PrimaryMemberProgramID | string | | Yes | ID assigned to the individual by the Program. When creating the unit, this person must be included in the Individuals collection. |
| BillingStartDate | date | | Yes | This is the first day of the first billing period that the Member is on the The financial management vendor system. Default -2013-10-01 |
| BillingEndDate | date | | | This is the last day of the last billing period that the Member is on the The financial management vendor system. |
| LanguageCode | string | 2 | | Required if the primary language of the primary Member is not English. ISO 639-1 is used for the language code. Not applicable for Groups. |
| BillingPreference | string | 35 | | This controls how the primary Member receives billing information. EMAIL NoBILL NoTICE (default) |
| PaymentPreference | string | 35 | | ONLINE PHONE RECURACH RECURCARD UNDEFINED (default) USPO |

| Field | Data Type | Max Size | Required | Notes / Valid Values |
|----------------------|------------------------------|----------|--|--|
| PaymentTransactionID | string | 100 | | For use with FFM transactions. |
| ACHInfo | ACHSetting | | Required if PaymentPreference is RECURACH | ACH information for recurring ACH payment preference. |
| CardInfo | CardSetting | | Required if PaymentPreference is RECURCARD | Bank card information for recurring card payment preference. |
| Individuals | Person[] | | | Individuals associated with the MemberUnit. People must be included in this collection in order to be assigned to plans. |
| Plans | MemberPlan[] | | | Plans associated with the MemberUnit. |
| BrokerInfo | BrokerInfo | | | BrokerName and BrokerEIN |

6.1.2 References

6.1.2.1 Insurance Types

| Value | Description |
|----------------------|------------------------------------|
| 401k | 401k |
| ACCIDENTNoNUNITBASED | Accident - Non Unit Based |
| ACCIDENTUNITBASED | Accident - Unit Based |
| AD&D | Accidental Death and Dismemberment |
| CANCER | Cancer |
| CHIROPRACTIC | Chiropractic |
| CRITICALILLNESS | Critical Illness |

| Value | Description |
|-----------------|------------------------------------|
| CUSTOMBILLING | Custom Billing |
| DENTAL | Dental |
| DEPLIFE1 | Dependent Life 1 (units based) |
| DEPLIFE2 | Dependent Life 2 (units based) |
| DEPLIFE3 | Dependent Life 3 (units based) |
| EAP | Employee Assistance Program |
| FSA | Flexible Spending Account |
| GAP | Gap |
| GRPLIFE | Group Life (units based) |
| HCRA | Healthcare Reimbursement Account |
| HSA | Health Savings Account |
| LIFE | Life Insurance (units based) |
| LTD | Long Term Disability |
| LTDNoNUNITBASED | LTD - Non Unit Based |
| LTDUNITBASED | LTD - Unit Based |
| MEDICAID | Medicaid |
| MEDICAL | Medical |
| MEDSTURIDER1 | Medical Student Rider 1 |
| MEDSTURIDER2 | Medical Student Rider 2 |
| MEDSTURIDER3 | Medical Student Rider 3 |
| MERP | Medical Expense Reimbursement Plan |
| MSA | Medical Savings Account |

| Value | Description |
|-----------------|------------------------------------|
| NUDEPLIFE1 | Dependent Life 1 (non-units based) |
| NUDEPLIFE2 | Dependent Life 2 (non-units based) |
| NUDEPLIFE3 | Dependent Life 3 (non-units based) |
| NUGRPLIFE | Group Life (non-units based) |
| NULIFE | Life Insurance (non-units based) |
| NUOTHER1 | Other Non-Units Based |
| NUOTHER2 | Other Non-Units Based 2 |
| NUVOLLIFE | Voluntary Life (non-units based) |
| PBA | Pharmacy Benefit Allowance |
| PET | Pet Insurance |
| PHARMACY | Pharmacy |
| STDNoNUNITBASED | STD - Non Unit Based |
| STDUNITBASED | STD - Unit Based |
| UOTHER1 | Other Units Based 1 |
| UOTHER2 | Other Units Based 2 |
| UOTHER3 | Other Units Based 3 |
| VEBA | VEBA |
| VISION | Vision |
| VOLLIFE | Voluntary Life (units based) |
| VOLUNTARYOTHER | Voluntary - Other |
| VPHARM | Vermont Pharmacy |

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