From: CAC Questions <cacquestions@cms.hhs.gov>
Sent: Tuesday, July 14, 2026 11:01 AM
Subject: Important Updates: Complex Case Web Form Enhancements



Introducing Enhancements to the Complex Case Web Form

The Centers for Medicare & Medicaid Services (CMS) is excited to announce enhancements to the Complex Case Web Form. These updates modernize the form, improve navigation and layout, streamline data entry, and provide immediate access to user resources, including the Complex Case Web Form User Guide and microlearning module. Together, these updates support Assisters in submitting complete and accurate complex cases more efficiently.

Improved User Experience and Navigation

The enhanced Complex Case Web Form offers a more intuitive and seamless experience through several new features.

User Resources Available In-Form

The Complex Case Web Form User Guide and microlearning module are now accessible on every page via the **User Resources** dropdown. Users can quickly access guidance relevant to the page they're working on.

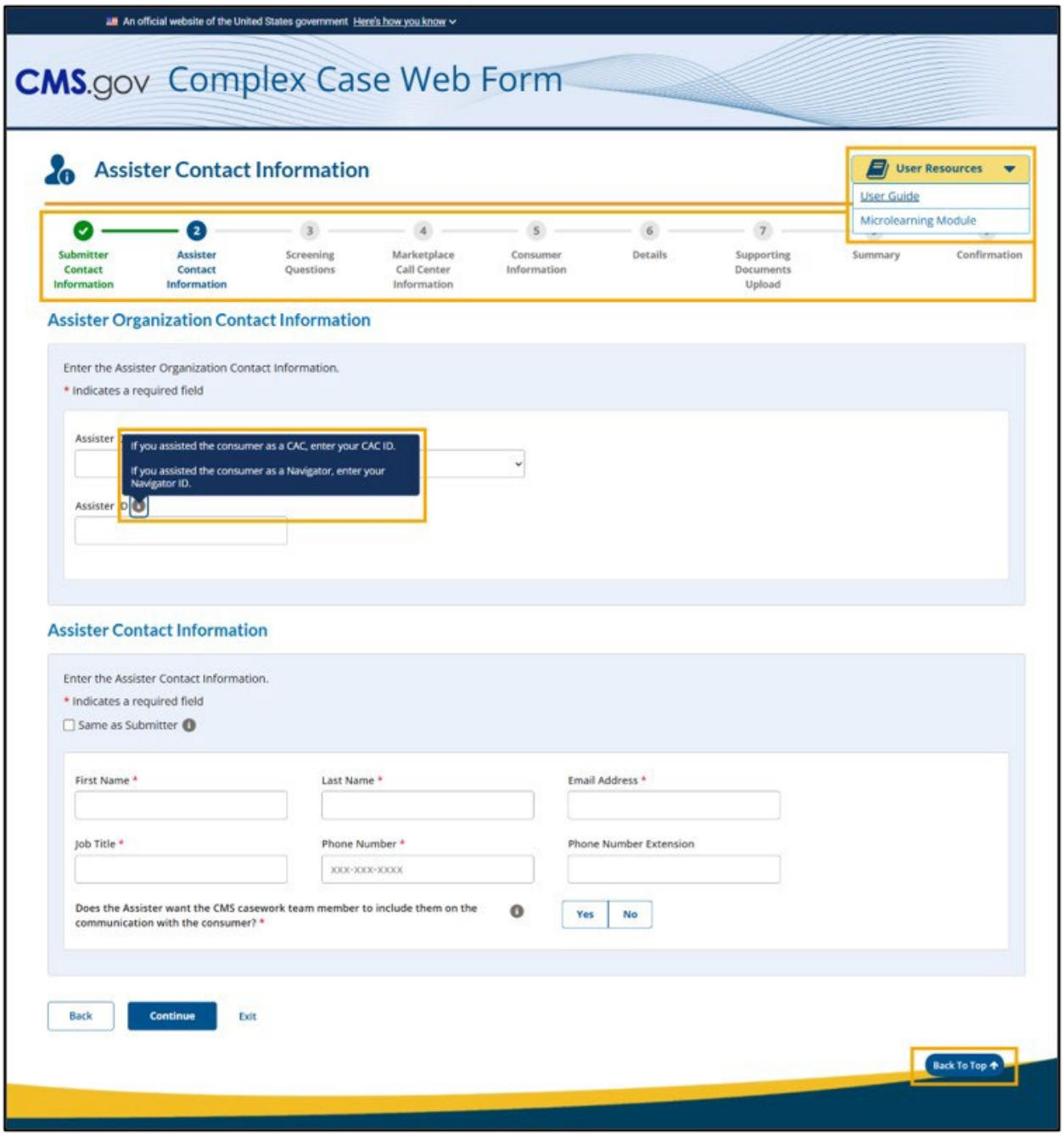
Progress Bar

A new progress bar at the top of each page shows your status throughout the submission process:

- Your current step appears as a blue numbered circle.
- Completed steps display as green circles with check marks.
- Steps not yet started appear as gray numbered circles.

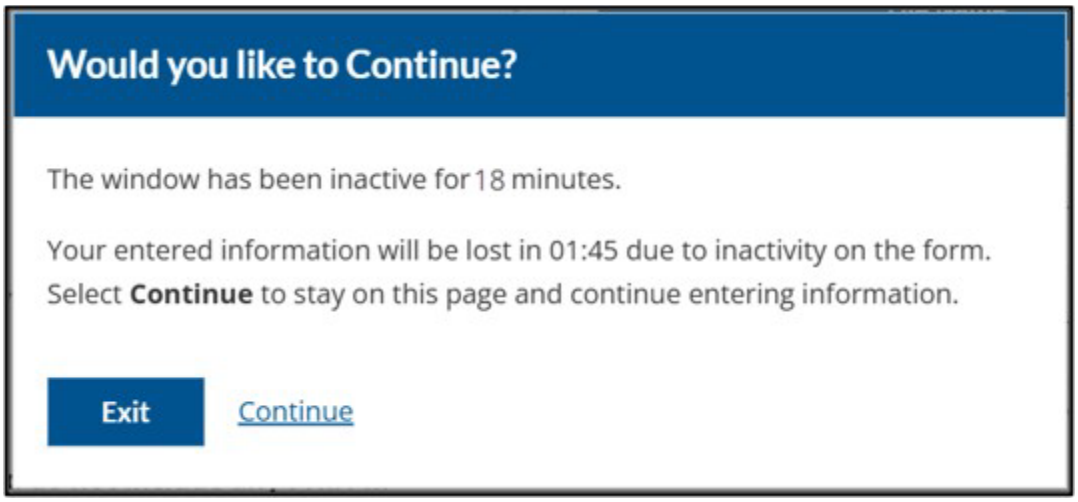
Enhanced Information Icons

Fields requiring additional explanation now include **Information** icons. Selecting an icon opens a tooltip with guidance to help you complete the field correctly, avoid common errors, and ensure you do not include Personally Identifiable Information (PII) or Protected Health Information (PHI).



Stronger Security Measures

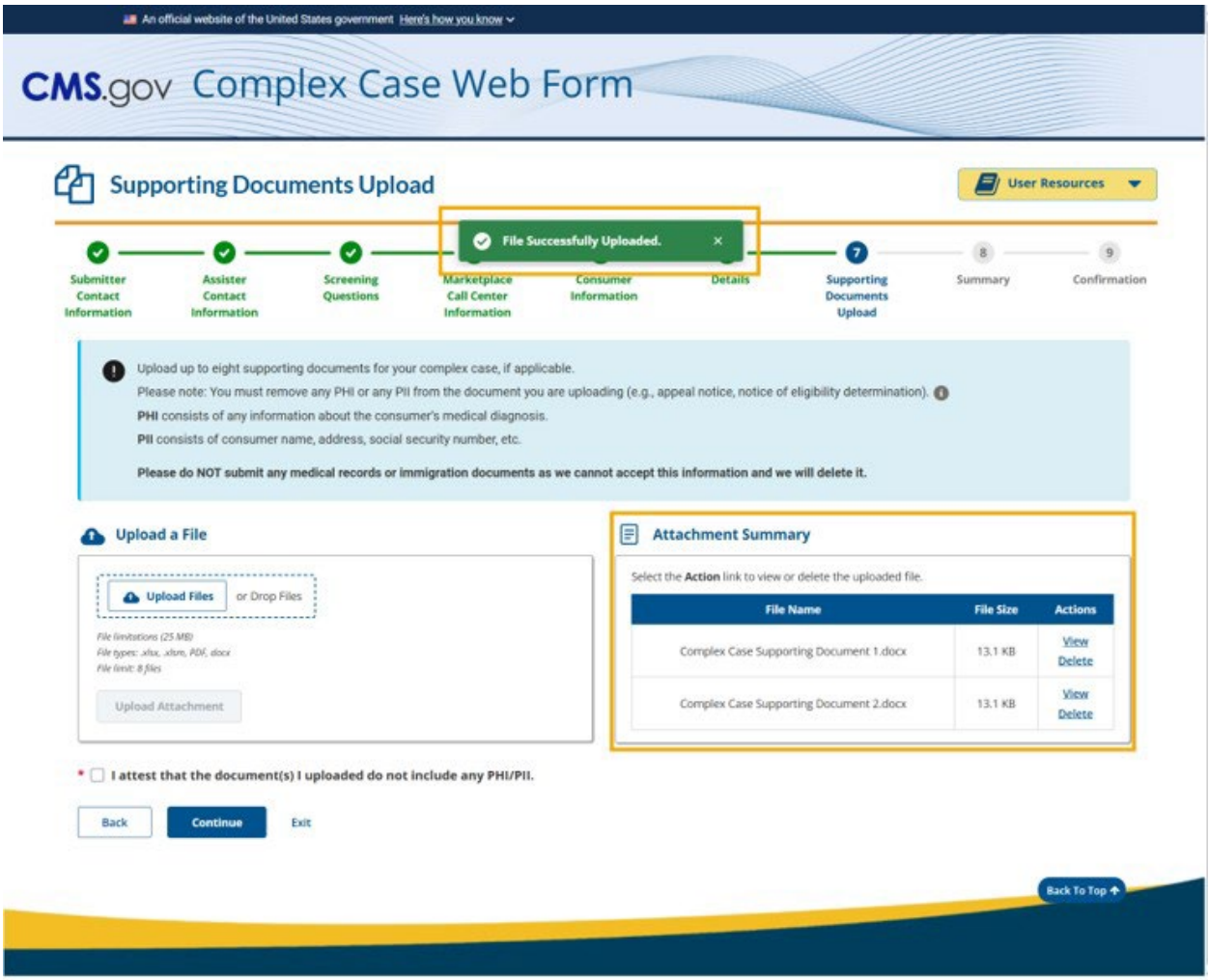
The web form now times out after 20 minutes of inactivity. At 18 minutes, a System Timeout modal will appear with a two-minute countdown. If the countdown expires, all information entered will be permanently lost and cannot be recovered.



Improved Supporting Documents Upload

Supporting document uploads are now easier to track and manage:

- Users are able to upload up to eight supporting files (previously capped at five).
- After uploading, an Attachment Summary table displays each file's name and size, along with options to view and delete individual documents.



Submit Another Case

The **Submit Another Case** feature streamlines workflow for Assisters who need to submit multiple cases. After submitting a case, select **Submit Another Case** on the "Confirmation" page to begin a new submission using the same submitter and Assister information. The web form automatically returns you to the "Screening Questions" page, allowing you to begin a new case without re-entering your details.

Remember:

Before submitting a complex case:

- Review the Complex Case Web Form User Guide and Complex Case microlearning module.
- Ensure you have all required information before starting.
- Do not enter or upload any PII or PHI.
- Inform the consumer that a caseworker will call them from an 855 number.

You can access the Complex Case Web Form directly or through the **Complex Case Web Form** tile on the Assister Support Hub.

If you have any questions about the complex case submission process or a complex case, email us at CACQuestions@cms.hhs.gov (Certified Application Counselors) or FFMAssisterCommunity@cms.hhs.gov (Navigators) or contact the Assister Support Team at 844-497-2123.

Thank you,

Marketplace Assister Support Team
Center for Consumer Information & Insurance Oversight (CCIIO)
Centers for Medicare & Medicaid Services
U.S. Department of Health & Human Services



Msg-01887758