

# Change Summary

## PBM Data Submission Guide v4.0 and v5.0

The changes between version 4.0 and 5.0 of the PBM’s data submission guides (DSG) are indicated in red in the table below.

Type of change	Template	Version 3.0	Version 4.0
<b>Update Definition:</b> Calendar Year		“Current year” means calendar year 2022.	“Current year” means the reporting period, calendar year 2023.
<b>Update Definition:</b> Prior year		“Prior Year” means calendar year 2022.	“Prior Year” means previous reporting period, calendar year 2023.
File Specifications		Appropriately formatted files can also be generated via Microsoft Excel by saving a spreadsheet in CSV format. This will remove many of the features included in Excel, such as formatting, formulas, and “sheets”, so you may want to save a copy in Excel format for your own reference in the future. We recommend using Microsoft Excel 2016 or earlier for the submission guide templates. Using Microsoft Excel 2019 or Microsoft 365 can cause formatting issues when saving as a CSV file and result in errors.	Appropriately formatted files can also be generated via Microsoft Excel by saving a spreadsheet in CSV format. This will remove many of the features included in Excel, such as formatting, formulas, and “sheets”, so you may want to save a copy in Excel format for your own reference in the future. We recommend using Microsoft Excel 2016 or earlier for the submission guide templates.
<b>Update:</b> Table Specifications	PBM Appeals	The submission of this report for this reporting year is due on March 1, 2024 and should include data for calendar year 2022.	The submission of this report for this reporting year is due on March 1, 2025 and should include data for calendar year 2023.
<b>Update Field:</b> Year		Name: Year Type: Numeric Format: 0000 Max Length: 4 digits Min Length: 4 digits Rule: greater than or equal to 2022	Name: Year Type: Numeric Format: 0000 Max Length: 4 digits Min Length: 4 digits Rule: 2023

		Current year for which the aggregate data is reported.	Current year for which the aggregate data is reported.
<b>Update:</b> Table Specifications	PBM Formulary	File naming schema: pbm_formulary_{YYYY}_{ID}_{YYYYMMDD}.csv Example: pbm_formulary_2021_P12345_20220301.csv (Please use the submission due date, not the date the report was prepared) The submission of this report for this reporting year is due on March 1, 2025 and should include data for calendar year 2023.	File naming schema: pbm_formulary_{YYYY}_{ID}_{YYYYMMDD}.csv Example: pbm_formulary_2023_P12345_20230301.csv (Please use the submission due date, not the date the report was prepared)  The submission of this report for this reporting year is due on March 1, 2025 and should include data for calendar year 2023.
<b>Update Field</b> Year		Name: Year Type: Numeric Format: 0000 Max Length: 4 digits Min Length: 4 digits Rule: 2022  Current year for which the aggregate data is reported	Name: Year Type: Numeric Format: 0000 Max Length: 4 digits Min Length: 4 digits Rule: 2023  Current year for which the aggregate data is reported
<b>Update:</b> Table Specifications	Ownership	File naming schema: pbm_ownership_{YYYY}_{ID}_{YYYYMMDD}.csv Example: pbm_ownership_2022_P12345_20230301.csv (Please use the submission due date, not the date the report was prepared)  The submission of this report for this reporting year is due on March 1, 2024 and should include data for calendar year 2022.	File naming schema: pbm_ownership_{YYYY}_{ID}_{YYYYMMDD}.csv Example: pbm_ownership_2023_P12345_20240301.csv (Please use the submission due date, not the date the report was prepared)  The submission of this report for this reporting year is due on March 1, 2025 and should include data for calendar year 2023.
<b>Add Field:</b> Year		Name: Year Type: Numeric Format: 9999 Max Length: 4 digits Min Length: 4 digits Rule: 2022  Current year for which the aggregate data is reported.	Name: Year Type: Numeric Format: 9999 Max Length: 4 digits Min Length: 4 digits Rule: 2023  Current year for which the aggregate data is reported.