

CMS Improved Data Sharing: Impacts to Territory and State Beneficiary Query File (TBQ) and Enrollment Database (EDB) State File Exchanges

Frequently Asked Questions

1. Data Files

1.1. What is the EDB State File Exchange?

The Medicare Enrollment Database (EDB) State File Exchange is a query process that CMS offers to states and territories under which the state/territory submits a “finder file” of beneficiaries for query. CMS then issues a “response file,” which includes Medicare Parts A and B eligibility and enrollment data on the queried beneficiaries. States and territories may query CMS daily for Medicare beneficiary eligibility determination.

1.2. What is the TBQ File?

The Territory Beneficiary Query (TBQ) File is a query process that CMS offers to states and territories under which the state/territory submits a “finder file” of beneficiaries for query. CMS then issues a “response file,” which includes Medicare Parts A, B, C, and D eligibility and enrollment data on the queried beneficiaries. The Medicare data included in the TBQ Response File is pulled from the same database as the CMS Medicare Modernization Act (MMA) Response File but on an ad hoc basis. States and territories may query CMS daily for Medicare beneficiary eligibility determination.

1.3. How are the data in the EDB State File Exchange and TBQ File different?

Both the EDB State File Exchange and TBQ File are data queries of a CMS database for beneficiary eligibility and enrollment data. These files query different databases, however: The EDB State File Exchange queries the CMS EDB, while the TBQ File queries the CMS Medicare Beneficiary Database (MBD). EDB State File Exchange data are limited to only Medicare Parts A and B data and beneficiary demographics data. Meanwhile, the TBQ File contains Medicare Parts A, B, C, and D data; demographics data; and a robust amount of additional entitlement data (listed in the Medicare Advantage Prescription Drug State User Guide). Currently, there is a size limit to the TBQ finder file; the EDB State File Exchange does not have such a limit.

1.4. What is the difference between a TBQ Request File and TBQ Response File?

A TBQ Request File represents a data exchange between CMS and the states. To determine beneficiary eligibility and enrollment information as part of the process for Low-Income Subsidy (LIS) enrollment, participating states request information from the CMS MBD through the TBQ Request File. TBQ Request Files contain the names, addresses, and demographic information of beneficiaries whose records were submitted through MMA files. CMS validates the incoming TBQ Request File and notifies the state of acceptance or rejection of the file based on the match between information in the TBQ Request File and MBD records. If the file is rejected, no further action is taken. If the file is accepted, MBD sends a TBQ Response File containing beneficiary names, residence addresses, demographic information, and the latest entitlement information for each TBQ Request File.

2. Retiring the EDB State File Exchange and Transitioning to the TBQ File

2.1. When will CMS retire the EDB State File Exchange?

The EDB State File Exchange will be retired on June 30, 2022.

2.2. When can my state transition off the EDB State File Exchange?

Your state can start the transition process, now! Please contact the CMS resource mailbox at CMSEDBRetirement@cms.hhs.gov for assistance.

2.3. How can I start the process of transitioning from the EDB State File Exchange to the TBQ File?

Please contact the resource mailbox at CMSEDBRetirement@cms.hhs.gov for assistance with transitioning to the TBQ File.

2.4. Why is CMS retiring the EDB State File Exchange?

CMS is modernizing our data systems. As part of these modernization efforts, CMS will reduce redundancies between the EDB State File Exchange and the TBQ File by retiring the EDB State File Exchange. Additionally, CMS modernization efforts to the TBQ File include a cloud-based platform, unlimited record count queries, and optional API data exchange.

2.5. How can I find out if my state uses the EDB State File Exchange or the TBQ File and, if so, who has access to the file(s)?

Please contact the CMS resource mailbox at CMSEDBRetirement@cms.hhs.gov for assistance regarding what files your state receives and the current data file contacts.

2.6. My state uses only the TBQ File; do I need to make any changes to our TBQ File process?

No, you do not need to take any action. Your state's exchange of TBQ File data will continue uninterrupted.

2.7. Who should I contact with questions about the TBQ File data?

Please contact the State Data Resource Center (SDRC) at SDRC@EconometricalInc.com or (877) 657-9889 with questions regarding the data you receive.

2.8. Who should I contact with issues transmitting and/or receiving TBQ Files?

Please contact the Medicare Advantage Prescription Drug (MAPD) Help Desk at MAPDHelp@cms.hhs.gov or (800) 927-8069 if you have issues with TBQ File transmission.

3. Data Sharing Agreements

3.1. What data sharing agreements govern the EDB State File Exchange and/or the TBQ File?

States sign an Information Exchange Agreement (IEA) and an accompanying Data Request and Attestation (DRA) form with CMS for certain Medicare data, including the EDB State File

Exchange and the TBQ File. You can download copies of these agreements on the SDRC Data Sharing Agreement web page.

3.2. Who should I contact with questions regarding my state's EDB State File Exchange or TBQ File data sharing agreements?

Please contact SDRC at SDRC@Econometricalnc.com or (877) 657-9889 with questions regarding your state's data sharing agreements.