



**ASC X12 Standards for Electronic Data Interchange  
Technical Report Type 3**

# **Benefit Enrollment and Maintenance (834)**

## **Change Log: 005010 - 007030**

SEPTEMBER 2016

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Location	X333   Benefit Enrollment and Maintenance 2.3 Transaction Set Listing
Action	<b>Modify Segment Repeat</b> PER: in implementation for Loops 2100A, 2100F, 2100G (position 0400) Change segment repeat from 1 To 5
CR 1114	There is a need for more contact numbers than the TR3 currently supports. There also needs to be guidance for how to identify the preferred contact method. May need additional qualifiers for other contact methods such as text and an alternate contact not living in your household.
Location	X333   Benefit Enrollment and Maintenance   834   0100 ST - Transaction Set Header
Action	<b>Modify Data Element Note</b> Changed to "The Transaction Set Control Numbers in ST02 and SE02 must be identical. The number is assigned by the originator and must be unique within a functional group (GS-GE). For example, start with the number 0001 and increment from there. The number also aids in error resolution research."
CR 999	Revise the ST02 notes across the TR3's to make them consistent.
Location	X333   Benefit Enrollment and Maintenance   834   0200 BGN - Beginning Segment
Action	<b>Modify Data Element Code Note</b> on DTP01 code 00 (Original): From If the original transaction has already been processed, an incoming transaction using this code may be rejected by the receiver. The rejection will be identified to the sender by telephone or other direct contact.  The "00" indicates the first time the transaction is sent.  To Use when the transaction is being sent for the first time.  Explanation: If the original transaction has already been processed, an incoming transaction using this code may be rejected by the receiver. The rejection will be identified to the sender by telephone or other direct contact.
CR 1396	Revise the code value notes for consistency.
Location	X333   Benefit Enrollment and Maintenance   834   0600 QTY - Transaction Set Control Totals
Action	<b>Add Segment Note</b> Note #1: This is intended to submit the total number of members within the file.

CR 1163 Add notes to the QTY to clarify the values transmitted in the elements.

Location X333 | Benefit Enrollment and Maintenance | 834 | 0600  
QTY - Transaction Set Control Totals

Action **Add Data Element Code Note**  
to QTY01 code TO (Total):  
Use when quantifying the total number of Member Level Detail (2000 Loops) within the ST-SE.

CR 476 Clarify that the QTY02 quantity is a record count that may not represent the number of unique members in the transmission.

Location X333 | Benefit Enrollment and Maintenance | 834 | 0600  
QTY - Transaction Set Control Totals

Action **Add Data Element Code Note**  
to QTY01 code ET (Employee Total):  
Use when quantifying the total number of subscribers (INS01 = Y) within the ST-SE.

CR 476 Clarify that the QTY02 quantity is a record count that may not represent the number of unique members in the transmission.

Location X333 | Benefit Enrollment and Maintenance | 834 | 0600  
QTY - Transaction Set Control Totals

Action **Add Data Element Code Note**  
to QTY01 code DT (Dependent Total):  
Use when quantifying the total number of dependents (INS01 = N) within the ST-SE.

CR 476 Clarify that the QTY02 quantity is a record count that may not represent the number of unique members in the transmission.

Location X333 | Benefit Enrollment and Maintenance | 834 | 0600  
QTY - Transaction Set Control Totals

Action **Add Segment Note**  
#2:  
The QTY02 values, when QTY01 = ET plus when QTY01 = DT, equals the QTY02 value when QTY01 = TO.

Count values:  $QTY02 + QTY02 = QTY02$   
When  $QTY01 = ET + DT = TO$

CR 476 Clarify that the QTY02 quantity is a record count that may not represent the number of unique members in the transmission.

Location X333 | Benefit Enrollment and Maintenance | 834 | 0600  
QTY - Transaction Set Control Totals

Action	<b>Add Segment Note</b> #3: Since an individual member's record may be transmitted more than once within the ST-SE, the quantity in QTY02 when QTY01 = TO, does not necessarily reflect a count of unique member records.
CR 476	Clarify that the QTY02 quantity is a record count that may not represent the number of unique members in the transmission.

Location X333 | Benefit Enrollment and Maintenance | 834 | 0100 | 2000  
INS - Member Level Detail

Action	<b>Add Data Element Code Value</b> s to INS06-01: F - Medicare Part D G - Medicare Part A and D H - Medicare Part B and D I - Medicare Part A, B and D
CR 490	Add data element values to INS06-1 to describe Medicare coverage combinations.

Location X333 | Benefit Enrollment and Maintenance | 834 | 0100 | 2000  
INS - Member Level Detail

Action	<b>Add Data Element Code Value</b> to INS08: IA (Inactive)
CR 487	Add codes to INS08 and DTP01 to support inactive employee reporting.

Location X333 | Benefit Enrollment and Maintenance | 834 | 0100 | 2000  
INS - Member Level Detail

Action	<b>Modify Data Element Code Note</b> on INS02 code 23 (Sponsored Dependent): From Dependents age 19 and older; qualifications may vary depending on policy.  To Use when the dependent is age 26 or older; qualifications may vary depending on policy.
CR 1396	Revise the code value notes for consistency.

Location X333 | Benefit Enrollment and Maintenance | 834 | 0100 | 2000  
INS - Member Level Detail

Action	<b>Modify Data Element Code Note</b> on INS08 code FT (Full-time): From
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Full time active employee

To

Use when the subscriber is a full-time active employee.

CR 1396 Revise the code value notes for consistency.

Location X333 | Benefit Enrollment and Maintenance | 834 | 0100 | 2000  
INS - Member Level Detail

Action **Modify Data Element Code Note**

on INS08 code PT (Part-time):

From

Part time Active Employee

To

Use when the subscriber is a part-time active employee.

CR 1396 Revise the code value notes for consistency.

Location X333 | Benefit Enrollment and Maintenance | 834 | 0100 | 2000  
INS - Member Level Detail

Action **Add Data Element Code Note**

to INS08 code IA (Inactive):

Use when the subscriber has employer coverage but does not meet the definition of an active employee e.g. full-time, part-time, etc . For example this would be someone on long term disability who still has employer sponsored coverage.

CR 1396 Revise the code value notes for consistency.

Location X333 | Benefit Enrollment and Maintenance | 834 | 0100 | 2000  
INS - Member Level Detail

Action **Modify Data Element Situational Rule**

on INS09:

From

Required when describing a non-spouse dependent whose age requires a qualifying condition for enrollment (e.g., being an active student). See the Plan contract for details of the age requirements for student status usage. If not required by this implementation guide, do not send.

To

Required when describing a non-spouse dependent whose age requires a qualifying condition for enrollment (e.g., being an active student). If not required by this implementation guide, do not send.

CR 1541 Review the situational rules to ensure consistent formatting and wording, as applicable.

Location	X333   Benefit Enrollment and Maintenance   834   0100   2000 INS - Member Level Detail
Action	<p><b>Modify Data Element Situational Rule</b> on INS12:</p> <p>From Required if the subscriber/dependent is deceased. If not required by this implementation guide, do not send. This is the date of death for the subscriber/dependent and does not replace the use of the termination date within the 2300 loop.</p> <p>To Required when the Insured is known to be deceased. If not required by this implementation guide, do not send.</p>
CR 1541	Review the situational rules to ensure consistent formatting and wording, as applicable.
Location	X333   Benefit Enrollment and Maintenance   834   0100   2000 INS - Member Level Detail
Action	<p><b>Modify Data Element Situational Rule</b> on INS04:</p> <p>From Required when the payer needs to know the reason for the change. If not required by this implementation guide, do not send.</p> <p>To Required when the member maintenance reason is required when obligated by the insurance contract. If not required by this implementation guide, do not send.</p>
CR 1541	Review the situational rules to ensure consistent formatting and wording, as applicable.
Location	X333   Benefit Enrollment and Maintenance   834   0100   2000 INS - Member Level Detail
Action	<p><b>Modify Data Element Code Note</b> on INS02 code 38 (Collateral Dependent):</p> <p>From Relative related by blood or marriage who resides in the home and is dependent on the insured for a major portion of their support.</p> <p>To Use when the dependent is a relative related by blood or marriage who resides in the home and depends on the insured for a major portion of their support.</p>
CR 1396	Revise the code value notes for consistency.

Location	X333   Benefit Enrollment and Maintenance   834   0100   2000 INS - Member Level Detail
Action	<b>Modify Data Element Code Note</b> on INS02 code 53 (Life Partner): From This is a partner that acts like a spouse without a legal marriage committment.  To Use when indicating a partner that acts like a spouse without a legal marriage commitment.
CR 1396	Revise the code value notes for consistency.
Location	X333   Benefit Enrollment and Maintenance   834   0200   2000 REF - Member Supplemental Identifier
Action	<b>Modify Data Element Code Note</b> on REF01 code 23 (Client Number): From To be used to pass a payer specific identifier for a member. Not to be used after the HIPAA standard National Identifier for Individuals is implemented.  To Use when reporting a payer specific identifier for a member.
CR 1396	Revise the code value notes for consistency.
Location	X333   Benefit Enrollment and Maintenance   834   0250   2000 DTP - Member Level Dates
Action	<b>Add Data Element Code Value</b> Member Level Dates: DTP01: W02 (Status Change)
CR 487	Add codes to INS08 and DTP01 to support inactive employee reporting.
Location	X333   Benefit Enrollment and Maintenance   834   0250   2000 DTP - Member Level Dates
Action	<b>Modify Segment Repeat</b> : From 24 To 25
CR 487	Add codes to INS08 and DTP01 to support inactive employee reporting.
Location	X333   Benefit Enrollment and Maintenance   834   0250   2000 DTP - Member Level Dates
Action	<b>Add Data Element Code Note</b> to DTP01 Code W02 (Status Change): Use when a status is reported in the INS08 and an effective date of that



status is needed.

CR 487 Add codes to INS08 and DTP01 to support inactive employee reporting.

Location X333 | Benefit Enrollment and Maintenance | 834 | 0250 | 2000  
DTP - Member Level Dates

Action **Add Data Element Code Value**  
to DTP01:  
AEC (Medicare Part A Coverage Effective Date)

CR 1492 Need the capability to associate specific member-level dates and coverages (such as Part A or Part D) for enrollment purposes.

Location X333 | Benefit Enrollment and Maintenance | 834 | 0250 | 2000  
DTP - Member Level Dates

Action **Add Data Element Code Value**  
to DTP01:  
AEG (Medicare Part B Coverage Effective Date)

CR 1492 Need the capability to associate specific member-level dates and coverages (such as Part A or Part D) for enrollment purposes.

Location X333 | Benefit Enrollment and Maintenance | 834 | 0250 | 2000  
DTP - Member Level Dates

Action **Add Data Element Code Value**  
to DTP01:  
AFC (Medicare Part D Coverage Effective Date)

CR 1492 Need the capability to associate specific member-level dates and coverages (such as Part A or Part D) for enrollment purposes.

Location X333 | Benefit Enrollment and Maintenance | 834 | 0250 | 2000  
DTP - Member Level Dates

Action **Add Data Element Code Value**  
to DTP01:  
AED (Medicare Part A Coverage Termination Date)

CR 1492 Need the capability to associate specific member-level dates and coverages (such as Part A or Part D) for enrollment purposes.

Location X333 | Benefit Enrollment and Maintenance | 834 | 0250 | 2000  
DTP - Member Level Dates

Action **Add Data Element Code Value**  
to DTP01:  
AEH (Medicare Part B Coverage Termination Date)

CR 1492 Need the capability to associate specific member-level dates and coverages (such as Part A or Part D) for enrollment purposes.

Location	X333   Benefit Enrollment and Maintenance   834   0250   2000 DTP - Member Level Dates
Action	<b>Add Data Element Code Value</b> to DTP01: AFD (Medicare Part D Coverage Termination Date)
CR 1492	Need the capability to associate specific member-level dates and coverages (such as Part A or Part D) for enrollment purposes.
Location	X333   Benefit Enrollment and Maintenance   834   0250   2000 DTP - Member Level Dates
Action	<b>Add Data Element Code Note</b> To DTP01 Code 338 (Medicare Begin): Use for Medicare Part C (Medicare Advantage) Coverage Effective Date
CR 1492	Need the capability to associate specific member-level dates and coverages (such as Part A or Part D) for enrollment purposes.
Location	X333   Benefit Enrollment and Maintenance   834   0250   2000 DTP - Member Level Dates
Action	<b>Add Data Element Code Note</b> To DTP01 Code 339 (Medicare End): Use for Medicare Part C (Medicare Advantage) Coverage Termination Date
CR 1492	Need the capability to associate specific member-level dates and coverages (such as Part A or Part D) for enrollment purposes.
Location	X333   Benefit Enrollment and Maintenance   834   0250   2000 DTP - Member Level Dates
Action	<b>Modify Data Element Code Note</b> on DTP01 Code 357 (Eligibility End): From The eligibility end date represents the last date of coverage for which claims will be paid for the individual being terminated. For example, if a date of 02/28/2001 is passed then claims for this individual will be paid through 11:59 p.m. on 02/28/2001.  To Use when reporting the last date of coverage for which the member's claims will be paid. For example, if a date of 02/28/2014 is reported then claims for this member will be paid through 11:59 p.m. on 02/28/2014
CR 1396	Revise the code value notes for consistency.
Location	X333   Benefit Enrollment and Maintenance   834   0250   2000 DTP - Online Application Date/Time

Action	<b>Add Segment</b> DTP - Online/Application Date/Time
CR 1352	Add a date and time stamp indicating when the enrollee completed the application submission.
Location	X333   Benefit Enrollment and Maintenance   834   0300   2100A NM1 - Member Name
Action	<b>Modify Data Element Code Value</b> on NM108: From: ZZ (Mutually Defined)  To: II (Standard Unique Health Identifier for each Individual in the United States)
CR 1165	In NM108, replace the generic ZZ qualifier with the new specific qualifier II.
Location	X333   Benefit Enrollment and Maintenance   834   0300   2100A NM1 - Member Name
Action	<b>Add Data Element Code Value</b> to NM108: TI (Individual Taxpayer Identification Number (ITIN) )
CR 1428	Health plans in border states cover patients who do not have a SSN but have an identifier from another country, such as an ITIN (Individual Taxpayer Identification Number). NM109 should accommodate these members, requiring a new qualifier.
Location	X333   Benefit Enrollment and Maintenance   834   0300   2100A NM1 - Member Name
Action	<b>Modify Multiple Locations</b> Code Note From The Social Security Number must be a string of exactly nine numbers with no separators. For example, sending "111002222" would be valid, while sending "111-00-2222" would be invalid.  To Use when reporting a Social Security Number.  The Social Security Number must be a string of exactly nine numbers with no separators. For example, sending "111002222" would be valid, while sending "111-00-2222" would be invalid.
CR 1112	Remove the restriction on use of the Social Security Number in the 2100A Member Name NM108, as Federal Rules govern SSN use.

Location	X333   Benefit Enrollment and Maintenance   834   0300   2100A NM1 - Member Name
Action	<b>Modify Data Element Situational Rule</b> on NM108: From Required when the provider is mandated to obtain an National Provider ID or when an atypical provider has an alternate identification number that has been assigned by the payer.  To Required when NM109 is used. If not required by this implementation guide, do not send.
CR 1478	Remove duplication of situational rules between the element and the code qualifier across the TR3.
Location	X333   Benefit Enrollment and Maintenance   834   0400   2100A PER - Member Communications Numbers Contact Information
Action	<b>Add Segment Note</b> #2: Send communication information in the order of preference when contacting the member.
CR 1114	There is a need for more contact numbers than the TR3 currently supports. There also needs to be guidance for how to identify the preferred contact method. May need additional qualifiers for other contact methods such as text and an alternate contact not living in your household.
Location	X333   Benefit Enrollment and Maintenance   834   0400   2100A PER - Member Communications Numbers Contact Information
Action	<b>Modify Segment Repeat</b> : From 1 To 5
CR 1114	There is a need for more contact numbers than the TR3 currently supports. There also needs to be guidance for how to identify the preferred contact method. May need additional qualifiers for other contact methods such as text and an alternate contact not living in your household.
Location	X333   Benefit Enrollment and Maintenance   834   0400   2100A PER - Member Communications Numbers Contact Information
Action	<b>Add Data Element Code Value</b> To PER03: TS (Text Messaging Address) OT (Other Residential Telephone number ) EA (Internet Email Address)

WC (Work Cellular)  
 PC (Personal Cellular)  
 NP (Night Phone)  
 PP (Personal Phone)

CR 1114 There is a need for more contact numbers than the TR3 currently supports. There also needs to be guidance for how to identify the preferred contact method. May need additional qualifiers for other contact methods such as text and an alternate contact not living in your household.

Location X333 | Benefit Enrollment and Maintenance | 834 | 0400 | 2100A  
 PER - Member Communications Numbers Contact Information

Action **Add Data Element Code Value**  
 To PER05:  
 TS (Text Messaging Address)  
 OT (Other Residential Telephone number )  
 EA (Internet Email Address)  
 WC (Work Cellular)  
 PC (Personal Cellular)  
 NP (Night Phone)  
 PP (Personal Phone)

CR 1114 There is a need for more contact numbers than the TR3 currently supports. There also needs to be guidance for how to identify the preferred contact method. May need additional qualifiers for other contact methods such as text and an alternate contact not living in your household.

Location X333 | Benefit Enrollment and Maintenance | 834 | 0400 | 2100A  
 PER - Member Communications Numbers Contact Information

Action **Add Data Element Code Value**  
 To PER07:  
 TS (Text Messaging Address)  
 OT (Other Residential Telephone number )  
 EA (Internet Email Address)  
 WC (Work Cellular)  
 PC (Personal Cellular)  
 NP (Night Phone)  
 PP (Personal Phone)

CR 1114 There is a need for more contact numbers than the TR3 currently supports. There also needs to be guidance for how to identify the preferred contact method. May need additional qualifiers for other contact methods such as text and an alternate contact not living in your household.

Location X333 | Benefit Enrollment and Maintenance | 834 | 0400 | 2100A  
 PER - Member Communications Numbers Contact Information

Action	<b>Add Data Element Code Note</b> To PER03, PER05, PER07 code OT (Other Residential Telephone Number): Use when reporting a TTY communication number.
CR 1114	There is a need for more contact numbers than the TR3 currently supports. There also needs to be guidance for how to identify the preferred contact method. May need additional qualifiers for other contact methods such as text and an alternate contact not living in your household.
Location	X333   Benefit Enrollment and Maintenance   834   0400   2100A PER - Member Communications Numbers Contact Information
Action	<b>Add Data Element Code Note</b> To PER03, PER05, PER07 code EA (Internet Email Address): Use when reporting a secondary or alternate email address.
CR 1114	There is a need for more contact numbers than the TR3 currently supports. There also needs to be guidance for how to identify the preferred contact method. May need additional qualifiers for other contact methods such as text and an alternate contact not living in your household.
Location	X333   Benefit Enrollment and Maintenance   834   0400   2100A PER - Member Communications Numbers Contact Information
Action	<b>Add Data Element Code Note</b> To PER03, PER05, PER07 code AP (Alternate Telephone): Use when reporting the phone number for the individual's closest relative.
CR 1114	There is a need for more contact numbers than the TR3 currently supports. There also needs to be guidance for how to identify the preferred contact method. May need additional qualifiers for other contact methods such as text and an alternate contact not living in your household.
Location	X333   Benefit Enrollment and Maintenance   834   0400   2100A PER - Member Communications Numbers Contact Information
Action	<b>Add Data Element Code Note</b> To PER03, PER05, PER07 code TE (Telephone): Use when identifying the primary phone number.
CR 1114	There is a need for more contact numbers than the TR3 currently supports. There also needs to be guidance for how to identify the preferred contact method. May need additional qualifiers for other contact methods such as text and an alternate contact not living in your household.
Location	X333   Benefit Enrollment and Maintenance   834   0400   2100A PER - Member Communications Numbers Contact Information
Action	<b>Add Data Element Code Note</b> To PER03, PER05, PER07 code CP (Cellular Phone): Use when the cellular phone ownership is unknown.

CR 1114 There is a need for more contact numbers than the TR3 currently supports. There also needs to be guidance for how to identify the preferred contact method. May need additional qualifiers for other contact methods such as text and an alternate contact not living in your household.

Location X333 | Benefit Enrollment and Maintenance | 834 | 0500 | 2100A  
N3 - Member Address

Action **Modify Segment Situational Rule**

:

From

Required when enrolling subscribers, dependents with different address information, or when changing a member's address. If not required by this implementation guide, do not send.

To

Required when enrolling subscribers or when enrolling dependents with an address different from the subscribers or when changing a member's address. If not required by this implementation guide, do not send.

CR 1541 Review the situational rules to ensure consistent formatting and wording, as applicable.

Location X333 | Benefit Enrollment and Maintenance | 834 | 0500 | 2100A  
N3 - Member Address

Action **Modify Data Element Situational Rule**

on N302:

From

Required when a second address line is needed. If not required by this implementation guide, do not send.

To

Required when a second address line exists. If not required by this implementation guide, do not send.

CR 1541 Review the situational rules to ensure consistent formatting and wording, as applicable.

Location X333 | Benefit Enrollment and Maintenance | 834 | 0600 | 2100A  
N4 - Member City, State, ZIP Code

Action **Modify Segment Situational Rule**

:

From

Required when enrolling subscribers, dependents with different address information, or when changing a member's address. If not required by this implementation guide, do not send.

To

Required when enrolling subscribers or when enrolling dependents with an address different from the subscribers or when changing a member's address. If not required by this implementation guide, do not send.

CR 1541 Review the situational rules to ensure consistent formatting and wording, as applicable.

Location X333 | Benefit Enrollment and Maintenance | 834 | 0600 | 2100A  
N4 - Member City, State, ZIP Code

Action **Modify Data Element Situational Rule**

on N405:

From

Required when such transmission is required under the insurance contract between the sponsor and payer and allowed by federal and state regulations. If not required by this implementation guide, do not send.

To

Required when obligated by the insurance contract. If not required by this implementation guide, do not send.

CR 1541 Review the situational rules to ensure consistent formatting and wording, as applicable.

Location X333 | Benefit Enrollment and Maintenance | 834 | 0600 | 2100A  
N4 - Member City, State, ZIP Code

Action **Modify Data Element Situational Rule**

on N406:

From

Required when such transmission is required under the insurance contract between the sponsor and payer and allowed by federal and state regulations. If not required by this implementation guide, do not send.

To

Required when obligated by the insurance contract. If not required by this implementation guide, do not send.

CR 1541 Review the situational rules to ensure consistent formatting and wording, as applicable.

Location X333 | Benefit Enrollment and Maintenance | 834 | 0800 | 2100A  
DMG - Member Demographic Information

Action **Modify Data Element Usage**

of DMG05-01:

From Situational to Not Used.

Race and ethnicity is reported in DMG05-02 and DMG05-03.



CR 1335 Need to modify the race/ethnicity reporting in the 834 to support the OMB guidance. Refer to the requirements at [http://www.whitehouse.gov/omb/fedreg\\_1997standards/](http://www.whitehouse.gov/omb/fedreg_1997standards/).

Location X333 | Benefit Enrollment and Maintenance | 834 | 0800 | 2100A  
DMG - Member Demographic Information

Action **Modify Data Element Usage**  
of DMG05-02:  
From Situational to Required

CR 1335 Need to modify the race/ethnicity reporting in the 834 to support the OMB guidance. Refer to the requirements at [http://www.whitehouse.gov/omb/fedreg\\_1997standards/](http://www.whitehouse.gov/omb/fedreg_1997standards/).

Location X333 | Benefit Enrollment and Maintenance | 834 | 0800 | 2100A  
DMG - Member Demographic Information

Action **Modify Data Element Usage**  
of DMG05-03:  
From Situational to Required

CR 1335 Need to modify the race/ethnicity reporting in the 834 to support the OMB guidance. Refer to the requirements at [http://www.whitehouse.gov/omb/fedreg\\_1997standards/](http://www.whitehouse.gov/omb/fedreg_1997standards/).

Location X333 | Benefit Enrollment and Maintenance | 834 | 0800 | 2100A  
DMG - Member Demographic Information

Action **Modify Segment Situational Rule**  
:  
From  
Required when enrolling a new member, changing a member's demographic information, or terminating a member. If not required by this implementation guide, do not send.

To:  
Required when enrolling a new member, changing a member's demographic information, or terminating a member. If not required by this implementation guide, may be provided at the sender's discretion but cannot be required by the receiver.

CR 1541 Review the situational rules to ensure consistent formatting and wording, as applicable.

Location X333 | Benefit Enrollment and Maintenance | 834 | 0800 | 2100A  
DMG - Member Demographic Information

Action **Modify Data Element Situational Rule**  
on DMG05:

From

Required when such transmission is required under the insurance contract between the sponsor and payer and allowed by federal and state regulations. If not required by this implementation guide, do not send.

To

Required when obligated under the insurance contract and not restricted by federal or state regulations. If not required by this implementation guide, do not send.

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CR 1541 Review the situational rules to ensure consistent formatting and wording, as applicable.

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Location X333 | Benefit Enrollment and Maintenance | 834 | 0800 | 2100A  
DMG - Member Demographic Information

Action **Modify Data Element Situational Rule**

on DMG10:

From

Required when such transmission is required under the insurance contract between the sponsor and payer and allowed by federal and state regulations. If not required by this implementation guide, do not send.

To

Required when obligated under the insurance contract to specify how the Information in DMG05, including any repeats, was collected. If not required by this implementation guide, do not send.

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CR 1541 Review the situational rules to ensure consistent formatting and wording, as applicable.

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Location X333 | Benefit Enrollment and Maintenance | 834 | 0800 | 2100A  
DMG - Member Demographic Information

Action **Modify Data Element Situational Rule**

on DMG11:

From

Required when there is a need to specify how the information in DMG05, including any repeats, was collected. If not required by this implementation guide, do not send.

To

Required when obligated under the insurance contract to specify how the Information in DMG05, including any repeats, was collected. If not required by this implementation guide, do not send.

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CR 1541 Review the situational rules to ensure consistent formatting and wording, as applicable.

Location	X333   Benefit Enrollment and Maintenance   834   1100   2100A ICM - Member Income
Action	<b>Modify Segment Situational Rule</b> : From Required when such transmission is required under the insurance contract between the sponsor and payer. If not required by this implementation guide, do not send.  To Required when obligated by the insurance contract. If not required by this implementation guide, do not send.
CR 1541	Review the situational rules to ensure consistent formatting and wording, as applicable.
Location	X333   Benefit Enrollment and Maintenance   834   1100   2100A ICM - Member Income
Action	<b>Add Data Element Note</b> to ICM03: This is the maximum number of hours worked in one calendar week. Report 168 hours or less (24 hours/day x 7 days/week).
CR 1106	Modify the length of ICM03 for efficiency. Restricting elements to their logical maximum creates more efficient implementations.
Location	X333   Benefit Enrollment and Maintenance   834   1100   2100A ICM - Member Income
Action	<b>Add Data Element Note</b> to DE 782 (Monetary Amount):  The maximum length of this instance of data element 782 is 10.
CR 1013	Add a consistent element note explaining the maximum length to every monetary amount element.
Location	X333   Benefit Enrollment and Maintenance   834   1200   2100A AMT - Member Policy Amounts
Action	<b>Add Data Element Note</b> to DE 782 (Monetary Amount):  The maximum length of this instance of data element 782 is 10.
CR 1013	Add a consistent element note explaining the maximum length to every monetary amount element.

Location	X333   Benefit Enrollment and Maintenance   834   1300   2100A HLH - Member Health Information
Action	<b>Delete Data Element Code Value</b> from HLH01-01: X (Tobacco Use and Substance Abuse)
CR 1167	Add code values to HLH01-01 and a situational rule to HLH01-02.
Location	X333   Benefit Enrollment and Maintenance   834   1300   2100A HLH - Member Health Information
Action	<b>Add Data Element Situational Rule</b> to HLH01-01: Required on initial enrollment to report tobacco use, substance abuse or pregnancy status when the member's information is available. OR Required on an enrollment update to report a change in tobacco use, substance abuse or pregnancy status when the member's information is available. If not required by this implementation guide, do not send.
CR 1115	Add a pregnant indicator and the ability to indicate a changes in status between "No", "Yes", and "Unknown".
Location	X333   Benefit Enrollment and Maintenance   834   1300   2100A HLH - Member Health Information
Action	<b>Add Data Element Code Value</b> to HLH01-01: P (Pregnancy)
CR 1115	Add a pregnant indicator and the ability to indicate a changes in status between "No", "Yes", and "Unknown".
Location	X333   Benefit Enrollment and Maintenance   834   1300   2100A HLH - Member Health Information
Action	<b>Modify Data Element Situational Rule</b> on HLH01-02: From Required when an `S`, `T`, or `X` is sent in the health related code. If not required by this implementation guide, do not send. To Required when a `P`, `S`, `T`, or `X` is sent in the health related code. If not required by this implementation guide, do not send.
CR 1115	Add a pregnant indicator and the ability to indicate a changes in status between "No", "Yes", and "Unknown".

Location	X333   Benefit Enrollment and Maintenance   834   1300   2100A HLH - Member Health Information
Action	<b>Add Data Element Note</b> to HLH01-02: Use to report a health related condition is present, not present (N) or unknown.
CR 1115	Add a pregnant indicator and the ability to indicate a changes in status between "No", "Yes", and "Unknown".
Location	X333   Benefit Enrollment and Maintenance   834   1300   2100A HLH - Member Health Information
Action	<b>Add Data Element Code Value</b> to HLH01-03: 771 = Status W02 = Status Change ABC = Estimated Date of Birth
CR 1116	Smoking is a rating factor for many policies. Issuers who do not do their own applications need to know the dates someone stopped smoking or began smoking.
Location	X333   Benefit Enrollment and Maintenance   834   1300   2100A HLH - Member Health Information
Action	<b>Add Data Element Situational Rule</b> to HLH01-03: Required when a status effective date for tobacco use or substance abuse is available. Or Required when an estimated pregnancy due date is available. If not required, do not send.
CR 1116	Smoking is a rating factor for many policies. Issuers who do not do their own applications need to know the dates someone stopped smoking or began smoking.
Location	X333   Benefit Enrollment and Maintenance   834   1300   2100A HLH - Member Health Information
Action	<b>Add Data Element Situational Rule</b> to HLH01-04: Required when C061-03 is populated. If not required, do not send.
CR 1116	Smoking is a rating factor for many policies. Issuers who do not do their own applications need to know the dates someone stopped smoking or began smoking.

Location	X333   Benefit Enrollment and Maintenance   834   1300   2100A HLH - Member Health Information
Action	<b>Add Data Element Code Note</b> to HLH01-03 code 771 (Status): Use when reporting a tobacco use or substance abuse status for the first time.
CR 1116	Smoking is a rating factor for many policies. Issuers who do not do their own applications need to know the dates someone stopped smoking or began smoking.
Location	X333   Benefit Enrollment and Maintenance   834   1300   2100A HLH - Member Health Information
Action	<b>Add Data Element Code Note</b> to HLH01-03 code W02 (Status Change): Use when reporting a change in tobacco use or substance abuse status for the first time or when reporting a change of estimated date of birth.
CR 1116	Smoking is a rating factor for many policies. Issuers who do not do their own applications need to know the dates someone stopped smoking or began smoking.
Location	X333   Benefit Enrollment and Maintenance   834   1300   2100A HLH - Member Health Information
Action	<b>Add Data Element Code Note</b> to HLH01-03 code ABC (Estimated Date of Birth): Use when reporting the estimated date of birth for the first time.
CR 1116	Smoking is a rating factor for many policies. Issuers who do not do their own applications need to know the dates someone stopped smoking or began smoking.
Location	X333   Benefit Enrollment and Maintenance   834   1300   2100A HLH - Member Health Information
Action	<b>Modify Segment Situational Rule</b> : From Required on initial enrollment of a member when appropriate medical information about the member is available. If not required by this implementation guide, do not send.  To Required on initial enrollment of a member when appropriate medical information about the member is available Or Required on an enrollment update when a member's medical information has

changed and is available.

If not required by this implementation guide, do not send.

CR 1117 Revise the HLH Situational Rule to allow transmission during an enrollment period.

Location X333 | Benefit Enrollment and Maintenance | 834 | 1300 | 2100A  
HLH - Member Health Information

Action **Modify Data Element Usage**  
on HLH01:  
From Required to Situational

CR 1117 Revise the HLH Situational Rule to allow transmission during an enrollment period.

Location X333 | Benefit Enrollment and Maintenance | 834 | 1300 | 2100A  
HLH - Member Health Information

Action **Add Data Element Situational Rule**  
to HLH01:  
Required on initial enrollment to report tobacco use, substance abuse or pregnancy status when the member's information is available.  
OR  
Required on an enrollment update to report tobacco use, substance abuse or pregnancy status when member's information is available.  
If not required by this implementation guide, do not send.

CR 1117 Revise the HLH Situational Rule to allow transmission during an enrollment period.

Location X333 | Benefit Enrollment and Maintenance | 834 | 1500 | 2100A  
LUI - Member Language

Action **Modify Segment Situational Rule**  
:  
From  
Required if the sponsor knows that the member's primary language is not English, and such transmission is required under the insurance contract between the sponsor and payer and allowed by federal and state regulations.  
If not required by this implementation guide do not send.  
  
To  
Required when the sponsor collects the member's preferred language, and is legally allowed to share it. If not required by this implementation guide do not send.

CR 1459 Remove the English default presumption, add a qualifier for Unknown, and require accurate reporting of the member's language.

Location	X333   Benefit Enrollment and Maintenance   834   1500   2100A LUI - Member Language
Action	<b>Modify Segment Note</b> : From Any need to send/collect this information will need to be contained in the trading partner agreement  To Any need to collect this information will be due to a requirement external to the transaction (e.g. Trading partner agreement, legal requirement, program requirement).
CR 1459	Remove the English default presumption, add a qualifier for Unknown, and require accurate reporting of the member's language.
Location	X333   Benefit Enrollment and Maintenance   834   0300   2100B NM1 - Incorrect Member Name
Action	<b>Modify Data Element Code Value</b> on NM108: From: ZZ (Mutually Defined)  To: II (Standard Unique Health Identifier for each Individual in the United States)
CR 1165	In NM108, replace the generic ZZ qualifier with the new specific qualifier II.
Location	X333   Benefit Enrollment and Maintenance   834   0300   2100B NM1 - Incorrect Member Name
Action	<b>Modify Data Element Usage</b> on NM103: From Required to Situational
CR 478	Change the usage for 2100B NM103 to situational.
Location	X333   Benefit Enrollment and Maintenance   834   0300   2100B NM1 - Incorrect Member Name
Action	<b>Add Data Element Situational Rule</b> to NM103: Required when a corrected last name is submitted in Loop 2100A (Member Name). If not required by this implementation guide, do not send.
CR 478	Change the usage for 2100B NM103 to situational.
Location	X333   Benefit Enrollment and Maintenance   834   0300   2100B NM1 - Incorrect Member Name



Action	<p><b>Modify Data Element Industry Name</b> on NM109: From Prior Incorrect Insured Identifier</p> <p>To Prior Incorrect Member Identifier</p>
CR 1107	Change the implementation name of 2100B NM1 to "Prior Incorrect Member" for consistency.

Location X333 | Benefit Enrollment and Maintenance | 834 | 0300 | 2100B  
NM1 - Incorrect Member Name

Action	<p><b>Modify Multiple Locations</b> Code Note From The Social Security Number must be a string of exactly nine numbers with no separators. For example, sending "111002222" would be valid, while sending "111-00-2222" would be invalid.</p> <p>To Use when reporting a Social Security Number.</p> <p>The Social Security Number must be a string of exactly nine numbers with no separators. For example, sending "111002222" would be valid, while sending "111-00-2222" would be invalid.</p>
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CR 1112 Remove the restriction on use of the Social Security Number in the 2100A Member Name NM108, as Federal Rules govern SSN use.

Location X333 | Benefit Enrollment and Maintenance | 834 | 0300 | 2100B  
NM1 - Incorrect Member Name

Action	<p><b>Modify Data Element Situational Rule</b> on NM104 From Required when NM102 is equal to "1" (person) and the person has a first name. If not required by this implementation guide, do not send.</p> <p>To Required when a corrected first name is submitted in Loop 2100A (Member Name). If not required by this implementation guide, do not send.</p>
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CR 478 Change the usage for 2100B NM103 to situational.

Location X333 | Benefit Enrollment and Maintenance | 834 | 0300 | 2100B  
NM1 - Incorrect Member Name

Action	<p><b>Modify Data Element Situational Rule</b> on NM105 From Required if supplied by member. If not required by this implementation guide, do not send.</p> <p>To Required when a corrected middle name is submitted in Loop 2100A (Member Name). If not required by this implementation guide, do not send.</p>
CR 478	Change the usage for 2100B NM103 to situational.
Location	X333   Benefit Enrollment and Maintenance   834   0300   2100B NM1 - Incorrect Member Name
Action	<p><b>Modify Data Element Situational Rule</b> on NM106 From Required if supplied by member. If not required by this implementation guide, do not send.</p> <p>To Required when a corrected name prefix is submitted in Loop 2100A (Member Name). If not required by this implementation guide, do not send.</p>
CR 478	Change the usage for 2100B NM103 to situational.
Location	X333   Benefit Enrollment and Maintenance   834   0300   2100B NM1 - Incorrect Member Name
Action	<p><b>Modify Data Element Situational Rule</b> on NM107 From Required if supplied by member. If not required by this implementation guide, do not send.</p> <p>To Required when a corrected name suffix is submitted in Loop 2100A (Member Name). If not required by this implementation guide, do not send.</p>
CR 478	Change the usage for 2100B NM103 to situational.
Location	X333   Benefit Enrollment and Maintenance   834   0800   2100B DMG - Incorrect Member Demographic Information
Action	<p><b>Modify Data Element Situational Rule</b> on DMG11: From: Required when the member's Race or Ethnicity is being corrected. If not required by this implementation guide, do not send.</p>

To:

Required when the member's Race or Ethnicity Collection Code is being corrected. If not required by this implementation guide, do not send.

CR 1153 Clarify the intended use and instructions for the reassociation of dollars and data.

Location X333 | Benefit Enrollment and Maintenance | 834 | 0800 | 2100B  
DMG - Incorrect Member Demographic Information

Action **Modify Data Element Usage**  
of DMG05-01:  
From Situational to Not Used.  
Race and ethnicity is reported in DMG05-02 and DMG05-03.

CR 1335 Need to modify the race/ethnicity reporting in the 834 to support the OMB guidance. Refer to the requirements at [http://www.whitehouse.gov/omb/fedreg\\_1997standards/](http://www.whitehouse.gov/omb/fedreg_1997standards/).

Location X333 | Benefit Enrollment and Maintenance | 834 | 0800 | 2100B  
DMG - Incorrect Member Demographic Information

Action **Modify Data Element Usage**  
of DMG05-02:  
From Situational to Required.

CR 1335 Need to modify the race/ethnicity reporting in the 834 to support the OMB guidance. Refer to the requirements at [http://www.whitehouse.gov/omb/fedreg\\_1997standards/](http://www.whitehouse.gov/omb/fedreg_1997standards/).

Location X333 | Benefit Enrollment and Maintenance | 834 | 0800 | 2100B  
DMG - Incorrect Member Demographic Information

Action **Modify Data Element Usage**  
of DMG05-03:  
From Situational to Required.

CR 1335 Need to modify the race/ethnicity reporting in the 834 to support the OMB guidance. Refer to the requirements at [http://www.whitehouse.gov/omb/fedreg\\_1997standards/](http://www.whitehouse.gov/omb/fedreg_1997standards/).

Location X333 | Benefit Enrollment and Maintenance | 834 | 0500 | 2100C  
N3 - Member Mail Address

Action **Modify Data Element Situational Rule**  
on N302:  
From  
Required when a second address line is needed. If not required by this implementation guide, do not send.

To  
Required when a second address line exists. If not required by this implementation guide, do not send.

CR 1541 Review the situational rules to ensure consistent formatting and wording, as applicable.

Location X333 | Benefit Enrollment and Maintenance | 834 | 0300 | 2100D  
NM1 - Member Employer

Action **Modify Data Element Situational Rule**  
on NM108:  
From  
Required when the provider is mandated to obtain an National Provider ID or when an atypical provider has an alternate identification number that has been assigned by the payer.

To  
Required when NM109 is used. If not required by this implementation guide, do not send.

CR 1478 Remove duplication of situational rules between the element and the code qualifier across the TR3.

Location X333 | Benefit Enrollment and Maintenance | 834 | 0500 | 2100D  
N3 - Member Employer Address

Action **Modify Data Element Situational Rule**  
on N302:  
From  
Required when a second address line is needed. If not required by this implementation guide, do not send.

To  
Required when a second address line exists. If not required by this implementation guide, do not send.

CR 1541 Review the situational rules to ensure consistent formatting and wording, as applicable.

Location X333 | Benefit Enrollment and Maintenance | 834 | 0400 | 2100E  
PER - Member School Communications Numbers Contact Information

Action **Add Segment Note**  
#2:  
Send communication information in the order of preference when contacting the member.

CR 1114 There is a need for more contact numbers than the TR3 currently supports. There also needs to be guidance for how to identify the preferred contact

method. May need additional qualifiers for other contact methods such as text and an alternate contact not living in your household.

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Location X333 | Benefit Enrollment and Maintenance | 834 | 0500 | 2100E  
N3 - Member School Address

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Action **Modify Data Element Situational Rule**  
on N302:  
From  
Required when a second address line is needed. If not required by this implementation guide, do not send.

To  
Required when a second address line exists. If not required by this implementation guide, do not send.

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CR 1541 Review the situational rules to ensure consistent formatting and wording, as applicable.

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Location X333 | Benefit Enrollment and Maintenance | 834 | 0300 | 2100F  
NM1 - Custodial Parent

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Action **Modify Data Element Code Value**  
on NM108:  
From:  
ZZ (Mutually Defined)

To:  
II (Standard Unique Health Identifier for each Individual in the United States)

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CR 1165 In NM108, replace the generic ZZ qualifier with the new specific qualifier II.

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Location X333 | Benefit Enrollment and Maintenance | 834 | 0300 | 2100F  
NM1 - Custodial Parent

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Action **Modify Data Element Usage**  
on NM104:  
From Required to Situational

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CR 1113 Change 2100F - Custodial Parent First Name (NM104) to situational for consistency.

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Location X333 | Benefit Enrollment and Maintenance | 834 | 0300 | 2100F  
NM1 - Custodial Parent

---

Action **Add Data Element Situational Rule**  
to NM104:  
Required when NM102 is equal to "1" (person) and the person has a first name. If not required by this implementation guide, do not send.

CR 1113 Change 2100F - Custodial Parent First Name (NM104) to situational for consistency.

Location X333 | Benefit Enrollment and Maintenance | 834 | 0300 | 2100F  
NM1 - Custodial Parent

Action **Modify Multiple Locations**

Code Note

From

The Social Security Number must be a string of exactly nine numbers with no separators. For example, sending "111002222" would be valid, while sending "111-00-2222" would be invalid.

To

Use when reporting a Social Security Number.

The Social Security Number must be a string of exactly nine numbers with no separators. For example, sending "111002222" would be valid, while sending "111-00-2222" would be invalid.

CR 1112 Remove the restriction on use of the Social Security Number in the 2100A Member Name NM108, as Federal Rules govern SSN use.

Location X333 | Benefit Enrollment and Maintenance | 834 | 0300 | 2100F  
NM1 - Custodial Parent

Action **Modify Data Element Situational Rule**

on NM108:

From

Required when the provider is mandated to obtain an National Provider ID or when an atypical provider has an alternate identification number that has been assigned by the payer.

To

Required when NM109 is used. If not required by this implementation guide, do not send.

CR 1478 Remove duplication of situational rules between the element and the code qualifier across the TR3.

Location X333 | Benefit Enrollment and Maintenance | 834 | 0400 | 2100F  
PER - Custodial Parent Communications Numbers Contact Information

Action **Add Segment Note**

#2:

Send communication information in the order of preference when contacting the member.

CR 1114 There is a need for more contact numbers than the TR3 currently supports. There also needs to be guidance for how to identify the preferred contact method. May need additional qualifiers for other contact methods such as text and an alternate contact not living in your household.

Location X333 | Benefit Enrollment and Maintenance | 834 | 0400 | 2100F  
PER - Custodial Parent Communications Numbers Contact Information

Action **Modify Segment Repeat**  
:  
From 1 To 5

CR 1114 There is a need for more contact numbers than the TR3 currently supports. There also needs to be guidance for how to identify the preferred contact method. May need additional qualifiers for other contact methods such as text and an alternate contact not living in your household.

Location X333 | Benefit Enrollment and Maintenance | 834 | 0400 | 2100F  
PER - Custodial Parent Communications Numbers Contact Information

Action **Add Data Element Code Value**  
To PER03:  
TS (Text Messaging Address)  
OT (Other Residential Telephone number )  
EA (Internet Email Address)  
WC (Work Cellular)  
PC (Personal Cellular)  
NP (Night Phone)  
PP (Personal Phone)

CR 1114 There is a need for more contact numbers than the TR3 currently supports. There also needs to be guidance for how to identify the preferred contact method. May need additional qualifiers for other contact methods such as text and an alternate contact not living in your household.

Location X333 | Benefit Enrollment and Maintenance | 834 | 0400 | 2100F  
PER - Custodial Parent Communications Numbers Contact Information

Action **Add Data Element Code Value**  
To PER05:  
TS (Text Messaging Address)  
OT (Other Residential Telephone number )  
EA (Internet Email Address)  
WC (Work Cellular)  
PC (Personal Cellular)  
NP (Night Phone)  
PP (Personal Phone)

CR 1114 There is a need for more contact numbers than the TR3 currently supports. There also needs to be guidance for how to identify the preferred contact method. May need additional qualifiers for other contact methods such as text and an alternate contact not living in your household.

Location X333 | Benefit Enrollment and Maintenance | 834 | 0400 | 2100F  
PER - Custodial Parent Communications Numbers Contact Information

Action **Add Data Element Code Value**  
To PER07:  
TS (Text Messaging Address)  
OT (Other Residential Telephone number )  
EA (Internet Email Address)  
WC (Work Cellular)  
PC (Personal Cellular)  
NP (Night Phone)  
PP (Personal Phone)

CR 1114 There is a need for more contact numbers than the TR3 currently supports. There also needs to be guidance for how to identify the preferred contact method. May need additional qualifiers for other contact methods such as text and an alternate contact not living in your household.

Location X333 | Benefit Enrollment and Maintenance | 834 | 0400 | 2100F  
PER - Custodial Parent Communications Numbers Contact Information

Action **Add Data Element Code Note**  
To PER03, PER05, PER07 code OT (Other Residential Telephone Number):  
Use when reporting a TTY communication number.

CR 1114 There is a need for more contact numbers than the TR3 currently supports. There also needs to be guidance for how to identify the preferred contact method. May need additional qualifiers for other contact methods such as text and an alternate contact not living in your household.

Location X333 | Benefit Enrollment and Maintenance | 834 | 0400 | 2100F  
PER - Custodial Parent Communications Numbers Contact Information

Action **Add Data Element Code Note**  
To PER03, PER05, PER07 code EA (Internet Email Address):  
Use when reporting a secondary or alternate email address.

CR 1114 There is a need for more contact numbers than the TR3 currently supports. There also needs to be guidance for how to identify the preferred contact method. May need additional qualifiers for other contact methods such as text and an alternate contact not living in your household.

Location X333 | Benefit Enrollment and Maintenance | 834 | 0400 | 2100F  
PER - Custodial Parent Communications Numbers Contact Information



Action	<b>Add Data Element Code Note</b> To PER03, PER05, PER07 code AP (Alternate Telephone): Use when reporting the phone number for the individual's closest relative.
CR 1114	There is a need for more contact numbers than the TR3 currently supports. There also needs to be guidance for how to identify the preferred contact method. May need additional qualifiers for other contact methods such as text and an alternate contact not living in your household.
Location	X333   Benefit Enrollment and Maintenance   834   0400   2100F PER - Custodial Parent Communications Numbers Contact Information
Action	<b>Add Data Element Code Note</b> To PER03, PER05, PER07 code TE (Telephone): Use when identifying the primary phone number.
CR 1114	There is a need for more contact numbers than the TR3 currently supports. There also needs to be guidance for how to identify the preferred contact method. May need additional qualifiers for other contact methods such as text and an alternate contact not living in your household.
Location	X333   Benefit Enrollment and Maintenance   834   0400   2100F PER - Custodial Parent Communications Numbers Contact Information
Action	<b>Add Data Element Code Note</b> To PER03, PER05, PER07 code CP (Cellular Phone): Use when the cellular phone ownership is unknown.
CR 1114	There is a need for more contact numbers than the TR3 currently supports. There also needs to be guidance for how to identify the preferred contact method. May need additional qualifiers for other contact methods such as text and an alternate contact not living in your household.
Location	X333   Benefit Enrollment and Maintenance   834   0500   2100F N3 - Custodial Parent Address
Action	<b>Modify Data Element Situational Rule</b> on N302: From Required when a second address line is needed. If not required by this implementation guide, do not send.  To Required when a second address line exists. If not required by this implementation guide, do not send.
CR 1541	Review the situational rules to ensure consistent formatting and wording, as applicable.

Location	X333   Benefit Enrollment and Maintenance   834   0300   2100G NM1 - Responsible Person
Action	<p><b>Modify Data Element Code Value</b> on NM108: From: ZZ (Mutually Defined)</p> <p>To: II (Standard Unique Health Identifier for each Individual in the United States)</p>
CR 1165	In NM108, replace the generic ZZ qualifier with the new specific qualifier II.
Location	X333   Benefit Enrollment and Maintenance   834   0300   2100G NM1 - Responsible Person
Action	<p><b>Modify Data Element Code Note</b> on code E1 (Person or Other Entity Legally Responsible for a Child): From Used to identify a legal indemnity situation.</p> <p>This code is used when a Qualified Medical Child Support Order (QMSCO) is present.</p> <p>To Use when a Qualified Medical Child Support Order (QMSCO) is present. Explanation: Identifies a legal indemnification situation.</p>
CR 1396	Revise the code value notes for consistency.
Location	X333   Benefit Enrollment and Maintenance   834   0300   2100G NM1 - Responsible Person
Action	<p><b>Modify Multiple Locations</b> Code Note From The Social Security Number must be a string of exactly nine numbers with no separators. For example, sending "111002222" would be valid, while sending "111-00-2222" would be invalid.</p> <p>To Use when reporting a Social Security Number.</p> <p>The Social Security Number must be a string of exactly nine numbers with no separators. For example, sending "111002222" would be valid, while sending "111-00-2222" would be invalid.</p>
CR 1112	Remove the restriction on use of the Social Security Number in the 2100A Member Name NM108, as Federal Rules govern SSN use.

Location	X333   Benefit Enrollment and Maintenance   834   0300   2100G NM1 - Responsible Person
Action	<b>Modify Data Element Situational Rule</b> on NM108: From Required when the provider is mandated to obtain an National Provider ID or when an atypical provider has an alternate identification number that has been assigned by the payer.  To Required when NM109 is used. If not required by this implementation guide, do not send.
CR 1478	Remove duplication of situational rules between the element and the code qualifier across the TR3.
Location	X333   Benefit Enrollment and Maintenance   834   0400   2100G PER - Responsible Person Communications Numbers Contact Information
Action	<b>Add Segment Note</b> : Send communication information in the order of preference when contacting the member.
CR 1114	There is a need for more contact numbers than the TR3 currently supports. There also needs to be guidance for how to identify the preferred contact method. May need additional qualifiers for other contact methods such as text and an alternate contact not living in your household.
Location	X333   Benefit Enrollment and Maintenance   834   0400   2100G PER - Responsible Person Communications Numbers Contact Information
Action	<b>Modify Segment Repeat</b> : From 1 To 5
CR 1114	There is a need for more contact numbers than the TR3 currently supports. There also needs to be guidance for how to identify the preferred contact method. May need additional qualifiers for other contact methods such as text and an alternate contact not living in your household.
Location	X333   Benefit Enrollment and Maintenance   834   0400   2100G PER - Responsible Person Communications Numbers Contact Information
Action	<b>Add Data Element Code Value</b> To PER03: TS (Text Messaging Address) OT (Other Residential Telephone number ) EA (Internet Email Address)

WC (Work Cellular)  
 PC (Personal Cellular)  
 NP (Night Phone)  
 PP (Personal Phone)

CR 1114 There is a need for more contact numbers than the TR3 currently supports. There also needs to be guidance for how to identify the preferred contact method. May need additional qualifiers for other contact methods such as text and an alternate contact not living in your household.

Location X333 | Benefit Enrollment and Maintenance | 834 | 0400 | 2100G  
 PER - Responsible Person Communications Numbers Contact Information

Action **Add Data Element Code Value**  
 To PER05:  
 TS (Text Messaging Address)  
 OT (Other Residential Telephone number )  
 EA (Internet Email Address)  
 WC (Work Cellular)  
 PC (Personal Cellular)  
 NP (Night Phone)  
 PP (Personal Phone)

CR 1114 There is a need for more contact numbers than the TR3 currently supports. There also needs to be guidance for how to identify the preferred contact method. May need additional qualifiers for other contact methods such as text and an alternate contact not living in your household.

Location X333 | Benefit Enrollment and Maintenance | 834 | 0400 | 2100G  
 PER - Responsible Person Communications Numbers Contact Information

Action **Add Data Element Code Value**  
 To PER07:  
 TS (Text Messaging Address)  
 OT (Other Residential Telephone number )  
 EA (Internet Email Address)  
 WC (Work Cellular)  
 PC (Personal Cellular)  
 NP (Night Phone)  
 PP (Personal Phone)

CR 1114 There is a need for more contact numbers than the TR3 currently supports. There also needs to be guidance for how to identify the preferred contact method. May need additional qualifiers for other contact methods such as text and an alternate contact not living in your household.

Location X333 | Benefit Enrollment and Maintenance | 834 | 0400 | 2100G  
 PER - Responsible Person Communications Numbers Contact Information

Action	<b>Add Data Element Code Note</b> To PER03, PER05, PER07 code OT (Other Residential Telephone Number): Use when reporting a TTY communication number.
CR 1114	There is a need for more contact numbers than the TR3 currently supports. There also needs to be guidance for how to identify the preferred contact method. May need additional qualifiers for other contact methods such as text and an alternate contact not living in your household.
Location	X333   Benefit Enrollment and Maintenance   834   0400   2100G PER - Responsible Person Communications Numbers Contact Information
Action	<b>Add Data Element Code Note</b> To PER03, PER05, PER07 code EA (Internet Email Address): Use when reporting a secondary or alternate email address.
CR 1114	There is a need for more contact numbers than the TR3 currently supports. There also needs to be guidance for how to identify the preferred contact method. May need additional qualifiers for other contact methods such as text and an alternate contact not living in your household.
Location	X333   Benefit Enrollment and Maintenance   834   0400   2100G PER - Responsible Person Communications Numbers Contact Information
Action	<b>Add Data Element Code Note</b> To PER03, PER05, PER07 code AP (Alternate Telephone): Use when reporting the phone number for the individual's closest relative.
CR 1114	There is a need for more contact numbers than the TR3 currently supports. There also needs to be guidance for how to identify the preferred contact method. May need additional qualifiers for other contact methods such as text and an alternate contact not living in your household.
Location	X333   Benefit Enrollment and Maintenance   834   0400   2100G PER - Responsible Person Communications Numbers Contact Information
Action	<b>Add Data Element Code Note</b> To PER03, PER05, PER07 code TE (Telephone): Use when identifying the primary phone number.
CR 1114	There is a need for more contact numbers than the TR3 currently supports. There also needs to be guidance for how to identify the preferred contact method. May need additional qualifiers for other contact methods such as text and an alternate contact not living in your household.
Location	X333   Benefit Enrollment and Maintenance   834   0400   2100G PER - Responsible Person Communications Numbers Contact Information
Action	<b>Add Data Element Code Note</b> To PER03, PER05, PER07 code CP (Cellular Phone): Use when the cellular phone ownership is unknown.

CR 1114 There is a need for more contact numbers than the TR3 currently supports. There also needs to be guidance for how to identify the preferred contact method. May need additional qualifiers for other contact methods such as text and an alternate contact not living in your household.

Location X333 | Benefit Enrollment and Maintenance | 834 | 0500 | 2100G  
N3 - Responsible Person Address

Action **Modify Data Element Situational Rule**  
on N302:  
From  
Required when a second address line is needed. If not required by this implementation guide, do not send.

To  
Required when a second address line exists. If not required by this implementation guide, do not send.

CR 1541 Review the situational rules to ensure consistent formatting and wording, as applicable.

Location X333 | Benefit Enrollment and Maintenance | 834 | 0300 | 2100H  
NM1 - Drop Off Location

Action **Modify Data Element Usage**  
on NM103, NM104, NM105, NM106 and NM107:  
From Situational to Not Used

CR 1171 NM103 through NM107 should be changed from situational to not used.

Location X333 | Benefit Enrollment and Maintenance | 834 | 0500 | 2100H  
N3 - Drop Off Location Address

Action **Modify Data Element Situational Rule**  
on N302:  
From  
Required when a second address line is needed. If not required by this implementation guide, do not send.

To  
Required when a second address line exists. If not required by this implementation guide, do not send.

CR 1541 Review the situational rules to ensure consistent formatting and wording, as applicable.

Location X333 | Benefit Enrollment and Maintenance | 834 | 2000 | 2200  
DSB - Disability Information

Action	<b>Modify Data Element Code Value</b> on DSB07: From: ZZ (Mutually Defined)  To: DC (International Classification of Diseases, 10th Revision, Clinical Modification (ICD-10-CM))
CR 1165	In NM108, replace the generic ZZ qualifier with the new specific qualifier II.
Location	X333   Benefit Enrollment and Maintenance   834   2000   2200 DSB - Disability Information
Action	<b>Modify Data Element Situational Rule</b> on DSB08: From Required when called for in the insurance contract between the sponsor and payer and allowed by federal and state regulations. If not required by this implementation guide, do not send. To Required when obligated by the insurance contract. If not required by this implementation guide, do not send.
CR 1541	Review the situational rules to ensure consistent formatting and wording, as applicable.
Location	X333   Benefit Enrollment and Maintenance   834   2600   2300 HD - Health Coverage
Action	<b>Add Data Element Code Value</b> to HD02: All INS04 code values added to align these data elements.
CR 1379	Change the usage, notes, and code values of HD02 for consistency across TR3s.
Location	X333   Benefit Enrollment and Maintenance   834   2600   2300 HD - Health Coverage
Action	<b>Add Data Element Code Value</b> to HD03: CDV (Combined Dental and Vision)
CR 1453	An additional code is required in HD03 for ancillary products that do not required the same level of member identification as other health care products.
Location	X333   Benefit Enrollment and Maintenance   834   2600   2300 HD - Health Coverage

Action	<b>Add Data Element Code Value</b> to HD03: COM (Combined insurance lines other than dental and vision)
CR 1453	An additional code is required in HD03 for ancillary products that do not required the same level of member identification as other health care products.
Location	X333   Benefit Enrollment and Maintenance   834   2600   2300 HD - Health Coverage
Action	<b>Add Data Element Code Note</b> to HD03 code COM (Combined insurance lines other than dental and vision): Use when identifying combined insurance lines other than dental and vision that are not QHP Products
CR 1453	An additional code is required in HD03 for ancillary products that do not required the same level of member identification as other health care products.
Location	X333   Benefit Enrollment and Maintenance   834   2600   2300 HD - Health Coverage
Action	<b>Add Data Element Code Note</b> on HD02 code XN (Notification Only): Use when sending a complete enrollment transmission, for the full file audit. Required when HD01 is equal to 030 (Audit or Compare).
CR 1396	Revise the code value notes for consistency.
Location	X333   Benefit Enrollment and Maintenance   834   2600   2300 HD - Health Coverage
Action	<b>Modify Data Element Situational Rule</b> on HD09: From Required when there is a need to designate a member as a late enrollee. If not required by this implementation guide, do not send.  To Required when obligated by the insurance contract. If not required by this implementation guide, do not send.
CR 1541	Review the situational rules to ensure consistent formatting and wording, as applicable.
Location	X333   Benefit Enrollment and Maintenance   834   2600   2300 HD - Health Coverage



Action	<b>Modify Data Element Usage</b> on HD02: From Not Used to Situational
CR 1379	Change the usage, notes, and code values of HD02 for consistency across TR3s.
Location	X333   Benefit Enrollment and Maintenance   834   2600   2300 HD - Health Coverage
Action	<b>Modify Data Element Situational Rule</b> on HD05: From Required when called for in the insurance contract between the sponsor and payer and allowed by federal and state regulations. If not required by this implementation guide, do not send. To Required when obligated by the insurance contract. If not required by this implementation guide, do not send.
CR 1541	Review the situational rules to ensure consistent formatting and wording, as applicable.
Location	X333   Benefit Enrollment and Maintenance   834   2600   2300 HD - Health Coverage
Action	<b>Modify Data Element Situational Rule</b> on HD04: From Required when additional information is needed to describe the exact type of coverage being provided. If not required by this implementation guide, do not send.  To Required when additional information is needed to describe the exact type of coverage. If not required by this implementation guide, do not send.
CR 1541	Review the situational rules to ensure consistent formatting and wording, as applicable.
Location	X333   Benefit Enrollment and Maintenance   834   2600   2300 HD - Health Coverage
Action	<b>Add Data Element Situational Rule</b> on HD02: Required when the member maintenance reason is required when obligated by the insurance contract. If not required by this implementation guide, do not send.

CR 1541 Review the situational rules to ensure consistent formatting and wording, as applicable.

Location X333 | Benefit Enrollment and Maintenance | 834 | 2600 | 2300  
HD - Health Coverage

Action **Modify Data Element Code Note**  
to HD01 code 032 (Employee Information Not Applicable):  
From  
Certain situations, such as military duty and CHAMPUS/TRICARE, classify the subscriber as ineligible for coverage or benefits. However, dependents of the subscribers are still eligible for coverage or benefits under the subscriber. Subscriber identifying elements are needed to accurately identify dependents.

To  
Use when dependents of an ineligible subscriber are eligible for coverage.

Explanation: Certain situations, such as military duty and CHAMPUS/TRICARE, classify the subscriber as ineligible for coverage or benefits. However, dependents of the subscribers are still eligible for coverage or benefits under the subscriber. Subscriber identifying elements are needed to accurately identify dependents.

CR 1396 Revise the code value notes for consistency.

Location X333 | Benefit Enrollment and Maintenance | 834 | 2600 | 2300  
HD - Health Coverage

Action **Modify Data Element Code Note**  
on HD03 code HLT (Health):  
From  
Includes both hospital and professional coverage.

To  
Use when reporting hospital or professional coverage.

CR 1396 Revise the code value notes for consistency.

Location X333 | Benefit Enrollment and Maintenance | 834 | 2600 | 2300  
HD - Health Coverage

Action **Modify Data Element Code Note**  
on HD05 code E1D (Employee and One Dependent):  
From  
For this code, the dependent is a non-spouse dependent. This code is not used for identification of Employee and Spouse. See code ESP.

To:  
Use when the dependent is a non-spouse dependent.

CR 1396 Revise the code value notes for consistency.

Location X333 | Benefit Enrollment and Maintenance | 834 | 2700 | 2300  
DTP - Health Coverage Dates

Action **Modify Data Element Code Note**  
on DTP01 code 695 (Previous Period):  
From  
This value is only to be used when reporting Previous Coverage Months.  
  
To  
Use when DTP01 is equal to 695 - Previous Period.

CR 1396 Revise the code value notes for consistency.

Location X333 | Benefit Enrollment and Maintenance | 834 | 2700 | 2300  
DTP - Health Coverage Dates

Action **Add Data Element Code Value**  
to DTP01:  
606 (Certification Period Start)

CR 1555 Add a Certification Date DTP segment in Loop 2300 so the payer knows how long the member is currently eligible to be in the program.

Location X333 | Benefit Enrollment and Maintenance | 834 | 2700 | 2300  
DTP - Health Coverage Dates

Action **Modify Segment Repeat**  
:  
From 6 to 8

CR 1555 Add a Certification Date DTP segment in Loop 2300 so the payer knows how long the member is currently eligible to be in the program.

Location X333 | Benefit Enrollment and Maintenance | 834 | 2700 | 2300  
DTP - Health Coverage Dates

Action **Add Data Element Code Note**  
on DTP01 code 606 (Certification Period Start):  
Use when reporting the member's date of certification or qualification for the coverage being sent in Loop 2300. Benefit Begin Date is reported using code value 348. Certification Period Start and Benefit Begin Date may or may not be the same.

CR 1555 Add a Certification Date DTP segment in Loop 2300 so the payer knows how long the member is currently eligible to be in the program.

Location X333 | Benefit Enrollment and Maintenance | 834 | 2700 | 2300  
DTP - Online Application Date/Time

Action	<b>Add Segment</b> DTP - Online/Application Date/Time segment
CR 1352	Add a date and time stamp indicating when the enrollee completed the application submission.
Location	X333   Benefit Enrollment and Maintenance   834   2800   2300 AMT - Health Coverage Policy Amount
Action	<b>Modify Segment Repeat</b> : From 9 to 3
CR 1168	Review the number of qualifiers and the number of repeats and revise if necessary.
Location	X333   Benefit Enrollment and Maintenance   834   2800   2300 AMT - Health Coverage Policy Amount
Action	<b>Modify Segment Situational Rule</b> : From Required when such transmission is required under the insurance contract between the sponsor and the payer. If not required by this implementation guide, do not send.  To Required when obligated by the insurance contract. If not required by this implementation guide, do not send.
CR 1541	Review the situational rules to ensure consistent formatting and wording, as applicable.
Location	X333   Benefit Enrollment and Maintenance   834   2800   2300 AMT - Health Coverage Policy Amount
Action	<b>Add Data Element Note</b> to DE 782 (Monetary Amount):  The maximum length of this instance of data element 782 is 10.
CR 1013	Add a consistent element note explaining the maximum length to every monetary amount element.
Location	X333   Benefit Enrollment and Maintenance   834   2900   2300 REF - Health Coverage Policy Number
Action	<b>Modify Segment Repeat</b> : From 14 to 4

CR 1168 Review the number of qualifiers and the number of repeats and revise if necessary.

Location X333 | Benefit Enrollment and Maintenance | 834 | 2900 | 2300  
REF - Prior Coverage Months

Action **Modify Data Element Code Note**  
on REF01 code QQ (Unit Number):  
From  
This code is used in this implementation guide to indicate that the value in REF02 is the response required under the portability provisions of HIPAA.  
  
To  
Use when required to indicate the number of months of prior health coverage under the portability provisions of HIPAA.

CR 1396 Revise the code value notes for consistency.

Location X333 | Benefit Enrollment and Maintenance | 834 | 2900 | 2300  
REF - Prior Coverage Months

Action **Modify Segment Situational Rule**  
:  
From  
Required when the portability provisions of the Health Insurance Portability and Accountability Act require reporting of the number of months of prior health coverage that meet the certification requirements of the Act.  
  
To  
Required when there are prior months of health coverage that meet the certification requirements of the portability provisions within the Health Insurance Portability and Accountability Act. If not required by this implementation guide, do not send.

CR 1541 Review the situational rules to ensure consistent formatting and wording, as applicable.

Location X333 | Benefit Enrollment and Maintenance | 834 | 3000 | 2300  
IDC - Identification Card

Action **Modify Segment Situational Rule**  
:  
From  
Required when requesting the production of an identification card as the result of an enrollment add, change, or statement. If not required by this implementation guide, do not send.  
  
To  
Required when requesting the production of an identification card. If not

required by this implementation guide, do not send.

CR 1541 Review the situational rules to ensure consistent formatting and wording, as applicable.

Location X333 | Benefit Enrollment and Maintenance | 834 | 3200 | 2310  
NM1 - Provider Name

Action **Delete Data Element Code Value**  
Provider Name: NM108: Deleted Codes:  
34 (Social Security Number)  
FI (Federal Taxpayer's Identification Number)

CR 1169 2310 NM1: The NPI is mandated, remove other qualifiers.

Location X333 | Benefit Enrollment and Maintenance | 834 | 3200 | 2310  
NM1 - Provider Name

Action **Modify Data Element Situational Rule**  
on NM108:  
From  
Required when the provider is mandated to obtain an National Provider ID or when an atypical provider has an alternate identification number that has been assigned by the payer.

To  
Required when NM109 is used. If not required by this implementation guide, do not send.

CR 1478 Remove duplication of situational rules between the element and the code qualifier across the TR3.

Location X333 | Benefit Enrollment and Maintenance | 834 | 3500 | 2310  
N3 - Provider Address

Action **Modify Segment Repeat**  
:  
From 2 to 1

CR 1172 Only one provider address (2310 N3) is needed.

Location X333 | Benefit Enrollment and Maintenance | 834 | 3500 | 2310  
N3 - Provider Address

Action **Modify Data Element Situational Rule**  
on N302:  
From  
Required when a second address line is needed. If not required by this implementation guide, do not send.

To

Required when a second address line exists. If not required by this implementation guide, do not send.

CR 1541 Review the situational rules to ensure consistent formatting and wording, as applicable.

Location X333 | Benefit Enrollment and Maintenance | 834 | 3700 | 2310  
PER - Provider Communications Numbers Contact Information

Action **Add Segment Note**  
#2:  
Send communication information in the order of preference when contacting the member.

CR 1114 There is a need for more contact numbers than the TR3 currently supports. There also needs to be guidance for how to identify the preferred contact method. May need additional qualifiers for other contact methods such as text and an alternate contact not living in your household.

Location X333 | Benefit Enrollment and Maintenance | 834 | 4000 | 2320  
COB - Coordination of Benefits

Action **Modify Loop Repeat**  
:  
From 5 to 10

CR 1168 Review the number of qualifiers and the number of repeats and revise if necessary.

Location X333 | Benefit Enrollment and Maintenance | 834 | 4000 | 2320  
COB - Coordination of Benefits

Action **Modify Segment Situational Rule**  
:  
From  
Required whenever an individual has another insurance plan with benefits similar to those covered by the insurance product specified in the HD segment for this occurrence of Loop ID-2300. If not required by this implementation guide, do not send.

To  
Required when an individual has another insurance plan with benefits similar to those covered by the insurance product specified in this occurrence of Loop ID-2300. If not required by this implementation guide, do not send.

CR 1541 Review the situational rules to ensure consistent formatting and wording, as applicable.

Location X333 | Benefit Enrollment and Maintenance | 834 | 4000 | 2320  
COB - Coordination of Benefits

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Action **Modify Data Element Situational Rule**  
 on COB04:  
 From  
 Required when detailed COB coverage information is agreed to be exchanged. If not required by this implementation guide, do not send.

To  
 Required when detailed COB coverage information is obligated to be provided by the insurance contract. If not required by this implementation guide, do not send.

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CR 1541 Review the situational rules to ensure consistent formatting and wording, as applicable.

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Location X333 | Benefit Enrollment and Maintenance | 834 | 4070 | 2320  
 DTP - Coordination of Benefits Eligibility Dates

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Action **Modify Segment Situational Rule**  
 :  
 From  
 Required when the submitter needs to send effective dates for coordination of benefits. If not required by this implementation guide, do not send.

To  
 Required when the submitter needs to send effective dates for coordination of benefits. If not required by this implementation guide, may be provided by the sender's discretion but cannot be required by the receiver.

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CR 1541 Review the situational rules to ensure consistent formatting and wording, as applicable.

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Location X333 | Benefit Enrollment and Maintenance | 834 | 4100 | 2330  
 NM1 - Coordination of Benefits Related Entity

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Action **Modify Segment Situational Rule**  
 :  
 From  
 Required to send the name of the insurance company when provided to the sponsor. If not required by this implementation guide, do not send.

To  
 Required when information identifying the related insurance company is provided to the sponsor. If not required by this implementation guide, do not send.

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CR 1541 Review the situational rules to ensure consistent formatting and wording, as applicable.

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Location	X333   Benefit Enrollment and Maintenance   834   4100   2330 NM1 - Coordination of Benefits Related Entity
Action	<p><b>Modify Data Element Situational Rule</b> on NM103:</p> <p>From Required to send the insurance company name if no standard identifier is available to pass in NM109. If not required by this implementation guide, do not send.</p> <p>To Required when no standard identifier is available in NM109. If not required by this implementation guide, do not send.</p>
CR 1541	Review the situational rules to ensure consistent formatting and wording, as applicable.
Location	X333   Benefit Enrollment and Maintenance   834   4100   2330 NM1 - Coordination of Benefits Related Entity
Action	<p><b>Modify Data Element Situational Rule</b> on NM108:</p> <p>From Required when the provider is mandated to obtain a National Provider ID or when an atypical provider has an alternate identification number that has been assigned by the payer.</p> <p>To Required when NM109 is used. If not required by this implementation guide, do not send.</p>
CR 1478	Remove duplication of situational rules between the element and the code qualifier across the TR3.
Location	X333   Benefit Enrollment and Maintenance   834   4300   2330 N3 - Coordination of Benefits Related Entity Address
Action	<p><b>Modify Data Element Situational Rule</b> on N302:</p> <p>From Required when a second address line is needed. If not required by this implementation guide, do not send.</p> <p>To Required when a second address line exists. If not required by this implementation guide, do not send.</p>
CR 1541	Review the situational rules to ensure consistent formatting and wording, as applicable.

Location	X333   Benefit Enrollment and Maintenance   834   4300   2330 N3 - Coordination of Benefits Related Entity Address
Action	<p><b>Modify Segment Situational Rule</b></p> <p>:</p> <p>From Required when detailed COB coverage information is agreed to be exchanged. If not required by this implementation guide, do not send.</p> <p>To Required when detailed COB coverage information is obligated to be provided by the insurance contract. If not required by this implementation guide, do not send.</p>
CR 1541	Review the situational rules to ensure consistent formatting and wording, as applicable.
Location	X333   Benefit Enrollment and Maintenance   834   4400   2330 N4 - Coordination of Benefits Other Insurance Company City, State, ZIP Code
Action	<p><b>Modify Segment Situational Rule</b></p> <p>:</p> <p>From Required when detailed COB coverage information is agreed to be exchanged. If not required by this implementation guide, do not send.</p> <p>To Required when detailed COB coverage information is obligated to be provided by the insurance contract. If not required by this implementation guide, do not send.</p>
CR 1541	Review the situational rules to ensure consistent formatting and wording, as applicable.
Location	X333   Benefit Enrollment and Maintenance   834   4500   2330 PER - Administrative Communications Contact Information
Action	<p><b>Modify Segment Situational Rule</b></p> <p>:</p> <p>From Required when detailed COB coverage information is agreed to be exchanged. If not required by this implementation guide, do not send.</p> <p>To Required when detailed COB coverage information is obligated to be provided by the insurance contract. If not required by this implementation guide, do not send.</p>
CR 1541	Review the situational rules to ensure consistent formatting and wording, as applicable.

Location	X333   Benefit Enrollment and Maintenance   834   5500   2500 FSA - Tax Advantage Account
Action	<b>Add Loop</b> 2500 Tax Advantage Account
CR 1170	Tax Advantage Account information is required with enrollments. Suggest adding a new loop with the necessary information.
Location	X333   Benefit Enrollment and Maintenance   834   5600   2500 AMT - Tax Advantage Account Amount
Action	<b>Add Data Element Note</b> to DE 782 (Monetary Amount):  The maximum length of this instance of data element 782 is 10.
CR 1013	Add a consistent element note explaining the maximum length to every monetary amount element.
Location	X333   Benefit Enrollment and Maintenance   834   6882   2750 N1 - Reporting Category
Action	<b>Modify Segment Usage</b> : From Situational to Required
CR 1407	Change the usage of the 2750 loop N1 (position 180) and REF (position 181) segments to required to align with the underlying standard.
Location	X333   Benefit Enrollment and Maintenance   834   6882   2750 N1 - Reporting Category
Action	<b>Add Segment Note</b> #1: Use to specify the name of the reporting category of the member's participating entity.
CR 1407	Change the usage of the 2750 loop N1 (position 180) and REF (position 181) segments to required to align with the underlying standard.
Location	X333   Benefit Enrollment and Maintenance   834   6883   2750 REF - Reporting Category Reference
Action	<b>Modify Segment Usage</b> : From Situational to Required
CR 1407	Change the usage of the 2750 loop N1 (position 180) and REF (position 181) segments to required to align with the underlying standard.
Location	X333   Benefit Enrollment and Maintenance   834   6883   2750 REF - Reporting Category Reference

Action	<b>Add Segment Note</b> #1: Used to specify the reference identifier associated with the reporting category of the member's participating entity.
CR 1407	Change the usage of the 2750 loop N1 (position 180) and REF (position 181) segments to required to align with the underlying standard.
Location	X333   Benefit Enrollment and Maintenance   834   6884   2750 DTP - Reporting Category Date
Action	<b>Modify Segment Situational Rule</b> : From Required when called for in the insurance contract between the sponsor and payer. If not required by this implementation guide, do not send.  To Required when obligated by the insurance contract. If not required by this implementation guide, do not send.
CR 1541	Review the situational rules to ensure consistent formatting and wording, as applicable.