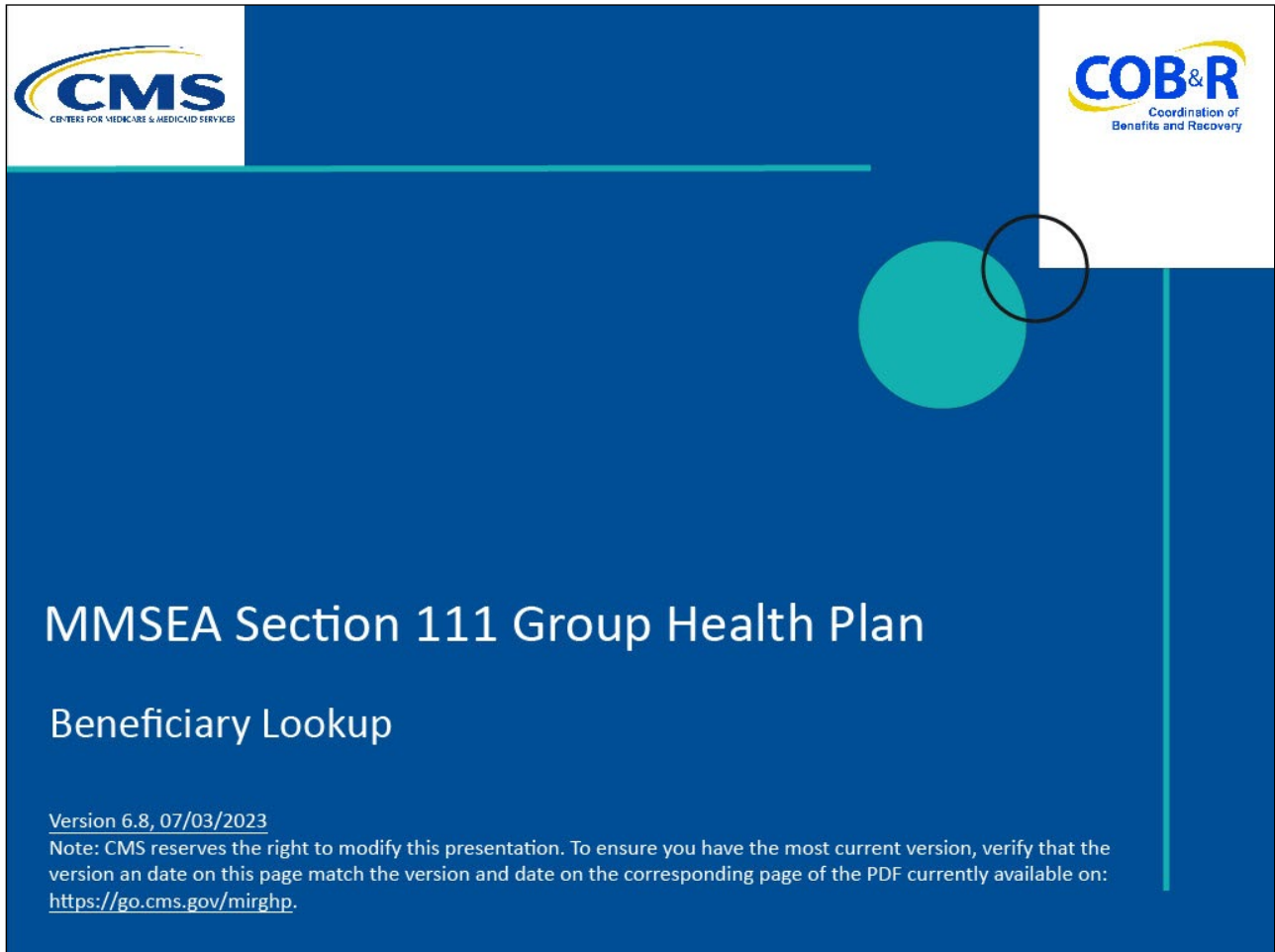


## Beneficiary Lookup

### Slide 1 - of 15 - Beneficiary Lookup Introduction



**CMS**  
CENTERS FOR MEDICARE & MEDICAID SERVICES

**COB&R**  
Coordination of  
Benefits and Recovery

# MMSEA Section 111 Group Health Plan

## Beneficiary Lookup

Version 6.8, 07/03/2023  
Note: CMS reserves the right to modify this presentation. To ensure you have the most current version, verify that the version and date on this page match the version and date on the corresponding page of the PDF currently available on:  
<https://go.cms.gov/mirghp>.

### Slide notes

Welcome to the Beneficiary Lookup training course.

**Slide 2 - of 15 - Disclaimer**

## Disclaimer

While all information in this document is believed to be correct at the time of writing, this Computer Based Training (CBT) is for educational purposes only and does not constitute official Centers for Medicare and Medicaid Services (CMS) instructions for the MMSEA Section 111 implementation. All affected entities are responsible for following the instructions found at the following link:  
<https://go.cms.gov/mirghp>.

**Slide notes**

While all information in this document is believed to be correct at the time of writing, this Computer Based Training or CBT is for educational purposes only and does not constitute official Centers for Medicare & Medicaid Services or CMS instructions for the MMSEA Section 111 implementation.

All affected entities are responsible for following the instructions found at [CMS GHP Website](https://go.cms.gov/mirghp)

Slide 3 - of 15 - Course Overview

## Course Overview

- Beneficiary Lookup Action
  - Query request limit
  - How to use
  - Matching criteria
  - Response results



### Slide notes

This module explains the Beneficiary Lookup action and who can use it. It reviews the query request limit associated with the Beneficiary Lookup function.


It shows how to use the Beneficiary Lookup action and explains the matching criteria and response results.

Slide 4 - of 15 - Beneficiary Lookup

## Beneficiary Lookup

Online, real-time query capability on the Section 111 COBSW

Provides a response as to whether information supplied for a covered individual can be matched to a Medicare beneficiary

An illustration of two stylized human figures, one in a blue shirt and one in a purple shirt, looking at a magnifying glass held by the purple-shirted figure. The magnifying glass is focused on a small area, symbolizing a search or lookup process.

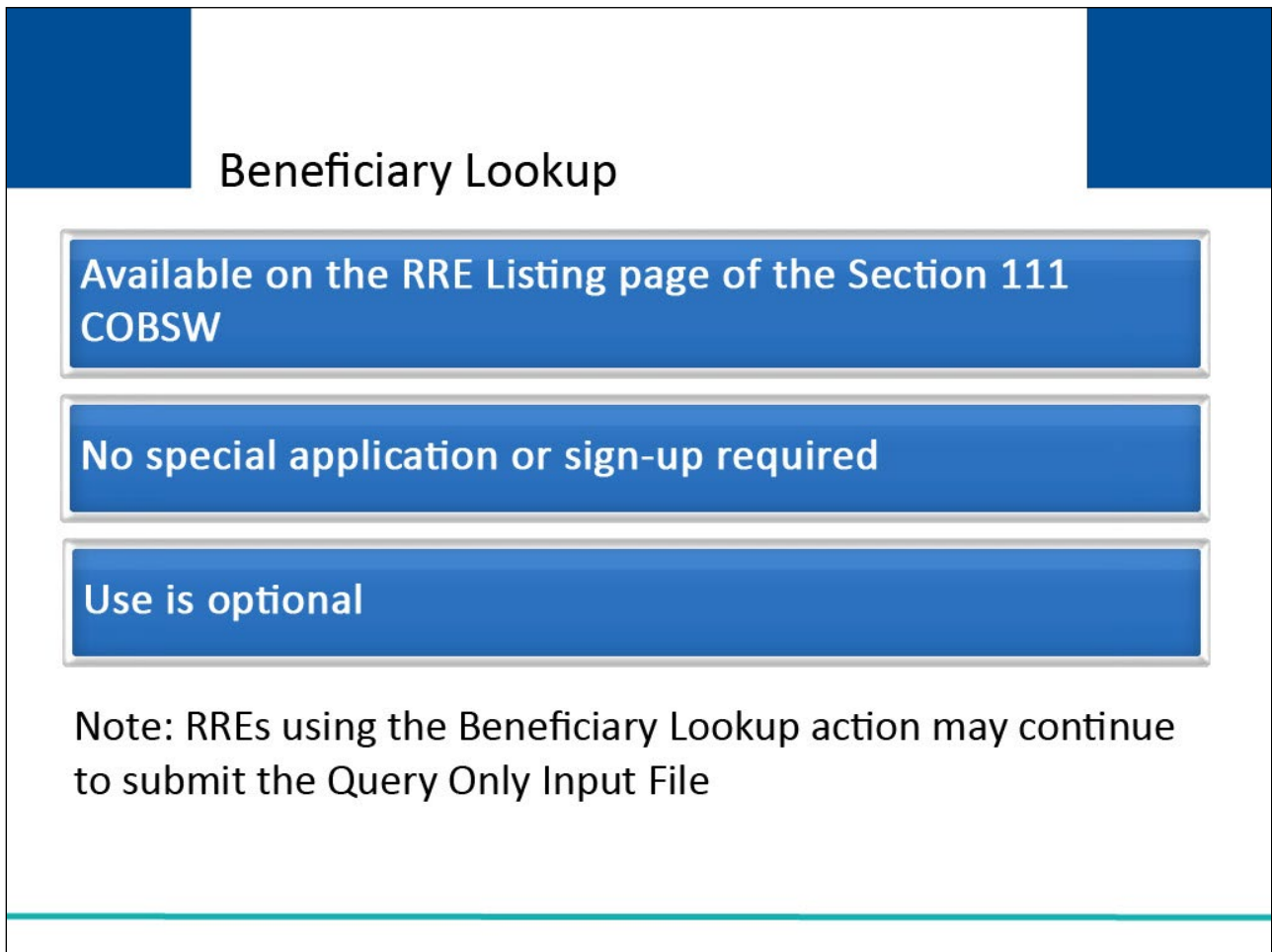
**Slide notes**

An online, real-time query capability is offered on the Section 111 Coordination of Benefits Secure Web site (COBSW).

The Beneficiary Lookup action provides a response as to whether the information supplied for a covered individual can be matched to a Medicare beneficiary.

The Beneficiary Lookup may be used to assist with reporting GHP information mandated by Section 111 of the MMSEA.

Slide 5 - of 15 - Beneficiary Lookup

The slide features a white background with a blue header bar at the top containing the title "Beneficiary Lookup". Below the header, there are three stacked blue rectangular boxes with white text. The first box says "Available on the RRE Listing page of the Section 111 COBSW". The second box says "No special application or sign-up required". The third box says "Use is optional". Below these boxes is a note in black text: "Note: RREs using the Beneficiary Lookup action may continue to submit the Query Only Input File".

**Beneficiary Lookup**

Available on the RRE Listing page of the Section 111 COBSW

No special application or sign-up required

Use is optional

Note: RREs using the Beneficiary Lookup action may continue to submit the Query Only Input File

**Slide notes**

The Beneficiary Lookup action is available on the RRE Listing page after logging on to the Section 111 COBSW.

There is no special application or sign-up required to utilize the Beneficiary Lookup action and use of the Beneficiary Lookup action is optional.

Please note that Responsible Reporting Entities (RREs) using the Beneficiary Lookup action may continue to submit the Query Only Input File.

Slide 6 - of 15 - Beneficiary Lookup

## Beneficiary Lookup

- Available to RREs that are in a production status
- All users associated to the RRE ID, Account Manager and Account Designees, will have access



### Slide notes

The Beneficiary Lookup action is available to RREs that are in production status. All users associated with the RRE ID, Account Manager, and Account Designees, will be able to use the Beneficiary Lookup function.

Slide 7 - of 15 - Query Request Limit

Query Request Limit

Beneficiary Lookup Response

The results of your beneficiary lookup appear below. Click the Prev button to return to the Beneficiary Lookup page where you can review the beneficiary information you entered. Click Next to perform another Beneficiary Lookup. Click Cancel to return to the RRE Listing page.

Medicare ID	#####A
First Name	FIRST
Middle Initial	M
Last Name	LAST
Gender	MALE
Date of Birth	##/##/####
Current Medicare Part A Effective Date	##/01/####
Entitlement Reason	###
ESRD Coverage Start Date	
ESRD Coverage End Date	
1st Dialysis Date	
Transplant Date	
Transplant Failure Date	
Self Training Date	
Current Medicare Part A Effective Date	0#/01/####
Current Medicare Part A Termination Date	
Current Medicare Part B Effective Date	##/##/####
Current Medicare Part B Termination Date	
Current Medicare Part C Enrollment Date	
Current Medicare Part C Termination Date	
Current Medicare Part C Contractor Number	
Current Medicare Part D Eligibility Start Date	##/##/####
Current Medicare Part D Eligibility End Date	
Current Medicare Part D Contractor Number	
Current Medicare Part D Enrollment Date	
Current Medicare Part D Termination Date	
Medicare Beneficiary Date of Death	

500 query requests per RRE ID per calendar month

[Print this page](#)

**Slide notes**

RREs are limited to 500 query requests per RRE ID per calendar month using the Beneficiary Lookup. The Transactions Remaining field will display the number of remaining available lookups.

It is in the upper right of the Beneficiary Lookup Response page. The Transactions Remaining count is reduced by 1 each time a query request is made (i.e., whether a match is found).


The system will reset this count to 500 on the first day of each succeeding calendar month.

Slide 8 - of 15 - RRE Listing Page

RRE Listing Page

**SECTION 111**  
Mandatory Reporting

[Reference Materials](#) | 
 [Contact Us](#) | 
 [Home](#) | 
 [Log off](#) | 
 [Skip Navigation](#)



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**RRE Listing**

This page lists all the Responsible Reporting Identification Numbers (RRE IDs) with which you are associated. You can select from the Actions available in the drop-down menu next to each RRE ID. Click on the down arrow, select an Action from the list and then click on the Go button.

To search for a specific RRE enter the RREID and click on the Search button. To refresh the complete list of RREs with which you are associated, click on the Refresh RRE Listing button.

The RRE Listing is sorted by RRE ID.

RRE ID

# items found, displaying all items.1


RRE ID	Name	Status	Profile Report Status	Submsn Period	Reporting Option	EDI Representative Name	EDI Phone Number	EDI Email	Actions
123456	AAAAAAAAAAAA	Setup	N/A	01	Expanded	Mike Jones	281-330-8004	mike@mikejones.com	Please Select <input type="button" value="Go"/>
77777	AAAAAAAAAAAA	Production	Recertified	01	Expanded	Jenny	202-867-5309	tommy@tutone.com	Please Select <input type="button" value="Go"/>
75555	AAAAAAAAAAAA	Test	N/A	04	Basic	Mike Hanks	410-333-3333	mk@mike.com	Please Select <input type="button" value="Go"/>
98765	AAAAAAAAAAAA	Production	Not Due	0	DDE	Susan Su	202-606-0842	susan@susan.com	Please Select <input type="button" value="Go"/>

Export options: [Text](#) | [Spreadsheet](#)

**QUICK HELP**

[Help About This Page](#)

[Submission Periods](#)

 [Print this page](#)


**I'd like to...**

[Manage Personal Information](#)

[Change Password](#)

[Logoff](#)

Login to Section 111 COBSW at  
<https://www.cob.cms.hhs.gov/Section111/>

 **SECURE AREA**

[Privacy Policy](#) | [User Agreement](#)

Slide notes

In order to access the Beneficiary Lookup action, users must first successfully log in to Section 111 COBSW [Section 111 Website](#). Once logged in, the RRE Listing page will display.

The user will click on the Actions drop-down box for the RRE ID under which they wish to query. The user will then select the Beneficiary Lookup action from the list and click on the Go button.



Slide 9 - of 15 - Beneficiary Lookup Page

### Beneficiary Lookup

Enter insured party's information below. When you click the Next button, a query transaction will be created to determine if this insured party is a Medicare beneficiary. Your transactions remaining will be reduced by one whether or not the beneficiary is found. Please carefully check your information before clicking the Next button.

**Required\***

Beneficiary Lookup Page

**Insured Party\***

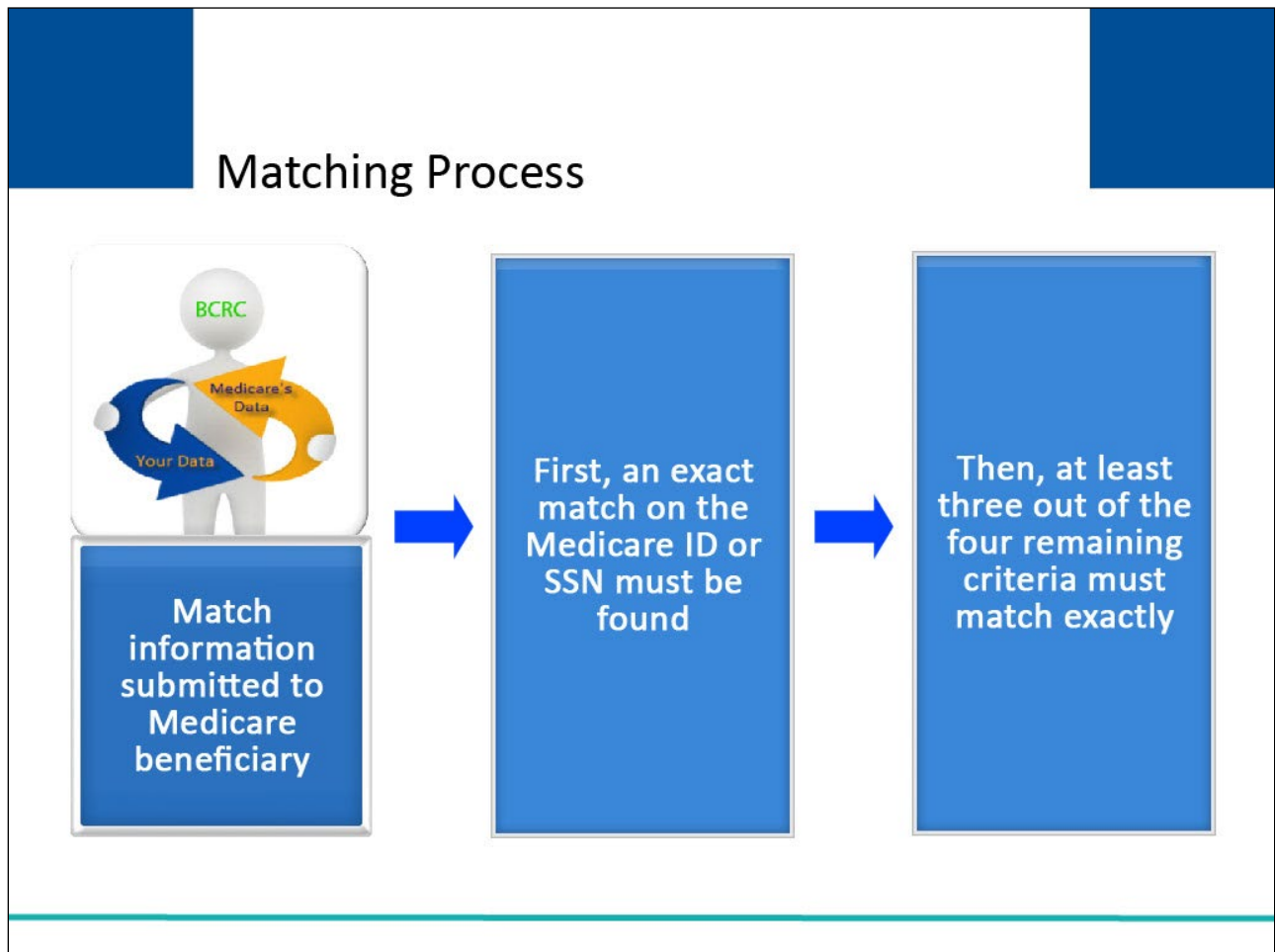
Medicare ID	<input type="text"/>	(12 characters max.)
OR		
SSN	<input type="text"/>	(9 digits or last 5 digits)
First Name*, Middle Initial, Last Name*	<input type="text"/> <input type="text"/> <input type="text"/>	
Gender*	<input type="radio"/> Female <input type="radio"/> Male	
Date of Birth*	<input type="text"/> / <input type="text"/> / <input type="text"/>	(MM/DD/YYYY)

**Slide notes**

The Beneficiary Lookup page will display. Required fields are denoted by asterisks.

Enter the following required information: Covered Individual's Medicare ID or Social Security Number (SSN), First Name, Last Name, Gender, and Date of Birth. Then click on the Next button.

Slide 10 - of 15 - Matching Process



**Slide notes**

The system will attempt to match the information submitted to a Medicare beneficiary. It will utilize the same matching criteria and methodology as used for the Query Only Input File and the MSP Input File.

First, an exact match on the Medicare ID or SSN must be found. If both the Medicare ID and SSN are supplied for the matching, only the Medicare ID will be used.

Then at least three out of the four remaining criteria must be matched exactly. Note: Only the first letter of the first name and the first six letters of the last name will be used for matching.

Slide 11 - of 15 - Match Found

Beneficiary Lookup Response

Match Found

The results of your beneficiary lookup appear below. Click the Prev button to return to the Beneficiary Lookup page where you can review the beneficiary information you entered. Click Next to perform another Beneficiary Lookup. Click Cancel to return to the RRE Listing page.

Medicare ID	#####A
First Name	FIRST
Middle Initial	M
Last Name	LAST
Gender	MALE
Date of Birth	##/##/####
Current Medicare Part A Effective Date	##/01/####
Entitlement Reason	####
ESRD Coverage Start Date	
ESRD Coverage End Date	
1st Dialysis Date	
Transplant Date	
Transplant Failure Date	
Self Training Date	
Current Medicare Part A Effective Date	0#/01/####
Current Medicare Part A Termination Date	
Current Medicare Part B Effective Date	##/##/####
Current Medicare Part B Termination Date	
Current Medicare Part C Enrollment Date	
Current Medicare Part C Termination Date	
Current Medicare Part C Contractor Number	
Current Medicare Part D Eligibility Start Date	##/##/####
Current Medicare Part D Eligibility End Date	
Current Medicare Part D Contractor Number	
Current Medicare Part D Enrollment Date	
Current Medicare Part D Termination Date	
Medicare Beneficiary Date of Death	

[Print this page](#)

Slide notes

If the covered individual information entered was matched to a beneficiary, the Beneficiary Lookup Response page displays the current information Medicare has on file.

Note: If the SSN was supplied by the user, this will also display.

Slide 12 - of 15 - No Match Found

The screenshot shows the CMS Section 111 Mandatory Reporting interface. At the top, there are navigation links: About This Site, CMS Links, How To..., Reference Materials, Contact Us, Home, Log off, and Skip Navigation. The CMS logo is on the left, and the COB-R logo is on the right. A 'QUICK HELP' button with a link to 'Help About This Page' is visible. A 'Transactions Remaining' box shows '97'. The main content area displays a red-bordered box with the text 'Beneficiary Not Found'. Below this is a message: 'We're sorry. We could not find a beneficiary for the identification numbers you specified. Click the Prev button to return to the Beneficiary Lookup page where you can review the beneficiary information you entered. Click Next to perform another Beneficiary Lookup. Click Cancel to return to the RRE Listing page. The beneficiary info you entered appears below. You may print this page for your records.' Below the message is a form with the following fields: Add Date (#####), Medicare ID (#####A), SSN (#####), First Name (FIRST), Middle Initial (M), Last Name (LAST), Gender (MALE), and Date of Birth (#####). The 'Prev', 'Cancel', and 'Next' buttons are at the bottom of the form. A 'Print this page' link is also present. At the bottom left, there is a 'SECURE AREA' indicator, and at the bottom center, there is a link to 'Privacy Policy | User Agreement'.

Slide notes

If the information entered cannot be matched to a Medicare beneficiary, a message displays indicating that no match was found.

The information entered for the query redisplay, but no information is returned indicating why a match was not found.

If the Beneficiary Not Found page displays, you have the option to click Prev (Previous) to return to the Beneficiary Lookup page, to review and edit the information entered.

When you perform another lookup after editing previously entered information, the transaction remaining count is reduced by 1.

Click on the Next button to go to a blank Beneficiary Lookup page to perform another query or click on the Cancel to return to the RRE Listing page.

## Slide 13 - of 15 - Course Summary

## Course Summary

- Beneficiary Lookup Action
  - Query request limit
  - How to use
  - Matching criteria
  - Response results





### Slide notes

This module explained the Beneficiary Lookup action and who can use it. It reviewed the query request limit associated with the Beneficiary Lookup function.

It showed how to use the Beneficiary Lookup action and explained the matching criteria and response results.

**Slide 14 - of 15 - Beneficiary Lookup Conclusion**



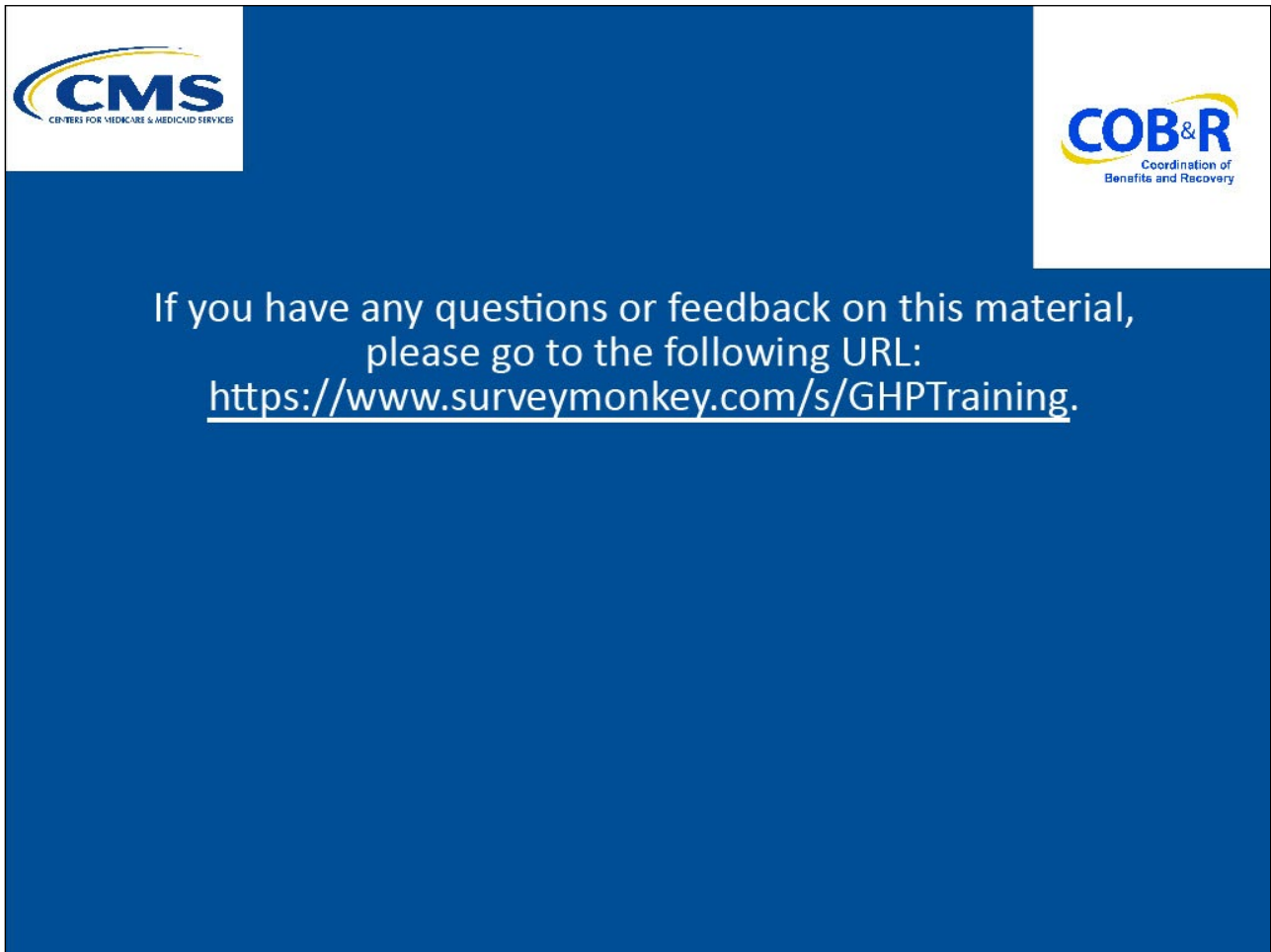
You have completed the Beneficiary Lookup course. Information in this course can be referenced by using the GHP User Guide's table of contents and any subsequent alerts. These documents are available for download at the following link:  
<https://go.cms.gov/mirghp>.

**Slide notes**

You have completed the Beneficiary Lookup course. Information in this course can be referenced by using the GHP User Guide's table of contents and any subsequent alerts.

These documents are available for download at the following link: [CMS GHP Website](https://go.cms.gov/mirghp).

Slide 15 - of 15 - GHP Training Survey



The slide features a dark blue background. In the top left corner is the CMS logo (Centers for Medicare & Medicaid Services). In the top right corner is the COB&R logo (Coordination of Benefits and Recovery). The central text, in white, reads: "If you have any questions or feedback on this material, please go to the following URL: <https://www.surveymonkey.com/s/GHPTraining>."

**Slide notes**

If you have any questions or feedback on this material, please go to the following URL: [Training Survey](#).