

CMS Manual System	Department of Health & Human Services (DHHS)
Pub 100-20 One-Time Notification	Centers for Medicare & Medicaid Services (CMS)
Transmittal 1809	Date: March 24, 2017
	Change Request 10027

SUBJECT: Client Letter v5.2 Upgrade - DME MAC Training and Testing

I. SUMMARY OF CHANGES: Client Letter v4.6 is a Commercial-Off-The-Shelf (COTS) product used by the Durable Medical Equipment (DME) Medicare Administrative Contractors (MACs). Top Down, the application developer, notified customers that they would no longer support version lower than v5.0, but agreed to provide support for VMS through September 30, 2017. Client Letter v5.2 is the latest version and will be implemented over two releases. The July 2017 release will focus on hardware and software acquisition and installations; letter template conversions; application setup and tuning. The October 2017 release will focus on testing and implementation. Client Letter v5.2 upgrade will be implemented in October 2017. The DME MACs will receive training on application changes, and test the v5.2 changes and the print vendor process.

EFFECTIVE DATE: April 24, 2017

**Unless otherwise specified, the effective date is the date of service.*

IMPLEMENTATION DATE: April 24, 2017

Disclaimer for manual changes only: The revision date and transmittal number apply only to red italicized material. Any other material was previously published and remains unchanged. However, if this revision contains a table of contents, you will receive the new/revised information only, and not the entire table of contents.

II. CHANGES IN MANUAL INSTRUCTIONS: (N/A if manual is not updated)

R=REVISED, N=NEW, D=DELETED-Only One Per Row.

R/N/D	CHAPTER / SECTION / SUBSECTION / TITLE
N/A	N/A

III. FUNDING:

For Medicare Administrative Contractors (MACs):

The Medicare Administrative Contractor is hereby advised that this constitutes technical direction as defined in your contract. CMS does not construe this as a change to the MAC Statement of Work. The contractor is not obligated to incur costs in excess of the amounts allotted in your contract unless and until specifically authorized by the Contracting Officer. If the contractor considers anything provided, as described above, to be outside the current scope of work, the contractor shall withhold performance on the part(s) in question and immediately notify the Contracting Officer, in writing or by e-mail, and request formal directions regarding continued performance requirements.

IV. ATTACHMENTS:

One Time Notification

Attachment - One-Time Notification

Pub. 100-20	Transmittal: 1809	Date: March 24, 2017	Change Request: 10027
-------------	-------------------	----------------------	-----------------------

SUBJECT: Client Letter v5.2 Upgrade - DME MAC Training and Testing

EFFECTIVE DATE: April 24, 2017

**Unless otherwise specified, the effective date is the date of service.*

IMPLEMENTATION DATE: April 24, 2017

I. GENERAL INFORMATION

A. Background: This change request (CR) supplements the contractor testing requirements found in CR9895, and provides the Durable Medical Equipment (DME) Medicare Administrative Contractors (MACs) with more specific business requirements and time frames for testing the Client Letter v5.2 upgrade.

Client Letter v5.2 is the latest version of the application and will be implemented over two releases. The July 2017 release will focus on contractor training; hardware and software acquisition and installations; letter template conversions; and application setup and tuning. The October 2017 release will focus on contractor testing, and the implementation of the Client Letter v5.2 upgrade.

Since the Single Testing Contractor (STC) is not able to test Client Letter, all testing associated with the Client Letter upgrade will be performed by the DME MACs. The DME MACs will receive training on application changes and test the v5.2 changes and the print vendor process.

Client Letter testing includes, but is not limited to, the following scenarios:

- Validation of temple conversions for all letter types (supplier, beneficiary, CC, etc.)
- Accessing history to test conversion on demand
- On-request and batch letter print file testing with DME MAC print vendors
- Ensuring Logos are valid
- System and formula variables
- Features/options within Client Letter
- Generating batch letters (Coordination of Benefits Contractor (COBC) and Administrative Simplification Compliance Act (ASCA))
- Performing letter maintenance (change, update, and new template features)
- Letter Maintenance Administration, such as Performing Representative permissions and profiles (add, delete, change, history only)

B. Policy: N/A

II. BUSINESS REQUIREMENTS TABLE

"Shall" denotes a mandatory requirement, and "should" denotes an optional requirement.

Number	Requirement	Responsibility								
		A/B MAC			D M E M A C	Shared- System Maintainers				Other
		A	B	H H H		F I S S	M C S	V M S	C W F	
10027.1	<p>The contractors shall attend two-day, web- based training on or around June 8 and 9, 2017.</p> <ul style="list-style-type: none"> Letter Maintenance Training Letter Generation Training <p>Note: The contractors will sign up prior to the training so that the Shared System Maintainer (SSM) trainer will know how many will be attending. This will be a train the trainer approach. Training materials will be provided by the SSM trainer.</p>				X					
10027.2	<p>The contractors shall attend the following one hour calls with CMS, the SSM and the VDC:</p> <ul style="list-style-type: none"> Kick-off Calls on or around 2/21/2017 and 2/22/2017 Weekly calls beginning on or around 5/10/2017 through September 20, 2017, and Daily Release Readiness call on or around 9/26/2017 				X					
10027.3	The Jurisdiction C (JC) contractor shall perform the following to complete v5.2 Integration and Testing:				X					
10027.3.1	JC shall make URL user updates on or around 6/1/2017 (Note: The contractor will receive v5.2 URL change requirements from the SSM).				X					
10027.3.2	JC shall test and validate converted templates on or around 7/10/2017.				X					
10027.3.3	JC shall maintain a “change log” of any changes/adjustments and/or adds of new templates and provide this information to the SSM on or around 9/6/2017 (Note: These template changes will be added to Production Migration Refresh by the SSM).				X					

Number	Requirement	Responsibility									
		A/B MAC			D M E M A C	Shared-System Maintainers				Other	
		A	B	H H H		F I S S	M C S	V M S	C W F		
10027.3.4	JC shall validate the added templates after Production Migration Refresh on or around 9/12/2017.				X						
10027.3.5	JC shall begin v5.2 Print Vendor Testing on or around 7/10/2017.				X						
10027.3.6	JC shall provide a signoff for the Print Files on or around 9/25/2017.				X						
10027.4	The Jurisdiction B (JB) contractor shall perform the following to complete v5.2 Integration and Testing:				X						
10027.4.1	JB shall make URL user updates on or around 6/1/2017 (Note: The contractor will receive v5.2 URL change requirements from the SSM).				X						
10027.4.2	JB shall test and validate converted templates on or around 7/10/2017.				X						
10027.4.3	JB shall maintain a “change log” of any changes/adjustments and/or adds of new templates and provide this information to the SSM on or around 9/6/2017 (Note: These template changes will be added to Production Migration Refresh by the SSM).				X						
10027.4.4	JB shall validate the added templates after Production Migration Refresh on or around 9/12/2017.				X						
10027.4.5	JB shall begin v5.2 Print Vendor Testing on or around 7/10/2017.				X						
10027.4.6	JB shall provide a signoff for the Print Files on or around 9/25/2017.				X						
10027.5	The Jurisdiction A (JA) contractor shall perform the following to complete v5.2 Integration and Testing:				X						
10027.5.1	JA shall make URL user updates on or around 6/1/2017 (Note: The contractor will receive v5.2 URL change requirements from the SSM).				X						
10027.5.2	JA shall test and validate converted templates on or around 8/1/2017.				X						
10027.5.3	JA shall maintain a “change log” of any changes/adjustments and/or adds of new templates and				X						

Number	Requirement	Responsibility										
		A/B MAC			DME	Shared-System Maintainers				Other		
		A	B	HHH		FMS	MCSS	VMS	CWF			
	provide this information to the SSM on or around 9/6/2017 (Note: These template changes will be added to Production Migration Refresh by the SSM).											
10027.5.4	JA shall validate the added templates after Production Migration Refresh on or around 9/12/2017.				X							
10027.5.5	JA shall begin v5.2 Print Vendor Testing on or around 8/1/2017.				X							
10027.5.6	JA shall provide a signoff for the Print Files on or around 9/25/2017.				X							
10027.6	The Jurisdiction D (JD) contractor shall perform the following to complete v5.2 Integration and Testing:				X							
10027.6.1	JD shall make URL user updates on or around 6/1/2017 (Note: The contractor will receive v5.2 URL change requirements from the SSM).				X							
10027.6.2	JD shall test and validate converted templates on or around 8/1/2017.				X							
10027.6.3	JD shall maintain a “change log” of any changes/adjustments and/or adds of new templates and provide this information to the SSM on or around 9/6/2017 (Note: These template changes will be added to Production Migration Refresh by the SSM).				X							
10027.6.4	JD shall validate the added templates after Production Migration Refresh on or around 9/12/2017.				X							
10027.6.5	JD shall begin v5.2 Print Vendor Testing on or around 8/1/2017.				X							
10027.6.6	JD shall provide a signoff for the Print Files on or around 9/25/2017.				X							
10027.7	The contractors shall perform User Acceptance Testing (End-to-End) of the v5.2 Upgrade beginning on or around 7/31/17 through September 29, 2017.				X							
10027.7.1	The Contractors shall report all questions/problems to the DME Maintainer through established communication channels.				X							

III. PROVIDER EDUCATION TABLE

Number	Requirement	Responsibility				
		A/B MAC			D M E	C E D I
		A	B	H H H		
	None					

IV. SUPPORTING INFORMATION

Section A: Recommendations and supporting information associated with listed requirements: N/A

"Should" denotes a recommendation.

X-Ref Requirement Number	Recommendations or other supporting information:

Section B: All other recommendations and supporting information: N/A

V. CONTACTS

Pre-Implementation Contact(s): Bonnie Hockaday, 410-786-1422 or bonnie.hockaday@cms.hhs.gov , Emma Battista, 315-345-4692 or emma.battista@cms.hhs.gov

Post-Implementation Contact(s): Contact your Contracting Officer's Representative (COR).

VI. FUNDING

Section A: For Medicare Administrative Contractors (MACs):

The Medicare Administrative Contractor is hereby advised that this constitutes technical direction as defined in your contract. CMS does not construe this as a change to the MAC Statement of Work. The contractor is not obligated to incur costs in excess of the amounts allotted in your contract unless and until specifically authorized by the Contracting Officer. If the contractor considers anything provided, as described above, to be outside the current scope of work, the contractor shall withhold performance on the part(s) in question and immediately notify the Contracting Officer, in writing or by e-mail, and request formal directions regarding continued performance requirements.

ATTACHMENTS: 0