

December 19, 2014

**To: Medical Carriers for K-12 School Districts in the State of Washington**

**From: OIC K-12 Health Benefits Data Collection Project Team**

**CC: Office of the Insurance Commissioner (OIC)**

**Re: Year 3 Carrier Data Call - OIC Request for K-12 Health Benefits Data, as mandated by ESSB 5940**

Hello again everyone. Thank you for your great work in responding to the Data Call for Year 2 (Y2) of the OIC K-12 School District Employee Health Benefits Data Collection Project. Please note that the report (and associated exhibits) based on data collected during Y2 may be viewed at this web address:  
[www.insurance.wa.gov/about-oic/commissioner-reports/index.html](http://www.insurance.wa.gov/about-oic/commissioner-reports/index.html)

The purpose of this memo is to announce the commencement of the Data Call process for Year 3 (Y3) of the OIC K-12 Data Collection Project and also to ask for your input.

Please review the attached draft Year 3 Carrier Instructions and Data Collection Spreadsheet. Please note that changes to the Data Collection Spreadsheet in Y3 (as compared to Y2) are very minimal, whereas the Carrier Instructions document has been significantly updated and (we hope) improved. The means of providing feedback to the project team are identified below under the heading 'Carrier Review'.

For further information on ESSB 5940, on the rules associated with this legislation, or about Treinen Associates Inc. please see the section below entitled 'Further Information - Links'.

### **Data Call Description and Format**

As in Y2, data will be submitted by means of a spreadsheet with multiple tabs, each corresponding to a Section, as described in the Data Call Instructions. The Y3 Data Collection Spreadsheet contains some improvements over that of Y2, including more thorough data validations that are performed by the Check My Spreadsheet macro. The required data and the Data Collection Spreadsheet are described in detail within the attached Carrier Instructions document.

To facilitate your submissions you may use the eleven (11) empty file templates in .CSV format that will, in due course, be posted to the OIC's web site. These may be used as the output file definition for any queries or extract routines that you may run against your own in-house databases. However, please make sure that you submit your data using the Data Collection Spreadsheet – this should make your task easier, as it contains the Check My Spreadsheet macro that allows you to pre-validate many aspects of your data before submitting it.

### **Submission Method - ShareFile**

In Y3 we will again use ShareFile.com as the data transport mechanism. Information on this service may be found on the service's website, which is [www.ShareFile.com](http://www.ShareFile.com). If you have specific concerns about the data security arrangements of Sharefile.com, please see: [www.ShareFile.com/industries/business/security.aspx](http://www.ShareFile.com/industries/business/security.aspx).

A secure Sharefile.com account will be set up for the exclusive use of each carrier. Information about ShareFile is provided in the Year 3 Carrier Instructions.

## **Next Steps**

12/19/14

Date that the draft Data Call (Carrier Data Collection Spreadsheet and Carrier Instructions) is being distributed to carriers for review.

01/19/15

Individual Sharefile accounts will be set up for all carriers. A notification email will be sent from Sharefile (the sender's email ID will be [noreply@sf-notifications.com](mailto:noreply@sf-notifications.com)) asking each carrier to log into their Sharefile account and change the password.

## **Carrier Review**

12/19/14 - 1/23/15

During this time, carriers are invited to review and provide feedback on the draft Data Call. Feedback may be provided in writing or by telephone or both.

If you wish to provide feedback in writing, please submit your comments to Jack Peters by January 23, 2015 at [jpeters@treinenassociates.com](mailto:jpeters@treinenassociates.com) with copy to [Y3DataCallTeam@Treinen.com](mailto:Y3DataCallTeam@Treinen.com).

Several conference calls (see below) will take place in January 2015, during which carriers may discuss the Data Call with members of the project team and ask questions.

January 2015

Conference calls will take place to discuss the draft Data Call and answer carriers' questions. These calls will be hosted by the OIC, with support from Treinen team members. Please therefore expect a series of invitations for conference calls during January 2015 from Stacy Middleton at the OIC ([StacyM@oic.wa.gov](mailto:StacyM@oic.wa.gov)).

Dates and times for the Carrier Review conference calls are 1/8/15, 1/15/15 and 1/22/15 from 1:30 to 2:30 pm. A dial-in number will be provided by Stacy Middleton.

1/23/15

Carrier Review is complete. By this date, carriers should have provided comments on the draft Data Call, if they wish to do so.

## **Data Call**

1/30/15

The final version of the Carrier Data Call will be posted to the OIC website at [www.insurance.wa.gov/for-insurers/data-calls-reporting/special-data-calls/k-12-health-benefits-data-collection/carriers/index3.html](http://www.insurance.wa.gov/for-insurers/data-calls-reporting/special-data-calls/k-12-health-benefits-data-collection/carriers/index3.html)

## **Data Collection**

5/31/15

Deadline for all carrier data submissions.

## **Data Validation**

6/1/15 – 8/31/15

During this period of time the project team will run thorough and extensive validation routines against carrier-submitted data. In the process of doing so we may discover data anomalies. If so, we will contact carriers for explanations and/or corrections to the submitted data.

## Questions or Comments?

For questions please contact Jack Peters at [jpeters@treinenassociates.com](mailto:jpeters@treinenassociates.com) with copy to [Y3DataCallTeam@Treinen.com](mailto:Y3DataCallTeam@Treinen.com).

Thank you,

Jack Peters

On behalf of the OIC K-12 Health Benefits Data Collection Project Team

## Further Information - Links

### ESSB 5940

The original legislation may be found here:

<http://apps.leg.wa.gov/documents/billdocs/2011-12/Pdf/Bills/Senate%20Bills/5940-S.E.pdf>

### Treinen Associates Inc.

Treinen Associates' web site:

[www.treinenassociates.com/](http://www.treinenassociates.com/)

### OIC Rules

The OIC's rules (CR-103P) associated with ESSB 5940 are available on the OIC's web site:

[www.insurance.wa.gov/laws-rules/legislation-rules/recently-adopted-rules/documents/2012-21103P.pdf](http://www.insurance.wa.gov/laws-rules/legislation-rules/recently-adopted-rules/documents/2012-21103P.pdf)

Note: These rules should be viewed as guidance only since many clarifications and modifications have been made since their initial publication. Also, the initial Data Call referenced in the rules document has been modified to improve carrier reporting.