



2025 Qualified Health Plan Enrollee Experience Survey (QHP Enrollee Survey)

Vendor Training

September 2024



Agenda

Topic	Time (ET)
Welcome and Training Introduction	1:00–1:10 p.m.
Program Overview	1:10–1:25 p.m.
Eligibility and Sampling	1:25–1:50 p.m.
Data Collection Protocol	1:50–2:30 p.m.
Break	2:30–2:45 p.m.
Data Coding, File Specifications, and Data Submission	2:45–3:10 p.m.
Data Analysis and Public Reporting	3:10–3:25 p.m.
Quality Oversight	3:25–3:45 p.m.
Wrap-Up and Next Steps	3:45–4:00 p.m.



Welcome and Training Introduction

Welcome and Training Introduction

- Welcome to the 2025 QHP Enrollee Survey vendor training
- Today's training focuses on:
 - New/revised guidance from the QHP Enrollee Survey: Technical Specifications for 2025 (2025 Technical Specifications)
 - Key highlights from the 2025 Technical Specifications
 - Changes to survey instruments and protocols
 - Quality control and oversight
- Vendors are responsible for reviewing the *QHP Enrollee Survey: Technical Specifications for 2025* (2025 Technical Specifications) and all survey materials posted on the [Health Insurance Marketplace Quality Initiatives \(MQI\) website](#)

Special Bullets

★ = New/Revised Guidance from the 2025 Technical Specifications

! = Key Highlights from the 2025 Technical Specifications

Note. References to appendices (e.g., Appendix D), exhibits (e.g., Exhibit 18), sections (e.g., Section 9) and tables (e.g., Table E-2) refer to the 2025 Technical Specifications

Program Overview



Overview

- Introduction to the QHP Enrollee Survey
- QHP Enrollee Survey goals
- About the survey instrument
- Roles and responsibilities
- QHP Enrollee Survey website
- QHP Enrollee Survey timeline
- Key changes for 2025
- Technical assistance

Introduction to the QHP Enrollee Survey

- Established by Section 1311(c)(4) of the Patient Protection and Affordable Care Act
- Assesses enrollee experience and satisfaction with each QHP offered through the Health Insurance Exchanges (Exchanges)
- Supplies data to the Quality Rating System (QRS)
- Collects data for production of Quality Improvement (QI) reports
- QHP issuers are required to submit QHP Enrollee Survey response data and QRS clinical measure data as a condition of certification and participation in the Exchanges

QHP Enrollee Survey Goals

- Provide comparable and useful information to consumers about the quality of health care services and enrollee experience with QHPs offered through the Exchanges
- Facilitate oversight of QHP issuer compliance with quality reporting standards set forth in the Patient Protection and Affordable Care Act
- Provide actionable information that QHP issuers can use to improve quality and performance

About the Survey Instrument

- 67 questions, including Consumer Assessment of Healthcare Providers and systems (CAHPS®) questions and questions specifically designed for the QHP enrollee population
 - Supplemental questions not permitted

QHP Enrollee Survey Topics	
Access to Care*	Doctor Communication
Access to Information*	Enrollee Experience with Cost
Care Coordination*	Plan Administration*
Cultural Competence	Prevention*

*Survey questions within this topic are included in the QRS measure set.

Note. CAHPS®, Consumer Assessment of Healthcare Providers and Systems, is a registered trademark of the Agency for Healthcare Research and Quality.

Roles and Responsibilities: Project Team

- Under guidance from CMS, the Project Team:
 - Provides vendors with standardized survey fielding protocols, the associated timeline and materials, a description of data submission methods for the QHP Enrollee Survey through distribution of the 2025 Technical Specifications
 - Trains vendors to administer the QHP Enrollee Survey annually
 - Conducts oversight of vendor processes and procedures prior to and during survey fielding
 - Provides technical assistance via email to vendors and QHP issuers
 - Supplies vendors with the tools, format, and procedures for submitting collected data
 - Processes, reviews, and analyzes data files submitted by vendors
 - Provides summary-level QHP Enrollee Survey results to QHP issuers and Exchanges

Roles and Responsibilities: QHP Issuers

- Attend 2025 QRS and QHP Enrollee Survey webinars on the Registration for Technical Assistance Portal (REGTAP)
- Contract with:
 - Department of Health and Human Services (HHS)-approved vendor to conduct survey
 - National Committee for Quality Assurance (NCQA) Healthcare Effectiveness Data and Information Set (HEDIS®) Compliance Auditor to validate sample frame
- Generate sample frame for each reporting unit (on or after January 7, 2025)
 - HEDIS® Compliance Auditor completes validation of the QHP Enrollee Survey sample frame by January 31, 2025
- Complete the following via the [QHP Enrollee Survey website](#) no later than January 31, 2025:
 - Attest the reporting unit eligibility or ineligibility for QRS and QHP Enrollee Survey data submission
 - If eligible, communicate authorized survey vendor to CMS
 - ★ If eligible, confirm QHP Enrollee Survey sample frame validation via the QHP Enrollee Survey website
- Provide validated sample frame to vendor

Roles and Responsibilities: Vendors

- Adhere to participation rules and program requirements
- Administer survey per the 2025 Technical Specifications
- Oversee work of staff and subcontractors
- Conduct all business operations at official location within the continental U.S., Hawaii, Alaska, or U.S. Territories
 - ! Remote operations **not** permitted without prior approval from CMS
- Maintain and establish security procedures as required by the Health Insurance Portability and Accountability Act (HIPAA)

Roles and Responsibilities: Vendors (cont'd)

- Contract with issuers and verify issuer clients have authorized vendor to submit data to CMS on their behalf
- ! Receive validated sample frame and perform quality assurance (QA) checks
- Draw sample according to specifications
- ! Notify CMS of issuers that do not provide a validated sample frame by January 31, 2025
- Submit files in accordance with specifications via the [QHP Enrollee Survey website](#)
- Meet all project deadlines and reporting requirements
- After a minimum of three years, securely destroy QHP data files, including paper or scanned questionnaires and electronic data files

QHP Enrollee Survey Website

- Registration is required to gain access to the [QHP Enrollee Survey website](#)
- To register, new users must:
 - ★ Complete remote identity proofing (RIDP) to register an account in CMS's Identity Management (IDM) System and gain access to the QHP enrollee survey website as vendor or issuer (as applicable)
 - ★ Provide required information (i.e., full legal name, social security number, date of birth, current residential address, and personal phone number)
 - » CMS uses information provided for the purpose of identity verification via the Experian identity verification system **only**
 - » Information is kept private and not shared with any federal or private agency
 - » Must set up multi-factor authentication for login
- Vendor and issuer website user guides are available on the [MQI website](#)

QHP Enrollee Survey Website (cont'd)

- **Issuer Processes**

- Attest to reporting unit eligibility/ineligibility
- Report HHS-approved survey vendor to CMS
- 2025 Operational Instructions (to be posted on the [MQI website](#) in Fall 2024) will include detailed steps to submit reporting unit eligibility status and survey vendor selection

- **Vendor Processes**

- Test and final data submission

2025 QHP Enrollee Survey Timeline

Task	Date
Conditionally approved vendors contract with QHP issuers	September–December 2024
2025 QHP Enrollee Survey Vendor Training	September 26, 2024
Vendors notified of final approval status	October 3, 2024
CMS conducts remote data record review for returning vendors	December 2024
<p>Survey Materials: Vendors submit:</p> <ul style="list-style-type: none"> • Mail: Survey instruments and letters • Internet: Internet survey, emails, and required credentials • Telephone: Screenshots of computer-assisted telephone interviewing (CATI) system 	<p>Deadline Mail: October 11, 2024 Deadline Internet: November 1, 2024 Deadline Telephone: November 15, 2024</p>

2025 QHP Enrollee Survey Timeline (cont'd)

Task	Date
Report #1: Vendors submit Quality Assurance Plan	Deadline: October 18, 2024
Report #2: Vendors submit preliminary QHP client list and oversampling requests	Deadline: January 8, 2025
<ul style="list-style-type: none">• QHP issuers attest to QRS and QHP Enrollee Survey eligibility status, authorize a vendor, and confirm sample frame validation• Vendors obtain authorization from QHP issuer clients to conduct surveys on their behalf	Deadline: January 31, 2025

QHP issuer contracts with a HEDIS^{®a} Compliance Organization (NCQA-licensed) for validation of the QHP Enrollee Survey sample frame and the QRS clinical measure data by October 1, 2024.

2025 QHP Enrollee Survey Timeline (cont'd)

Task	Date
<ul style="list-style-type: none"> Vendors receive validated sample frames from QHP issuer clients and obtain confirmation that a HEDIS[®] Compliance Auditor validated the sample frame Vendors notify CMS of QHP issuer clients that have not provided validated sample frame by the deadline 	<p>Deadline: January 31, 2025</p>
<ul style="list-style-type: none"> QHP issuer completes NCQA's Healthcare Organization Questionnaire (HOQ) for the HEDIS[®] Compliance Auditor to document and prepare for QRS clinical measure data submission 	<p>Deadline: February 2025</p>
<ul style="list-style-type: none"> QHP issuers and HEDIS[®] Compliance Auditor complete the HEDIS[®] Compliance Audit[™] 	<p>January–June 2025</p>

2025 QHP Enrollee Survey Timeline (cont'd)

Task	Date
Vendors administer QHP Enrollee Survey per sampling and fielding protocols	February–May 2025
Report #3: Vendors submit final QHP issuer client list	Deadline: February 7, 2025
Vendors participate in QHP Enrollee Survey Data Submission Training	February 27, 2025
Report #4: Vendors submit Interim Progress Report	Deadline: April 4, 2025

2025 QHP Enrollee Survey Timeline (cont'd)

Task	Date
Test data submission	April 9–11, 2025
Data submission <i>Files due by 11:59 p.m. ET on May 16, 2025</i>	May 9–16, 2025
Data resubmission (if requested) <i>Must submit within three business days of date requested</i>	Deadline: May 19–21, 2025
Report #5: Vendors submit Final Report	Deadline: May 23, 2025

Key Updates for 2025

★ 2025 Technical Specifications

- Updated dates throughout
- Specified that vendors may not revise materials after they are accepted by CMS.
- Specified that vendors must accept and process data for all internet surveys received through the end of the protocol
- Removed FAQs for Customer Support Staff and Interviewers from the Appendix and added references to the English, Spanish, and Chinese FAQs on the MQI website

★ 2025 Survey Materials

- Added the Chinese internet survey mode, including the internet survey and notification/reminder emails
- Revised the prenotification and reminder letters to require use of QR codes

Technical Assistance Resources

- [CMS Marketplace Quality Initiatives \(MQI\) website](#)
 - General information, news, and updates
 - 2025 Technical Specifications and survey materials
 - Exception Request template
 - Discrepancy Report template
 - *QRS and QHP Enrollee Survey: 2025 Technical Guidance*
- Technical Assistance for Vendors
 - Email: QHP_Survey@air.org
- Technical Assistance for Issuers
 - Email: CMS_FEPS@cms.hhs.gov (include *QHP Enrollee Survey* in subject)
 - Phone: 1-855-CMS-1515 (1-855-267-1515)

Program Overview Questions?

Eligibility and Sampling



Eligibility and Sampling Overview

- Reporting unit definition and eligibility guidelines
- Reporting eligibility status to CMS
- Sample frame generation, validation, and layout
- Sampling protocol
- Sample frame quality assurance (QA) checks
- Fielding additional surveys using the QHP Enrollee Survey sample frame

Note. See Section 9: Determine QHP Issuer Eligibility and Section 10: Create Sample Frame and Draw Sample for detailed eligibility and sampling requirements.

Reporting Unit Definition

- Defined as the unique state-product type offered by a QHP issuer through the Exchange, including QHPs in both the Small Business Health Options Program (SHOP) and individual market
 - Excludes enrollees in basic health program (BHP) plans, indemnity plans (i.e., fee for service plans), stand-alone dental plans, or child-only plans
 - Product types subject to survey requirements: EPO, HMO, POS, PPO
- Identified by a Reporting Unit ID
 - Issuer ID–QHP State–Product Type
 - 12345–TX–PPO
- ! QHP issuers **must** combine SHOP and individual family plans if they are the same product type offered in the same state
- ! QHP issuers **must not** combine product types or states

Reporting Unit Eligibility Guidelines

- QHP issuers are required to collect and submit QHP data for each reporting unit that meets all below criteria:
 - Offered through an Exchange in the prior year (2024)
 - Offered through an Exchange in the ratings year (2025) as same product type
 - Included more than 500 enrollees as of July 1, 2024
 - Included more than 500 enrollees as of January 1, 2025
- ! Count includes *all enrollees* within the reporting unit (**not** just “survey eligible” enrollees) in both SHOP and individual markets
- ! **Note.** If a reporting unit is discontinued before June 15 of the ratings year *and* all enrollees are automatically transferred to a new reporting unit of the same product type, then the new reporting unit is responsible for meeting reporting requirements

Reporting Unit Eligibility Examples

Reporting Unit	Enrollment as of July 1, 2024	Enrollment as of January 1, 2025	Discontinued Prior to June 15, 2025?	Required to submit QRS and QHP Enrollee Survey Data?
12345-WV-PPO	505 (505 individual, 0 SHOP)	505 (505 individual, 0 SHOP)	No	Yes
12345-WV-HMO	601 (501 individual, 100 SHOP)	N/A	Yes – Discontinued as of December 31, 2024	No – Not operating in ratings year
12345-MD-PPO	100 (55 individual, 45 SHOP)	100 (55 individual, 45 SHOP)	No	No – Insufficient enrollment size in both years
12345-MD-HMO	700 (700 individual, 0 SHOP)	300 (300 individual, 0 SHOP)	No	No – Insufficient enrollment size as of January 1, 2025
12345-MD-EPO	505 (300 individual, 205 SHOP)	501 (300 individual, 201 SHOP)	No	Yes
12345-MD-POS	500 (300 individual, 200 SHOP)	500 (300 individual, 200 SHOP)	No	No – Insufficient enrollment in both years

Reporting Eligibility Status to CMS: QHP Issuers

- QHP issuers must report eligibility or ineligibility for each reporting unit via the [QHP Enrollee Survey website](#) by **January 31, 2025**
 - QHP issuers with **ineligible** reporting units must submit reporting unit information and ineligibility reason
 - QHP issuers with **eligible** reporting units must attest to reporting unit information and select and authorize an HHS-approved vendor
- CMS Identity Management (IDM) system and QHP Enrollee Survey website registration required
- The 2025 Operational Instructions (to be posted on the [MQI website](#) in Fall 2024) will include detailed steps on how to submit reporting unit eligibility status information to CMS via the QHP Enrollee Survey website

Sample Frame Generation: QHP Issuers

- Populate sample frame of all survey-eligible enrollees for each eligible reporting unit
 - **Do not** combine sample files for different reporting units or products into a single file
 - Enrollees must meet both continuous and current enrollment requirements
 - ! Enrollees on a “Do Not Survey” list remain eligible for sampling
 - Refer to Exhibit 12 for detailed enrollee eligibility requirements
- Adhere to sample frame file layout (Appendix E)
 - **Must** fully populate all sample frame variables
 - **Do not** append additional data fields
- ! Must generate sample frames on or after January 7, 2025
 - Include current enrollees and remove deceased enrollees as of 11:59 p.m. ET on January 6, 2025 (anchor date)
- Complete sample frame validation with HEDIS Compliance Auditor by January 31, 2025
- Provide a list of common plan name aliases to vendors

Key Updates: Sample Frame File Layout (Appendix E)

- ★ Updated years and dates throughout, as needed
- ★ Updated Exhibit E-1 (Sample Frame File Layout) to emphasize two separate values for Bronze (Not Expanded) and Bronze Expanded metal levels
- ★ Updated Exhibits E-1 (Sample Frame File Layout) and E-2 (Recommended Logic Agreement Checks for 0% Bias Variables) to indicate state names should be capitalized

Sample Frame File Layout

Exhibit E-1 details data elements that must be included in the sample frame

★ Updated to emphasize two separate values for Bronze (not expanded) and Bronze Expanded

Variable	Description	Valid Values
Metal Level	<ul style="list-style-type: none">• Metal level associated with enrollee's QHP	<ul style="list-style-type: none">• 1 = Platinum• 2 = Gold• 3 = Silver★ 4 = Bronze (Not Expanded)• 5 = Catastrophic• 6 = Bronze Expanded• 9 = Missing <p>Note: A valid value is required for every enrollee in the record.</p> <p>★ Note: There are separate valid values for Bronze and Bronze Expanded metal values.</p>

Sample Frame File Layout

- ★ The values for the following variables must be provided in capitalized letters:
 - QHP State (e.g., TX)
 - Reporting Unit ID (e.g., 12345-TX-PPO)

Sample Frame Validation

1. The **QHP issuer** generates the sample frame data file(s) per specifications
2. The **QHP issuer** delivers the sample frame data file(s) to the NCQA HEDIS Compliance Auditor (auditor)
3. The **auditor** validates the sample frame data file(s) and notifies the QHP issuer of the results. If the auditor determines that the quality or completeness of the sample frame poses a threat to the desired survey response rate, the QHP issuer corrects the sample frame until the desired audit result is achieved
4. The **QHP issuer** securely forwards the auditor-locked sample frame data file(s) and documentation of the validation results to the vendor
5. The **vendor** draws the survey sample and administers the survey per specifications

Vendor Sampling Activities

Step 1

- Vendor receives the auditor-locked sample frame data file(s) from QHP issuer via secure transmission
- Vendor unlocks sample frame data file(s) using the appropriate password according to the licensed organization that conducted the audit

Step 2

- Vendor reviews sample frame data file(s) and conducts QA checks including, but not limited to, the checks specified in Exhibit 18 and Table E-2

Step 3

- Vendor deduplicates the sample frame data file(s) according to the process included in Exhibit 15

Step 4

- Vendor determines deduplication counts as specified in Exhibit 16

Vendor Sampling Activities (cont'd)

Step 5

- Vendor draws random sample of 1,300 enrollees from deduplicated sample frame
- If there are fewer than 1,300 enrollees in a reporting unit, the vendor surveys all enrollees in the sample frame

Step 6

- Vendor conducts final QA activities on the selected survey sample

Step 7

- Vendor excludes enrollees who appear on its internal "Do Not Survey" list from receiving survey outreach materials
- *Note.* Do not replace these individuals in the survey sample; assign a final disposition code of "X43–Do Not Survey List"

Sample Frame QA Checks

- ! QHP issuers provide validated sample frames to vendors by January 31, 2025
 - Vendors notify CMS of any QHP issuer clients who do not provide a validated sample frame by January 31, 2025
- ! Vendors **must** conduct QA checks of the sample frames to verify accuracy
- QA checks verify that data from the sample frame are accurately captured to prevent sampling errors
- See Exhibit 18 for suggested sample frame QA checks for vendors

Sample Frame QA Checks (cont'd)

Example Vendor QA Checks for Sample Frame Files

- Verify that the Reporting Unit ID corresponds to the correct Issuer Legal Name
- Verify that the reporting unit's product type was the same in both 2024 and 2025
- Verify that the Reporting Unit ID is defined by the unique state-product type (EPO, HMO, POS, and PPO) for each QHP issuer
- Verify that the sample frame contains the entire eligible populations, including both the individual market and SHOP enrollees
- Review the sample frame files for missing information
- ★ Verify that State abbreviations in the QHP State and Reporting Unit ID are provided in capitalized letters
- ! Verify that enrollees are in QHPs offered through an Exchange. Exchange QHPs are designated as HIOS Variant IDs -01 through -06 and -31 through -36 for Medicaid Expansion QHP enrollees

Note. See Exhibit 18 for more examples. Exhibit 18 should not be considered an exhaustive list of QA activities.

Sample Frame QA Checks (cont'd)

- Select variables (0% bias variables) must be populated for every record in the file
 - Product Type
 - Issuer ID
 - QHP State
 - Reporting Unit ID
 - Variant ID
 - Reporting Status
 - Total Enrollment
- Must meet specific logic agreement checks for each record
- Discrepancies can indicate a potential sample error

Sample Frame QA Checks (cont'd)

Exhibit E-2 details recommended logic agreement checks for 0% bias variables

★ Added checks for QHP State and Reporting Unit ID variables for 2025

Variable	Logic Agreement Checks	Example
QHP State	<ul style="list-style-type: none">• Must match the reported 2-character QHP state postal code in the Reporting Unit ID Variable• Must not be missing• Must be identical for all records in the sample frame ★ Must be in capitalized letters	Reporting Unit ID = 12345- <u>TX</u> -PPO; then QHP State = <u>TX</u> for all records

Sample Frame QA Checks (cont'd)

Variable	Logic Agreement Checks	Example
Reporting Unit ID	<ul style="list-style-type: none"> • Must match the reported values for the Issuer ID, QHP State, and Product Type Variables • Must not be missing • Must be identical for all records in the sample frame ★ Must be in capitalized letters ★ Must be listed as it appears on the QHP Enrollee Survey website. Instructions for accessing the QHP Enrollee Survey website will be included in the <i>2025 QRS and QHP Enrollee Survey: Operational Instructions</i>, which will be available in fall 2024 	<p>Reporting Unit ID = <u>12345-TX-PPO</u>; then for all records:</p> <ul style="list-style-type: none"> • 5-digit Issuer ID = Issuer ID variable = <u>12345</u> • 2-character QHP state postal code = QHP State variable = <u>TX</u> • 3-character product type = Product Type variable = <u>PPO</u>

Sampling Definitions

Subscriber or Family Identifier (SFID)

- Covered family unit
- Primary insured person and covered dependents

Enrollee Unique Identifier (EUID)

- Specific person
- Each person in the SFID has an EUID, including the primary insured person and every dependent

Sampling Protocol

1. Sort sample frame into the following hierarchy (Exhibit 15)
 - First: Sort by SFID to group all covered family members together
 - Second: Group all EUID associated with the same SFID
2. Deduplicate sample frame
 - Deduplicate by SFID: Use simple random sampling to retain **one** eligible enrollee (i.e., EUID) per SFID
 - Deduplicate by address if:
 - SFIDs are unique for each enrollee in the covered family unit
 - Sample frame does not contain SFIDs
 - ! No deduplication by address if already deduplicated by SFIDs
3. Draw random sample of 1,300 enrollees from deduplicated sample frame
 - If oversampling, draw sample according to approved oversampling percentage
 - ! If sample frame $\leq 1,300$ enrollees, include all enrollees

Deduplication Counts

- Vendors calculate three “count” variables based on deduplication for inclusion in submitted data files
- “Count” variables used to determine selection probabilities and create survey weights

Field	Description
n_fr	Total number of enrollees in the sample frame for each reporting unit <i>before</i> deduplication <i>Note.</i> This value will be the same for all enrollees in the same reporting unit
K	Number of survey-eligible enrollees (or EUIDs) covered under each SFID; calculated by summing the number of EUIDs per SFID (or address, if applicable) <i>before</i> the deduplication step. <i>Note.</i> This value will vary by enrollee
M	Total number of records in the sample frame for reporting unit <i>after</i> deduplication. <i>Note.</i> This value will be the same for all enrollees in the same reporting unit

Oversampling

- Oversampling permitted at the reporting unit level if eligible enrollee volume is sufficient to support the increased sample size
- Must occur in 5% increments and may not exceed 30%
- QHP issuers should notify their vendor of oversampling plans as early as possible
- Vendors submit oversampling requests by **January 8, 2025** (as part of Report #2)

“Do Not Survey” List

- **Do not** exclude sampled enrollees based on a QHP Issuer’s “Do Not Survey” List, including those who have opted out of emails
- **Do** exclude sampled enrollees based on internal vendor “Do Not Survey” list
 - Assign “X43—Do Not Survey List”
 - ! Vendors encouraged to maintain QHP-specific “Do Not Survey” list
- If enrollee requests to be placed on “Do Not Survey” list after data collection begins:
 - Assign “X32—Refusal”
 - Add to internal “Do Not Survey” list
- Vendors maintain list for three years; list applies to all survey modes
- ! **Do not** remove or replace enrollees in the sample who have requested to not be contacted

Bad Addresses/Telephone Numbers and Email Preferences

- Enrollees in sample frame with known bad addresses or telephone numbers **cannot** be excluded from the survey sample
 - Known bad address: include enrollee in internet and telephone phases
 - Known bad telephone number: include enrollee in mail and internet phases
- Enrollees in sample frame who asked to be removed from QHP issuer email communications **cannot** be excluded from the final survey sample
 - Vendors still required to send the enrollee emails
 - » *Exceptions:* The enrollee asks the vendor to stop email communication or appears on the vendor's internal "Do Not Survey" list

Summary Sample Quality Control (QC) Checks

- ! Vendors **must** conduct QC checks of survey sample to verify accurate deduplication and sampling procedures
- Assess completeness of enrollee contact information (mailing address, telephone number, email address)
 - If missing contact information threatens response rates, vendors may request additional contact information from the QHP issuer
 - QHP issuers may provide additional contact information for the entire validated sample frame
 - Vendors **never** send selected survey sample or identifiable person-level information to QHP issuers or ask for updated information for a particular enrollee

Fielding Additional Surveys

- Vendors are strongly discouraged from asking sampled enrollees any QHP Enrollee Survey questions four weeks prior to and during QHP Enrollee Survey Fielding
 - December 15, 2024 – May 15, 2025
- Vendors are permitted to use the QHP Enrollee Survey sample frame to draw additional samples for other survey efforts
 - Only after the QHP Enrollee Survey sample has been drawn
 - Vendors are strongly encouraged to exclude households and SFIDs that are sampled for the 2025 QHP Enrollee Survey

Summary of Key Updates: Eligibility and Sampling

- ★ Updated years and dates throughout, as needed
- ★ Revised Exhibit 18 (Quality Control Checks for Sample Frame Files) to add a quality control check for sample frame files to verify that state abbreviations in the QHP State and Reporting Unit ID are provided in capitalized letters.
- ★ Updated Exhibit E-1 (Sample Frame File Layout) to specify state names must be capitalized in QHP State and Reporting Unit ID and differentiated values for Bronze and Bronze Expanded metal levels
- ★ Updated Exhibit E-1 (Sample Frame File Layout) and Exhibit E-2 (Recommended Logic Agreement Checks for 0% Bias Variables) to indicate state names should be capitalized

Eligibility and Sampling Questions?

Data Collection Protocol



Data Collection Protocol Overview

- Survey fielding
- Mail protocol
- Internet protocol
- Telephone protocol
- Customer support

Note. See Sections 12–16 for detailed data collection protocol requirements.

Survey Fielding



Mixed-Mode Administration

- Mail, internet, and telephone
- ★ All modes available in English, Spanish, and Chinese
- Fielding in English and Spanish required
- Fielding in Chinese optional
- Vendors prohibited from translating survey into other languages

Mail: <i>English, Spanish, and Chinese</i>	★Internet: <i>English, Spanish, and Chinese</i>	Telephone: <i>English, Spanish, and Chinese</i>
Prenotification letter	Notification email	Up to six follow-up calls to nonrespondents
Two survey packets	Two reminder emails	
Reminder letter	Web-based survey	

Survey Administration Schedule

Task	Date
• Sample enrollees per sampling protocols	Jan–Feb
• Mail prenotification letter,* activate internet survey, and open customer support telephone/email	Day 1
• Mail first survey packet to nonrespondents six calendar days after prenotification letter is mailed* • Send notification email to nonrespondents six calendar days after prenotification letter is mailed*	Day 7
• Send first reminder email to nonrespondents six calendar days after the notification email is sent*	Day 13
• Send second reminder email to nonrespondents six calendar days after the first reminder email is sent*	Day 19
• Mail reminder letter to nonrespondents 13 calendar days after the first survey is mailed*	Day 20
• Mail second survey packet to nonrespondents 14 calendar days after the reminder letter is mailed*	Day 34
• Initiate telephone follow-up for nonrespondents 21 calendar days after second survey is mailed	Day 55–73
★ End data collection activities and close customer support telephone/email**	Day 73

*If mailout/email day falls on a Sunday or federal holiday, mail/email the following business day.

★ ** Vendors must accept and process data for all mail and internet surveys received through 2 weeks prior to the end of data submission (i.e., 11:59 p.m. ET on May 2, 2025). If vendors are still fielding the survey after May 2, 2025, they must accept and process data for all mail and internet surveys received through the end of the protocol (Day 73).

Additional Language Protocols

- Vendors and clients to determine best strategy to maximize response rates for Spanish/Chinese protocols
- Vendors may:
 - Select one language protocol for all enrollees in a reporting unit (based on direction from clients)
 - Use language preference indicators to determine which enrollees are placed in which language protocol
 - “Double stuff” materials (mail and internet)
- All letters mailed in English must include instructions in Spanish and/or Chinese (if applicable) on how to request materials in preferred language
- If an enrollee requests a Spanish or Chinese survey, it is strongly recommended that the vendor mails the survey within two business days
 - May attempt to complete an inbound Spanish/Chinese telephone interview during this request
- Vendors must accommodate enrollee requests to be contacted by telephone in Spanish/Chinese

Additional Language Protocols (cont'd)

Outreach Mode	English Only	Spanish Only	Chinese Only	English/Spanish Double Stuff	English/Chinese Double Stuff	Spanish/Chinese Double Stuff
Mail	Mailings in English only	Mailings in Spanish only	Mailings in Chinese only	Mailings include both English and Spanish	Mailings include both English and Chinese	Mailings include both Spanish and Chinese
Internet	Emails in English only	Emails in Spanish only	★Emails in Chinese only	Emails include both English and Spanish	★Emails include both English and Chinese	★Emails include both Spanish and Chinese
Telephone	Calls in English only	Calls in Spanish only	Calls in Chinese only	Calls in either English or Spanish	Calls in either English or Chinese	Calls in either Spanish or Chinese

Survey Management System

- ! Vendors **must** implement automated electronic Survey Management System (SMS) that:
 - Assigns deidentified unique ID to each sampled enrollee
 - Separates personally identifiable information (PII) from enrollee response data
 - Tracks sampled enrollee data and all key survey events
 - Tracks requests for Spanish/Chinese surveys
 - Tracks duplicate surveys
 - Links to internet survey and CATI system
 - Assigns disposition codes for each sampled enrollee
- ! Vendors log data collection activities in SMS within **24 hours**
- ! Vendors test system prior to implementation

Subcontractors

- ! **Not** permitted for sample frame receipt, survey sample selection, email/internet survey administration, or data preparation/submission
- Permitted for mail and telephone protocols, customer support, data receipt/processing
- Vendors must:
 - Provide oversight of subcontractors
 - Document subcontractor oversight processes in Quality Assurance Plans (QAPs)
 - Obtain signed confidentiality agreements from subcontractors
 - Attend subcontractor trainings
- Subcontractors must participate in all required Project Team oversight activities

Data Security and Confidentiality

- Vendors and subcontractors must:
 - Adhere to Health Insurance Portability and Accountability Act (HIPAA) requirements
 - Sign confidentiality agreements annually
 - Protect sampled enrollee PII
 - Safeguard both hardcopy and electronic data
 - Notify CMS of confidentiality or data breaches within 24 hours
 - Follow all data confidentiality and security requirements described in the 2025 Technical Specifications

Data Retention and Destruction

- Securely retain data in an environmentally controlled location for a minimum of three years, including:
 - Mail, telephone, and internet data
 - Original sample frame, deduplicated sample frame, and survey sample
 - Hardcopy or scanned images of returned mail surveys
- After three years (or as otherwise specified by CMS), securely destroy all data files

Mail Protocol



Mail Protocol Overview

- Vendors update and standardize addresses prior to start of mail protocol using commercial tools (e.g., National Change of Address [NCOA] database)
- Four mailing waves
 - Prenotification Letter
 - Two survey packets that include a survey cover letter, survey instrument, and business reply envelope
 - Reminder letter
- Mail materials available on [MQI website](#)
 - Content and format of vendor materials must not deviate from templates
 - Materials must follow all requirements outlined in 2025 Technical Specifications
 - ! Vendors may **not** revise materials after they are accepted by CMS
 - » The Project Team notifies vendors via email once materials are accepted

Mail Staff Training

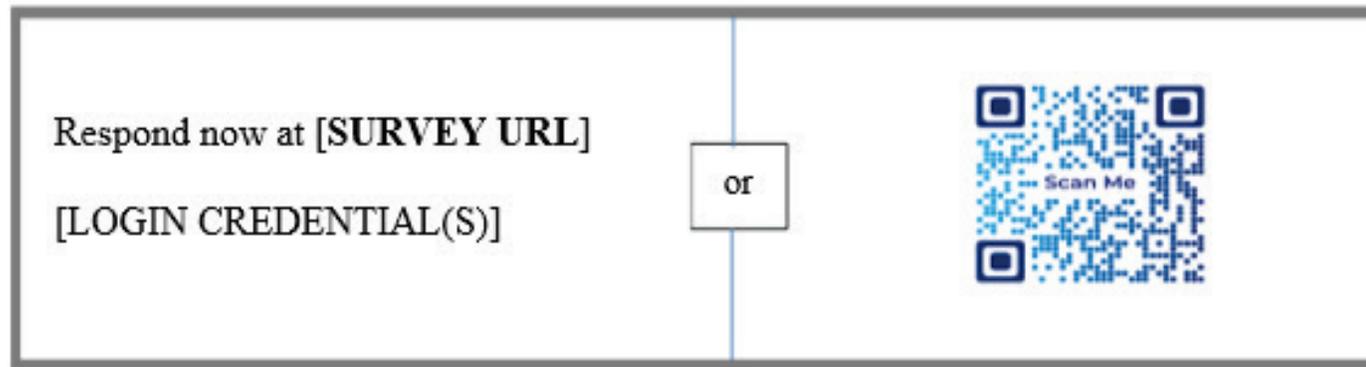
- Vendors must train all staff (including subcontractors) involved in mail processes on applicable specifications and protocols
- Training topics for mailing and data collection staff include:
 - Operation of relevant equipment and software (e.g., SMS, scanning equipment, data entry programs)
 - Role-specific survey protocols (e.g., required mail survey packet content, documenting/entering returned surveys into the tracking system)
 - QA procedures for mail production activities and mailout processes
 - Decision rules and coding guidelines for returned surveys
 - Proper handling of hard-copy and electronic data, including data security and storage requirements

Key Updates: Mail Protocol

- ★ Updated years and dates, as applicable, across all mail materials
- ★ Specified vendors must include an enrollee-specific QR code on prenotification and reminder letters that directs sampled enrollees to the internet survey landing page and automatically logs them into the survey
- ★ Specified QR codes must not be printed on first or second cover letters
- ★ Specified vendors administering the survey in Chinese must include the survey URL and log-in credentials for sampled enrollees to take the internet survey

QR Codes

- ★ Vendors must include a QR code on prenotification and reminder letters
 - Prenotification and reminder letters include internet survey URL and log-in credentials to inform enrollees of the internet survey option
 - A QR code direct respondents to the internet survey landing page and automatically logs them in to the survey
- ! Vendors must include instructions explaining how to use the QR code
- ★ QR codes **must not** be printed on the first or second cover letters



Mail QA Requirements

- Confirm printed materials match survey proofs accepted by the Project Team
- Integrate internal staff and CMS mail seeds directly into mailing database
- Make every reasonable attempt to contact sampled enrollees, regardless of completeness of mailing address
 - Record all attempts to update mailing address
- Log all QA checks to document their completion

Mail QA Requirements (cont'd)

- Interval check at least 10% of printed mailing pieces to confirm that:
 - Materials are visually acceptable (e.g., no smearing, misalignment, or bleed-throughs)
 - All pages are included in the survey
 - Printed materials are in an easily readable font of at least 11 points
 - Survey packet has accurate content, address information, and postage
 - Printed materials in a mailing envelope include the same unique identifier
 - Surveys and cover letters in a survey packet are matched to the same sampled enrollees and are in the same language
 - Number of survey packets to be mailed matches number of sampled enrollees

Collecting Data by Mail

- Send mailings according to the survey administration schedule (i.e., Day 1 to Day 34)
- Vendors strongly encouraged to use first-class postage or indicia to facilitate timely delivery and maximize response rates
- Vendors must verify mailout dates for all materials (e.g., USPS-generated report)
 - CMS may request documentation of mailout dates from vendors

Processing Inbound Mail

- Vendors process inbound mail using key-entry or optical scanning technology
- Record or scan surveys daily (within 24 hours) to designate as “received”
 - Cease additional contacts to enrollees who return a completed survey within 24 hours
 - Track date of receipt for each survey
 - Do not permit same survey to be scanned more than once
- Do not permit out-of-range or invalid responses
- Implement QA procedures to verify consistent and accurate scanning
- Assign a final disposition code to each sampled enrollee
- ! Include final responses from mail surveys received through May 2, 2025, in final data files
 - If vendors are still fielding the survey after May 2, 2025, they should accept and process all surveys received through the end of the protocol (Day 73)
 - Mail surveys received after this date must be shredded and disposed of securely

Decision Rules

Vendors implement decision rules to resolve ambiguous coding scenarios

Scenario	Decision Rule
Mark falls between two response options, but is obviously closer to one	Select option to which mark is closest
Mark is equidistant between two response options	Code as <i>Missing</i>
Value is missing	Code as <i>Missing</i> . Do not impute a response
More than one response is marked on a question that does not have instructions to “mark one or more”	Code as <i>Missing</i>
One response is crossed out and another response option is selected	Code the corrected response option
There is writing in the margins (e.g., N/A), but a separate response is clearly marked	Code the response clearly marked
Respondent leaves all response options blank for a question with instructions to “mark one or more”	Code all response categories as “Blank/Nonresponse/No Answer” (mail and internet surveys only)

Mail Survey Skip Patterns

- Screener/gate questions determine whether an enrollee should answer subsequent questions (i.e., a skip pattern)
- Some enrollees may:
 - Answer the screener question but leave follow up questions blank
 - Answer follow up questions that do not apply to them based on response to the screener question
- Vendors do **not** edit or clean responses

9. In the last 6 months, how often were the forms from your health plan easy to fill out?

- 1 Never
- 2 Sometimes
- 3 Usually
- 4 Always
- 99 Not Applicable; health plan did not give me forms to fill out → **If Not Applicable, go to #13**

10. In the last 6 months, how often did the health plan explain the purpose of a form before you filled it out?

- 1 Never
- 2 Sometimes
- 3 Usually
- 4 Always

Processing Undeliverable and Blank Surveys

- If a mail survey is returned **undeliverable**:
 - Make every reasonable effort to obtain a valid address
 - If unable to obtain valid address, attempt to contact enrollee by email/telephone
 - If a prenotification letter is returned undeliverable, do **not** contact sampled enrollee by telephone to obtain updated contact information
 - » Vendors may begin telephone phase early and assign Bad_Address_Flag if confirmation of bad address is received
- ! If a mail survey is returned **blank**:
 - Assign interim disposition code of X34 – Blank Survey Returned or Incomplete Survey
 - Do not mail a second survey; do attempt to contact during telephone phase
 - Do not assign final disposition code of X32 – Refusal unless enrollee explicitly refuses

Processing Duplicate and Ineligible Surveys

- If **duplicate** surveys are returned from the same enrollee:
 - Use the most complete survey (i.e., has most key items answered) regardless of mode
 - » If surveys are equally complete, use first survey received
- If a mail survey is returned with a note that the enrollee is **ineligible**:
 - Scan and store the survey for the required three-year period
 - Apply appropriate final ineligible disposition code based on illegibility reason (Exhibit 48):
 - » X20 – Ineligible: Deceased
 - » X40 – Ineligible: Not Eligible
 - » X43 – Do Not Survey List
 - » X22 – Language Barrier
 - » X24 – Mentally or Physically Incapacitated

Data Entry/Scanning Quality Assurance Procedures

- Review a sample of cases (recommended minimum of 10%) throughout mail protocol
- Scanning:
 - Review randomly selected hard-copy surveys and compare with the scanned entries
- Manual key-entry:
 - All surveys must be 100% rekeyed
 - Supervisors resolve discrepancies and verify correct values have been entered
 - Supervisors review a recommended minimum of 10% of cases coded by each data entry staff member

Survey Fielding or Mail Protocol Questions?

Internet Protocol



Internet Protocol Overview

- ! Must be made available for entire duration of data collection period
- Vendors send three emails to enrollees with embedded log-in credentials:
 - One notification email
 - Two reminder emails
- Vendors program internet survey and emails in alignment with the templates available on [MQI website](#)
 - Content and format must not deviate from templates
 - Must follow all programming and text convention requirements described in templates and 2025 Technical Specifications
- ! Vendors may **not** revise materials after they are accepted by CMS
 - » The Project Team notifies vendors via email once materials are accepted
- Program and test internet survey and emails before the prenotification letter is sent

Internet Staff Training

- Vendors must train all staff involved in internet processes on applicable specifications and protocols
- Training topics for internet staff include:
 - Use of relevant software
 - Role-specific QHP Enrollee Survey protocols
 - Proper handling of electronic data, including data security and storage requirements
 - QA procedures for the internet survey and emails

Programming the Internet Survey

- ! Optimize and test for use on mobile phones, tablets, and computers
- Allow sampled enrollees to complete in stages
 - Save all previously completed responses
 - Allow enrollees to return to previous questions
- Do not require enrollees to answer survey questions
- Program skip patterns and adhere to formatting/text conventions in internet script on [MQI website](#)
- Unless otherwise noted, program each question to accept only one response
- Include “Questions” link on each webpage (see internet script for required language)

Programming Notification and Reminder Emails

- Program notification and reminder emails in alignment with templates on [MQI website](#)
- Included a full, unique URL and a “Take Survey Now/Responda la encuesta ahora/立即参加问卷调查” button with embedded login credentials
- Include “Unsubscribe” link
- Test emails ahead of fielding
- Send emails on the following days:
 - Notification email: Day 7
 - First reminder email: Day 13
 - Second reminder email: Day 19

Note. The text for the two reminder emails is the same.

Key Updates: Internet Protocol

- ★ Updated years and dates in internet script and email templates, as applicable
- ★ Added the Chinese internet survey mode
- ★ Updated guidance to include references to the Chinese internet survey
- ★ Added tagline to English and Spanish prenotification and reminder emails for enrollees who would like to request the survey in Chinese (if applicable)

Key Updates: Internet Protocol (cont'd)

- ★ Added Chinese internet survey mode

您的健保计划

[SECTION HEADING MUST APPEAR ON EACH WEBPAGE THAT INCLUDES QUESTIONS 3-19.]

以下一系列问题将询问您对您健保计划的体验。请依据您于 2024 年 7 月到 12 月使用健保计划的体验回答问题。

[3] 在过去 6 个月中，您多常在书面资料或网络上找到您所需的关于您健保计划如何运作的资讯？

- 从未
- 有时
- 经常
- 总是
- 不适用；我没有寻找关于健保计划的任何资讯

Internet QA Requirements

- Confirm internet survey and emails match proofs accepted by the Project Team
- Seed internal staff and CMS directly into email distribution list
- Make every reasonable attempt to contact sampled enrollees, regardless of availability of complete email address
 - It is recommended that vendors run email addresses through an email verification service prior to fielding
- Log all QA checks to document their completion
- Confirm URL and QR code correctly directs enrollees to the log-in page

Internet QA Requirements (cont'd)

- Perform interval checking of emails to:
 - Confirm emails are matched to sampled enrollee
 - Confirm variable fills match sampled enrollee information
 - Check formatting
 - Verify working links
- Check programmed internet survey ahead of fielding to:
 - Confirm adherence to internet script
 - Check formatting
 - Verify skip patterns
 - Confirm that sampled enrollees cannot complete internet survey more than once

Collecting Internet Data

- Vendors use survey response data from all internet surveys, regardless of whether the survey was explicitly submitted by the respondent
 - *Example:* If a respondent logs into the survey, answers the first 40 questions, and exits the survey without submitting their data, vendors should collect and use the data for the first 40 questions (assuming enrollee does not later complete survey by mail or telephone)
- Cease contact to enrollees who return a complete internet survey within 24 hours

Undeliverable Emails and Unsubscribe/Do Not Survey

- If an email is returned as **undeliverable**:
 - Assign Bad_Email_Flag and stop further email communications
 - Continue to contact the enrollee by mail and telephone
- If an enrollee **unsubscribes** from email notifications:
 - Remove the enrollee from further email communications (recommended that vendors remove enrollees between two and five days of the request)
 - Continue to contact the enrollee by mail and telephone
- Vendors encouraged to maintain QHP-specific unsubscribe list

Internet Protocol Questions?



Telephone Protocol

Telephone Protocol Overview

- Vendors required to use computer-assisted telephone interviewing (CATI) system
- Required to use secondary source (e.g., telephone matching services) to obtain or update telephone numbers for sampled enrollees
- Make up to six call attempts over 19-day period (i.e., Days 55 to 73) to enrollees who:
 - Have not returned a complete survey by any mode
 - Returned a blank/partially complete survey
 - Have an invalid/undeliverable mailing address but valid phone number
- CATI script available on [MQI website](#)
 - Program CATI systems per the standardized script and requirements outlined in the 2025 Technical Specifications
 - CATI systems must follow skip patterns
 - Use consistent conventions throughout the script

Telephone Staff Training

- To ensure standardized data collection, vendors must train all telephone interviewers (including subcontractors) on applicable specifications and protocols
- Vendors must train telephone interviewers to:
 - Read questions and response choices verbatim
 - Probe to obtain appropriate responses
 - Maintain a professional, neutral tone
 - Minimize answer interpretation (i.e., only record answers that respondents specify)
 - Record the appropriate outcome of all call attempts
 - Operate CATI systems efficiently
 - Use of FAQs available on the [MQI website](#)
 - Refusal avoidance

Telephone Protocol Requirements

- CATI systems must:
 - Be operational by the start of survey administration to accommodate inbound requests for telephone interviews during mail/internet phases
 - Comply with federal and state laws, regulations, and guidelines
 - Link to the SMS
 - Adhere to all survey specifications and skip pattern logic
- Vendors must use secondary source to obtain updated telephone numbers
 - **Must** update Enrollee Phone 1; may update Enrollee Phone 2 if second number received
 - Handling of attempts to multiple phone numbers left to discretion of vendor
- Vendors test CATI programming ahead of survey administration
- ★ Vendors must adhere to the Telephone Consumer Protection Act of 1991 (TCPA) requirements set forth by the Federal Communications Commission (FCC)

Key Updates: Telephone Protocol

- ★ Updated years and dates, as applicable
- ★ Clarified vendors must meet TCPA guidelines and other federal and state regulations
- ★ Removed appendix of Frequently Asked Questions for Customer Support Staff and Interviewers and replaced references to the appendix in the 2025 Technical Specifications with references to the English, Spanish, and Chinese FAQs on the MQI website

Telephone QA Requirements

- At minimum, vendors must:
 - Review and confirm telephone script matches previously accepted screenshots
 - Verify CATI system correctly follows skip patterns and programming specifications
 - Test each response option (including “Don’t Know” and “Refused”) to confirm skip pattern logic
 - Verify capacity to support dialing volume (including additional languages)
 - Make every reasonable attempt to contact nonrespondents

Outbound Telephone Attempts

- Vendors make up to six telephone attempts to nonrespondents at different times of day, on different days of the week, and in different weeks over 19-day dialing period
- Definition of a Telephone Attempt:
 - Phone rings six times with no answer
 - Interviewer reaches voicemail
 - Interviewer reaches household or sampled enrollee, but enrollee is not available
 - » Interviewer attempts to schedule callback
 - Interviewer reaches a busy signal (up to three busy signals in a day may equal one attempt)
 - Interviewer placed on hold
- Vendors may leave up to two voicemail messages for sampled enrollees (review HIPAA requirements and document processes in QAP)

Inbound Telephone Interview Requests

- Vendors accommodate enrollee requests to take the survey over the phone throughout survey administration
- If interviewer not available at time of inbound request, schedule callback
- If enrollee not available at the time of a callback:
 - Make at least one additional attempt on the next day at the same time
 - If survey not conducted, continue standard mail, internet, and telephone protocols
 - Callback attempts do **not** count towards six required telephone attempts

Telephone Data Processing Requirements

- Include unique ID number for each enrollee in SMS and final data file
- Enter interview date in SMS and link interviews to appropriate variables (i.e., language, date)
- Remove all PII and protected health information (PHI) when data is transferred to final data file
- Assign final disposition code and include in final data file
- Review data files for accuracy
 - Compare responses from completed interviews directly from CATI system to corresponding responses in final data file
 - Recommended minimum of 10%

Telephone Interviewer Monitoring

- ! Vendors must silently monitor at least 10% of all interviews for each survey language
 - Must be conducted throughout entire telephone phase
 - Monitor both attempts and completed interviews
 - Callbacks permitted, but do not count towards the 10% monitoring requirement
 - Document outcomes using standard templates
- ! Vendors must not infer the respondent's answers
- Supervisory staff conduct "floor rounding" to assess professionalism
- ! For vendors using telephone subcontractors:
 - A combined total of 10% of interviews must be monitored by the vendor and/or subcontractor

Data Collection Considerations

- **Disenrollees:** Individuals who indicate they are no longer enrolled in the QHP
 - Discontinue contact across all modes to the enrollee
 - Assign final disposition of X40 – Ineligible
- **Proxy Respondents:** Someone who completes the survey on the enrollee's behalf
 - Vendors must modify CATI system programming to accommodate proxy interviews
 - Proxy permitted if a sampled enrollee is unable to respond to the survey
 - » Enrollee must consent to a proxy taking a survey on their behalf
 - » Proxy must be familiar with enrollee's health
 - If enrollee is physically/mentally unable to respond to the survey and unable/unwilling to grant permission to a proxy:
 - » Assign final disposition of X24 – Mentally or Physically Incapacitated



Customer Support

Customer Support Overview

- ! Vendors establish customer support toll-free telephone number and project-specific email address
- ! Must be operational by start of the mail phase and available for entire data collection period
- Requirements:
 - Answer at least 90% of incoming calls live within 30 seconds during regular business hours
 - Available in all fielded languages (i.e., English, Spanish, and Chinese [if applicable])
 - Program voicemailbox in all fielded languages; return voicemails within 24 hours or one business day
 - Respond to email inquiries within 24 hours or one business day
 - Track number of requests for language other than English, Spanish, or Chinese
 - Document and track all customer support inquiries
 - Test customer support systems ahead of survey fielding

Customer Support Staff Training

- Vendors train customer support staff on:
 - QHP Enrollee Survey requirements and methodology
 - Frequently Asked Questions document
 - » Available on [MQI website](#) in English, Spanish, and Chinese
 - Procedures for transferring calls to telephone interviewers or scheduling callbacks
- Customer Support Agent and Interview Guidance (Appendix D) provides guidance on best practices for customer support agents

Key Updates: Customer Support

- ★ Updated years, as applicable
- ★ Removed appendix of Frequently Asked Questions for Customer Support Staff and Interviewers and replaced references to the appendix in the 2025 Technical Specifications with references to the English, Spanish, and Chinese FAQs on the [MQI website](#)

Customer Support QA Requirements

- To reduce survey fielding errors and facilitate high quality customer support, vendors must:
 - Review at least 10% of customer support responses to confirm accuracy and professionalism
 - Confirm responses for all fielded languages are provided within 24 hours or one business day
 - Confirm that all requests for scheduled telephone surveys are met

Telephone Protocol and Customer Support Questions?



Data Coding, File Specifications, and Submission

Data Coding, Specifications, and Submission Overview

- Data coding and file specifications
 - Processing written text responses
 - Determining enrollee eligibility
 - Key items and complete survey definition
 - Disposition codes
 - Survey round variables
 - Data dictionary
 - Quality control procedures
- Data submission process

Note. See Section 17: Code and submit data for detailed data coding and submission requirements.



Data Coding and File Specifications

Processing Written Text Responses

- Vendors submit open-ended responses to Question 2 in data files
- Enter responses exactly as written
- Redact PII and PHI (e.g., only submit the QHP name in the data submission file)
- Do not edit or correct misspellings
- Include enrollees who wrote in only a product type (e.g., HMO, POS, PPO, EPO) as eligible regardless of whether product type aligns with associated reporting unit

2. What is the name of your health plan?

Please print:

Note. See Exhibit 52 for additional detail.

Determining Enrollee Eligibility

- Questions 1 and 2 determine enrollee eligibility
 - See Exhibit 53 for detailed guidelines
- QHP issuers provide list of common plan name aliases
 - See Exhibit 54 for additional common valid/invalid plan aliases
- If an enrollee's response to Question 2 varies significantly from list of common aliases, they are considered ineligible
- Telephone interview scripts must accommodate enrollee eligibility rules

1. Our records show that you are now in the health plan named on the front page. Is that right?

¹ Yes → **If Yes, go to #3**

² No

2. What is the name of your health plan?

Please print:

Key Survey Items

- 2025 QHP Enrollee Survey has 19 key items
 - See Exhibit 57 for a complete list of key items
- Key items are survey questions that all respondents are eligible to answer, excluding the “About You” items

Definition of a Complete Survey

- **Complete Survey:** Sampled enrollee answers $\geq 50\%$ (at least 10) of the key items
 - Vendors make no additional attempts to enrollees who return a complete survey
- **Partially Complete Survey:** Enrollee answers $< 50\%$ of the key items
 - Required to continue following up with enrollee to obtain complete survey
- If an enrollee completes more than one survey:
 - Use survey with most key items answered (regardless of survey mode)
 - If equally complete, use first survey received
- If an enrollee is deceased:
 - Do not retain data if completed by someone else after death
 - Retain data if completed by enrollee prior to death

Disposition Codes

- Designate survey status for each enrollee
- ! Vendors must maintain up-to-date, accurate disposition codes
- Interim disposition codes
 - Represent current survey status
 - Used for internal tracking purposes
 - ! Include crosswalk of interim to final disposition codes in QAP
- Final disposition codes
 - Represent final survey status of enrollees
 - Assigned prior to data submission

Note. Exhibit 55 includes final disposition codes and guidelines for coding the Date_Complete variable.

Final Disposition Codes

Code	Description	Date_Complete Guidelines
M, I, or T10	Completed survey	Code as date completed survey was received or administered
M, I, or T31	Partially completed survey	Code as date partially completed survey was received or administered
X20	Ineligible: Deceased	Code as date it is determined enrollee is deceased
X40	Ineligible: Not Eligible	Code as date it is determined enrollee does not meet all required eligibility criteria for being included in survey sample
X43	Do Not Survey List	Code as first date of fielding for reporting unit
X22	Language Barrier	Code as date it is determined that a language barrier prevents the sampled enrollee from completing the survey
X24	Mentally or Physically Incapacitated	Code as date it is determined a mental or physical incapacity or institutionalization prevents the sampled enrollee from completing the survey
X32	Refusal	Code as date sampled enrollee or proxy refuses to complete survey (verbally or in writing)
X33	Nonresponse after Maximum Attempts	Code as last date of fielding for the reporting unit
X34	Blank Survey Returned or Incomplete Survey	Code as date the blank survey or incomplete survey was received or administered
X35	Bad Contact Information	Code as latest date it is determined that contact information is not viable

Note. See Exhibit 55 for additional detail.

Survey Round Variables

- Must be assigned to each sampled individual
- Provide detail on which round of outreach a mail or telephone survey was completed or partially completed
- Must be associated with mailed questionnaire or call attempt in which data were collected
- For disposition codes other than M/T/I10 or M/T/I31, code Survey Round as NC
- For I10 and I31 disposition codes, code Survey Round as IN

Survey Round	Description	Disposition Codes
M1	Respondent completely/partially completed first mail questionnaire	M10, M31
M2	Respondent completely/partially completed second mail questionnaire	M10, M31
T1–T6	Respondent completed/partially completed survey during the first, second, third, fourth, fifth, or sixth telephone attempt, respectively	T10, T31
TN	Respondent completed/partially completed survey during inbound call	T10, T31
IN	Respondent completed/partially completed internet survey	I10, I31
NC	Used for all final disposition codes that are not M/T/I10 or M/T/I31	X20, X40, X43, X22, X24, X32, X33, X34, X35

Key Updates: Data Dictionary (Appendix F)

★ Revised values for QHP_State and Reporting_Unit_ID to note that values must be provided in capitalized letters

Field	Question Number	Description	Valid Values	Data Type	Max Field Size
QHP_State		State associated with enrollee's QHP <i>(from the sample frame provided by the QHP issuer)</i>	2-character Postal Service state abbreviation Note: This value will be the same for all individuals in the reporting unit (Reporting_Unit_ID). ★ Note: This value must be provided in capitalized letters.	Char	2
Reporting_Unit_ID		Reporting Unit ID <i>(from the sample frame provided by the QHP issuer)</i> . It is made up of the following parts (with a hyphen separating each part): 5-digit Issuer ID, 2-character QHP state postal code, and 3-character Product Type. For example: 12345-TX-PPO.	This value will be the same for all individuals in the reporting unit (Reporting_Unit_ID). ★ Note: This value must be provided in capitalized letters.	Char	12

QA Procedures

- ! Ongoing QA checks for data files:
 - Run frequencies and count distributions on administration and response data
 - Check data processing programs to confirm proper coding
 - Verify surveys are assigned a complete/partially complete disposition code
 - Review disposition codes for discrepancies between presence of response data and assignment of ineligible/nonresponse final disposition codes
 - Select and review a sample of coded cases (recommended minimum of 10%)
 - Compare hardcopy responses to scanned responses to responses entered in data files (recommended minimum of 10%)
 - Calculate and review response rates on periodic basis

Note. Checks must be performed by a different staff member than the individual who originally performed the task.

QA Procedures (cont'd)

! Question 2 QA checks:

- Review all plan aliases provided for Q2 and evaluate whether these responses (in conjunction with Q1 responses) render the sampled enrollee as eligible or ineligible
- Review Q2 responses for:
 - » Double quotes
 - » Tabbed spacing
 - » Line breaks
 - » Double spaces between words and after periods

QA Procedures (cont'd)

! Question 27 QA checks:

- Review question 27 coding for telephone records
 - » Split into Q27A and Q27B for telephone only
- Report only a single value for Q27

27A. In the last 6 months, how many times did you visit your personal doctor to get care for yourself? Include in-person, telephone, or video appointments.

(READ RESPONSE OPTIONS ONLY IF NECESSARY. IF READING RESPONSES, SAY: **Would you say...**)

(IF RESPONDENT IS CONFUSED ABOUT “NOT APPLICABLE,” SAY: **Not applicable because you do not have a personal doctor?**)

- | | |
|---|------------------------------------|
| <input type="checkbox"/> 0 NONE | → [IF NONE, GO TO #27B] |
| <input type="checkbox"/> 1 1 TIME | → [IF 1 TIME, GO TO #28] |
| <input type="checkbox"/> 2 2 | → [IF 2, GO TO #28] |
| <input type="checkbox"/> 3 3 | → [IF 3, GO TO #28] |
| <input type="checkbox"/> 4 4 | → [IF 4, GO TO #28] |
| <input type="checkbox"/> 5 5 TO 9 TIMES | → [IF 5 TO 9 TIMES, GO TO #28] |
| <input type="checkbox"/> 6 10 OR MORE TIMES, OR | → [IF 10 OR MORE TIMES, GO TO #28] |
| <input type="checkbox"/> -5 NOT APPLICABLE? | → [IF NOT APPLICABLE, GO TO #40] |
| <input type="checkbox"/> -1 REFUSED | → [IF REFUSED, GO TO #40] |
| <input type="checkbox"/> -2 DON'T KNOW | → [IF DON'T KNOW, GO TO #40] |

27B. Is that because you have a personal doctor but did not visit them in the last 6 months, or is that because you do not have a personal doctor?

(READ RESPONSE OPTIONS ONLY IF NECESSARY. IF READING RESPONSES, SAY: **Would you say...**)

- | | |
|---|------------------------------|
| <input type="checkbox"/> 0 YOU HAVE A PERSONAL DOCTOR BUT DID NOT VISIT THEM IN THE LAST 6 MONTHS; OR | → [GO TO #40] |
| <input type="checkbox"/> -5 YOU DO NOT HAVE A PERSONAL DOCTOR? | → [GO TO #40] |
| <input type="checkbox"/> -1 REFUSED | → [IF REFUSED, GO TO #40] |
| <input type="checkbox"/> -2 DON'T KNOW | → [IF DON'T KNOW, GO TO #40] |

Calculating the Response Rate

Response Rate: Total number of completed surveys divided by the total number of sampled enrollees selected for the survey sample

$$\text{Response Rate (RR)} = \frac{C}{(C + E) + (R + O) + (X * U)}$$

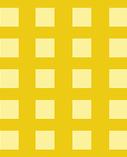
where

- C = Completed Surveys (disposition code 10)
- E = Partially Completed Surveys (disposition code 31)
- U = Cases with Unknown Eligibility (disposition codes 33, 34, and 35)
- O = Other Disposition (disposition codes 22 and 24)
- R = Refusal (disposition code 32 or 43)
- I = Ineligible (disposition code 20 or 40)
- X = Proportion of cases eligible for this survey, which is calculated as:

$$X = \frac{C + E}{C + E + I + O + R}$$

Note. The response rate formula is based on the standard definitions established by the American Association for Public Opinion Research, specifically the Response Rate 3 formula.

Data Submission



Data Submission Process

- Vendors submit test and final data files to CMS via the [QHP Enrollee Survey website](#)
 - ★ Vendors email one data submission summary log per ZIP file, specifying the date the file was uploaded to the QHP Enrollee Survey website
 - Vendors must register to access the website
 - ★ Vendors are strongly encouraged to submit final data files early in the data submission period
- Data submission training: **February 27, 2025**
 - Complete instructions for accessing the QHP Enrollee Survey website and submitting test and final data files provided during the training
- Contact the Project Team for technical support: QHP_Survey@air.org



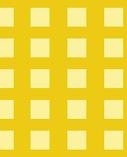
Data Submission Process (cont'd)

- Vendors produce one CSV data file for each reporting unit
- Naming convention for data files:
 - An uploaded ZIP file may contain multiple test data files with the following naming convention: <Reporting Unit ID>.csv
 - ★ To assist with tracking multiple submissions, ZIP files should use the following naming convention: <VendorName>_Submission_<Letter>.zip
 - ★ For example, vendors should use <VendorName>_Submission_A.zip for the first ZIP file, <VendorName>_Submission_B.zip for the second ZIP file, and so on
 - ★ Emailed data submission summary logs should use the following naming convention: <VendorName>_Submission_<Letter>_Log.xlsx
- The Project Team will reject an entire ZIP file if any CSV files within the ZIP file violate the CSV naming convention

Data Submission Process (cont'd)

- ! Test data submission: April 9–11, 2025
 - Submit at least one unencrypted test ZIP file containing files for two reporting units, including at least 100 records across the two reporting units
 - Test files may include > 100 records; may submit more than two files
 - ★ Email the Project Team one data submission summary log per ZIP file, specifying the date the file was uploaded to the [QHP Enrollee website](#)
- Final data submission: May 9–16, 2025
 - Files received late will be excluded from QRS and public reporting
 - ★ Vendors are strongly encouraged to submit final data files early in the data submission period
- Data file resubmission: May 19–21, 2025
 - Revised data files must be submitted within three business days

Data Coding, Specifications, and Submission Questions?



Data Analysis and Public Reporting

Data Analysis and Public Reporting Overview

- CMS analyzes data
- Vendor analysis and reporting
- QI reports
- QRS measures

Note. See Sections 18 for detailed data analysis and public reporting information.

CMS Analyzes Data

- CMS cleans vendor-submitted data using a forward-cleaning approach, meaning “screener” item responses control how subsequent items are treated
- Depending on responses to “screener” items, CMS may:
 - Retain original responses for subsequent/dependent items
 - Set responses to subsequent/dependent items to a missing value
- CMS concatenates cleaned data files into a single person-level analytic data file and calculates survey composite and individual item scores for each reporting unit using analysis code based on the CAHPS[®] macro
- Vendors **never** clean or recode survey response data

Vendor Analysis and Reporting

- Vendors may provide reporting-unit level datasets for questions 3–67 and the final disposition code breakdown to QHP issuers
 - **Must** communicate that vendor scores are **not** official CMS scores
 - **May not** provide member-level datasets to QHP issuers
- Vendors may submit deidentified member-level datasets to regulatory agencies on behalf of QHP issuer clients (e.g., states and state insurance commissioners)
 - May include person-level responses for questions 3–10, 19–24, and 26–43
 - ! May include reporting unit identification number <reporting-unit-id> from sample frame
 - **May not** include person-level responses for questions 1–2, 11–18, 25, and 44–67
 - ! **May not** include information from sample frame or sampled enrollee list (except for reporting unit identification number)

QI Reports

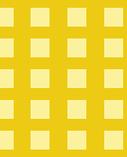
- CMS produces quality improvement (QI) reports for all reporting units that field the 2025 survey
 - Includes results for QHP Enrollee Survey global ratings, composite measures, and preventative services
 - Largely aligns with CAHPS 5.0H composite structure
- Reports available to issuers via CMS HIOS-MQM website

QRS Measures

- The QRS includes a subset of measures from the QHP Enrollee Survey
 - Includes access to care, access to information, care coordination, plan administration, rating of all health care, rating of health plan, rating of personal doctor, rating of specialist, and smoking and tobacco use cessation
- See Exhibit 65 for full list of composites and questions

Data Analysis and Public Reporting Questions?

Quality Oversight



Overview

- Quality oversight activities
 - Before survey administration
 - During survey administration
 - After survey administration
 - Ongoing
- Project reporting
- Technical support

Note. See Sections 19 for detailed quality oversight requirements.

Quality Oversight Activities

- The Project Team conducts oversight of all vendors to facilitate compliance with survey protocols
- All vendors and subcontractors (if applicable) must participate
- Vendors submit all reports and materials to QHP_Survey@air.org unless otherwise specified
- ! Project Team activities are **not** a substitute for the vendor's own quality assurance activities

Before Survey Administration

Oversight Activity	Deadline
Mail material review	October 11, 2024
Report #1: Quality Assurance Plan (QAP)	October 18, 2024
Internet material review	November 1, 2024
Telephone screenshot review	November 15, 2024
Data record review*	December 2024
Telephone script review sessions	Mid to late January 2025

*Returning vendors only.

Mail Material Review

- Submit final, print-ready templates for prenotification letters, first and second survey cover letters, reminder letters, questionnaires, outbound envelope, and business reply envelope
 - English and Spanish required; Chinese if applicable
 - Submit in PDF format
 - Due **Friday, October 11, 2024**
- Common findings:
 - Incorrect font and font size
 - Incorrect formatting
 - Mismatch of customer support telephone number, hours, and local time zone across materials
- Project Team provides feedback within 10 business days
- Vendors submit revisions within 10 business days of request
- ! Vendors may **not** revise materials after they are accepted by CMS
 - The Project Team notifies vendors via email once materials are accepted

Report #1: Quality Assurance Plan (QAP)

- Documents vendor compliance with survey protocols and 2025 Technical Specifications
- Only required for vendors with QHP issuer clients
 - If a vendor obtains a client after the QAP submission deadline, the vendor must prepare and submit a QAP within 10 business days of contracting
- Must follow the Model QAP template (Appendix C)
 - Clearly label each item and present information in specified order
 - Submit as Microsoft Word document
 - Returning vendors submit previously accepted QAPs in track changes
- Due **Friday, October 18, 2024**

Report #1: QAP (cont'd)

- Project Team provides feedback within 10 business days
- Vendors submit revisions within 10 business days of request
- Project Team conducts conference calls to discuss QAPs, if needed
- Common findings
 - Outdated protocols
 - Missing detail regarding additional language protocols and oversight
 - Incomplete organizational chart (e.g., missing subcontractors)
- ! Acceptance of QAP does not constitute CMS's approval or endorsement of vendor processes

Internet Material Review

- Submit internet survey URL, with at least:
 - 12 usernames and/or passwords that replicate how internet survey log-in credentials appear on mail letters
 - 12 unique URLs with embedded log-in credentials that replicate embedded log-in credentials that appear in email notifications
 - ★ 12 unique QR codes
- English and Spanish required; Chinese if applicable
- Due **Friday, November 1, 2024**
- Common findings:
 - Missing or nonworking FAQ link
 - Mismatch of customer support telephone number, hours, and local time zone across materials
- Project Team provides feedback within 15 business days
- Vendors submit revisions within 5 business days of request
- ! Vendors may **not** revise materials after they are accepted by CMS
 - The Project Team notifies vendors via email once materials are accepted

Telephone Screenshot Review

- Submit screenshots of programmed telephone interviewing script
 - Submit in PDF format
 - One question per page preferred
- English and Spanish required; Chinese if applicable
- Due **Friday, November 15, 2024**
- Common findings:
 - Missing or incorrect instructions and/or probes
 - Missing emphasis
- Project Team provides feedback within 10 business days
- Vendors submit revisions within five business days of request
- ! Vendors may **not** revise materials after they are accepted by CMS
 - The Project Team notifies vendors via email once materials are accepted

Data Record Review

- Conducted remotely with returning vendors
- Tracks person-level records through vendor SMS during each phase of administration (i.e., from sample file receipt through data submission) and confirms:
 - Data files and source materials are easily retrievable
 - Accurate application of disposition codes and other variables
 - Accurate response coding based on source files
- Project Team provides case IDs for review one business day prior to session
- Timeframe: **December 2024**
 - Project Team may conduct additional reviews with new or returning vendors during fielding, as needed

Telephone Script Review

- Project Team reviews telephone script programming after acceptance of telephone screenshots
- Occurs via web conferencing or independently via remote access
 - Vendors provide temporary CATI log-in credentials for independent reviews
- Review skip pattern logic and alignment with accepted materials
- English and Spanish required; Chinese if applicable
 - ! Notify Project Team ahead of session if the Spanish and/or Chinese scripts are overlaid onto the English programming
- Session required with each subcontractor
- Project Team holds additional session to verify revisions, if needed
- Timeframe: **January 2025**

During Survey Administration

Oversight Activity	Timeframe
Seeded Mail and Email Review	February–April 2025
Remote Visits	March 2025
Customer Support Review	March 2025
Test Data Submission	April 9–11, 2025
Telephone Interviewer Monitoring	April 2025

Seeded Mailings

- Assess timeliness of delivery, accuracy and readability of materials, and functionality of internet survey links/log-in credentials
- ! Seed Project Team and at least one internal staff member directly in survey mailing database
 - Project Team address is included in the 2025 Technical Specifications
- ! Seed one reporting unit for each language implemented
- If using multiple print/mail facilities and/or subcontractors, seed Project Team in one reporting unit at each facility in each language administered

Seeded Emails

- Assess timeliness of delivery, accuracy of email and internet survey content, and survey link/log-in credential functionality
- ! Seed Project Team (QHP_Survey@air.org) directly into email protocol for one reporting unit in English, Spanish, and Chinese (if applicable)
- ! If “double-stuffing” emails, do not send English-only, Spanish-only, or Chinese-only emails
- Ensure all fills (e.g., QHP issuer logo, enrollee first and last name, QHP issuer name and title of senior executive from vendor/QHP issuer) are appropriately populated

Remote Visits

- Conducted via web conferencing
- Evaluate vendor's compliance with QHP Enrollee Survey requirements
- Review items may include:
 - Survey management system
 - Enrollment confidentiality and data security
 - Sampling protocols
 - Data collection protocol (mail, internet, and telephone) and related facilities
 - Data coding and submission
 - Customer support
 - Timeframe: **March 2025**

Customer Support Review

- Project Team anonymously contacts vendor customer support telephone lines and email addresses and asks standard set of questions from FAQ (on the [MQI website](#) in English, Spanish, and Chinese)
- Assess responses for timeliness, accuracy, and alignment with FAQ and Telephone Customer Support Agent and Interviewer Guidance (Appendix D)
- May review systems in Spanish and Chinese (if applicable)
- Common findings:
 - Incorrect responses
 - Calls consistently not answered live
 - Email responses not provided within required 24-hour timeframe
- Train customer support agents on revised FAQs
- Timeframe: **March 2025**

Telephone Interview Monitoring

- Silent monitoring conducted via web conference
- Assess interviewer compliance with telephone specifications
- Project Team will work with vendors to determine session frequency and duration based on call volume
- ! Ensure telephone interviewers are trained to:
 - Properly probe during interviews
 - Read the telephone script verbatim
 - Follow interviewer instructions
- Timeframe: **April 2025**

Test Data Submission

- Submit test data files via the [QHP Enrollee Survey website](#)
- Website registration required
- Project Team reviews test data files for coding accuracy and notifies vendors of errors, if applicable
- Project Team hosts data submission training on February 27, 2025
- Timeframe: **April 9–11, 2025**

After Survey Administration

Oversight Activity	Timeframe
Data Submission	May 9–16, 2025
Data Resubmission	May 19–21, 2025

Data Submission and Resubmission

- Submit all data files via the [QHP Enrollee Survey website](#)
- Website registration required
- Submitted data must pass initial website validation checks *and* Project Team QA checks
- Project Team notifies vendors of validation errors and requests data resubmission, as needed
- Vendors resubmit revised data files, as needed, within three business days of request
- Data Submission Timeframe: **May 9–16, 2025**
- Data Resubmission Timeframe: **May 19–21, 2025**

Ongoing Activities

Oversight Activity	Timeframe
Exception Requests	Ongoing
Discrepancy Reports	Ongoing
Corrective Action Plans	Ongoing
Project Reports	Ongoing
Technical Support	Ongoing

Exception Requests

- Submit to QHP_Survey@air.org prior to fielding for any variations from 2025 Technical Specifications and survey requirements
 - Includes variations in operations, survey materials, and other alternative approaches
- Form available on [MQI website](#)
 - Complete entire form with sufficient detail
- Submit one Exception Request Form for each proposed exception
- ! Project Team must accept Exception Request Form before implementation (acceptance valid for one year)
- Renewal/Update Exception Requests: Submit the previously accepted Exception Request Form in tracked changes

Discrepancy Reports

- Required for any survey administration errors or deviations from the 2025 Technical Specifications and survey requirements
- Template available on [MQI website](#)
- ! Submit initial report to QHP_Survey@air.org within 24 hours of discrepancy discovery
- ! Submit a second report within two weeks of initial report if all required information is not immediately available
- Complete entire form in sufficient detail

Corrective Action Plan

- Issued when vendor:
 - Fails to demonstrate adherence to protocols and guidelines
 - Experiences ongoing problems during fielding
- Schedule and status determined by CMS
- Potential outcomes for continued noncompliance:
 - Loss of “approved” status to administer the QHP Enrollee Survey
 - Increased oversight of vendor activities
 - Adjustment to publicly reported scores, as needed
 - Other sanctions, as deemed appropriate by CMS

Vendor Oversight Reports

Submit all reports to QHP_Survey@air.org

- Subject Line: [VENDOR NAME] Report [#] Submission (e.g., XYZ Inc. Report #1 Submission)

Report	Activity	Content	Due Date
#1	Vendor QAP	<ul style="list-style-type: none">• Addresses all required elements of survey administration	October 18, 2024
#2	Preliminary QHP Client List	<ul style="list-style-type: none">• Client list for reconciliation• Oversampling requests	January 8, 2025
#3	Final QHP Client List	<ul style="list-style-type: none">• Final QHP client list• Sample frame receipt status	February 7, 2025
#4	Interim Progress Report	<ul style="list-style-type: none">• Fielding status for each QHP reporting unit• Summary of customer support calls and emails• Count of other additional language requests	April 4, 2025
#5	Final Report	<ul style="list-style-type: none">• Discussion of survey implementation and lessons learned• Count of other foreign language requests• Recommendations for next year	May 23, 2025

Summary of Key Updates: Quality Oversight

- ★ Specified that vendors may not revise materials after they are accepted by CMS
- ★ Specified vendors are required to submit at least 12 unique QR codes for the internet material review
- ★ Specified vendors implementing Chinese protocol are required to submit internet and email materials in Chinese for review and seed the Project Team in the email protocol in Chinese for one reporting unit

Vendor Quality Oversight Questions?



Wrap-Up and Next Steps

Next Steps

- Training Evaluation
 - Vendors will receive an email following training with instructions to complete the training evaluation
 - Designate **one** person from your organization to complete the evaluation
 - Completion required to obtain final approval
 - Due: **Tuesday, October 1, 2024**
- Final approval notifications will be sent **by Thursday, October 3, 2024**
- Training slides and the final approved vendor list to be posted on the [MQI website](#)

Final Questions?



Thank You!
