

Beneficiary Lookup

Slide 1 of 16 - Beneficiary Lookup

CMS
CENTERS FOR MEDICARE & MEDICAID SERVICES

COB&R
Coordination of
Benefits and Recovery

MMSEA Section 111 Liability Insurance (Including Self-Insurance), No-Fault Insurance, and Workers' Compensation

Beneficiary Lookup

Version 7.2, 10/02/2023

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Slide notes

Welcome to the Beneficiary Lookup CBT.

Note: This module only applies to Responsible Reporting Entities (RREs) that will be submitting Section 111 claim information via an electronic file submission.

Slide 2 of 16 - 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 & 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/mirnghp>.

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Slide 3 of 16 - Course Overview

Course Overview

- Beneficiary Lookup
 - 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.

NOTE: Liability insurance (including self-insurance), no-fault insurance, and workers' compensation are sometimes collectively referred to as "non-group health plan" or "NGHP".

The term NGHP will be used in this CBT for ease of reference.

Slide 4 of 16 - PAID Act

PAID Act

The Medicare Secondary Payer (MSP) policy is designed to ensure that the Medicare Program does not pay for healthcare expenses for which another entity is legally responsible. To aid settling parties in determining this information, Congress has enacted the Provide Accurate Information Directly Act also known as the PAID Act requiring that CMS provide Non-Group Health Plans with a Medicare beneficiary's Part C and Part D enrollment information for the past 3 years.

This information will be provided both online, in the BCRS application, and COBSW S111/MRA and offline in the NGHP Query Response File. Additionally, CMS has requested that this solution also include the most recent Part A and Part B Entitlement dates.

**Slide notes**

The Medicare Secondary Payer (MSP) policy is designed to ensure that the Medicare Program does not pay for healthcare expenses for which another entity is legally responsible. To aid settling parties in determining this information, Congress has enacted the Provide Accurate Information Directly Act also known as the PAID Act requiring that CMS provide Non-Group Health Plans with a Medicare beneficiary's Part C and Part D enrollment information for the past 3 years.

This information will be provided both online, in the BCRS application, and COBSW S111/MRA and offline in the NGHP Query Response File. Additionally, CMS has requested that this solution also include the most recent Part A and Part B Entitlement dates.

Note: To support the PAID Act, the Query Response File will be updated to include Contract Number, Contract Name, Plan Number, Coordination of Benefits (COB) Address, and Entitlement Dates for the last three years (up to 12 instances) of Part C and Part D coverage. The updates will also include the most recent Part A and Part B entitlement dates.


Slide 5 of 16 - Beneficiary Lookup

Beneficiary Lookup

Permits a user to submit an online query to determine the Medicare status of an injured party

Available to NGHP RREs that have not selected the DDE reporting option and are in a production status

Not available to RREs that use DDE because this same functionality is offered within the DDE process



Slide notes

The Beneficiary Lookup feature on the Section 111 Coordination of Benefits Secure Website (COBSW) permits a user to submit an online query when a Section 111 RRE has an immediate need to determine the Medicare status of an injured party.

This feature is available to NGHP RREs that have not selected the Direct Data Entry (DDE) reporting option and are in a production status.

Note: The Beneficiary Lookup action is not available to RREs that have DDE as a submission method because this same functionality is offered within the DDE process.

Slide 6 of 16 - Query Request Limit

Slide notes

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

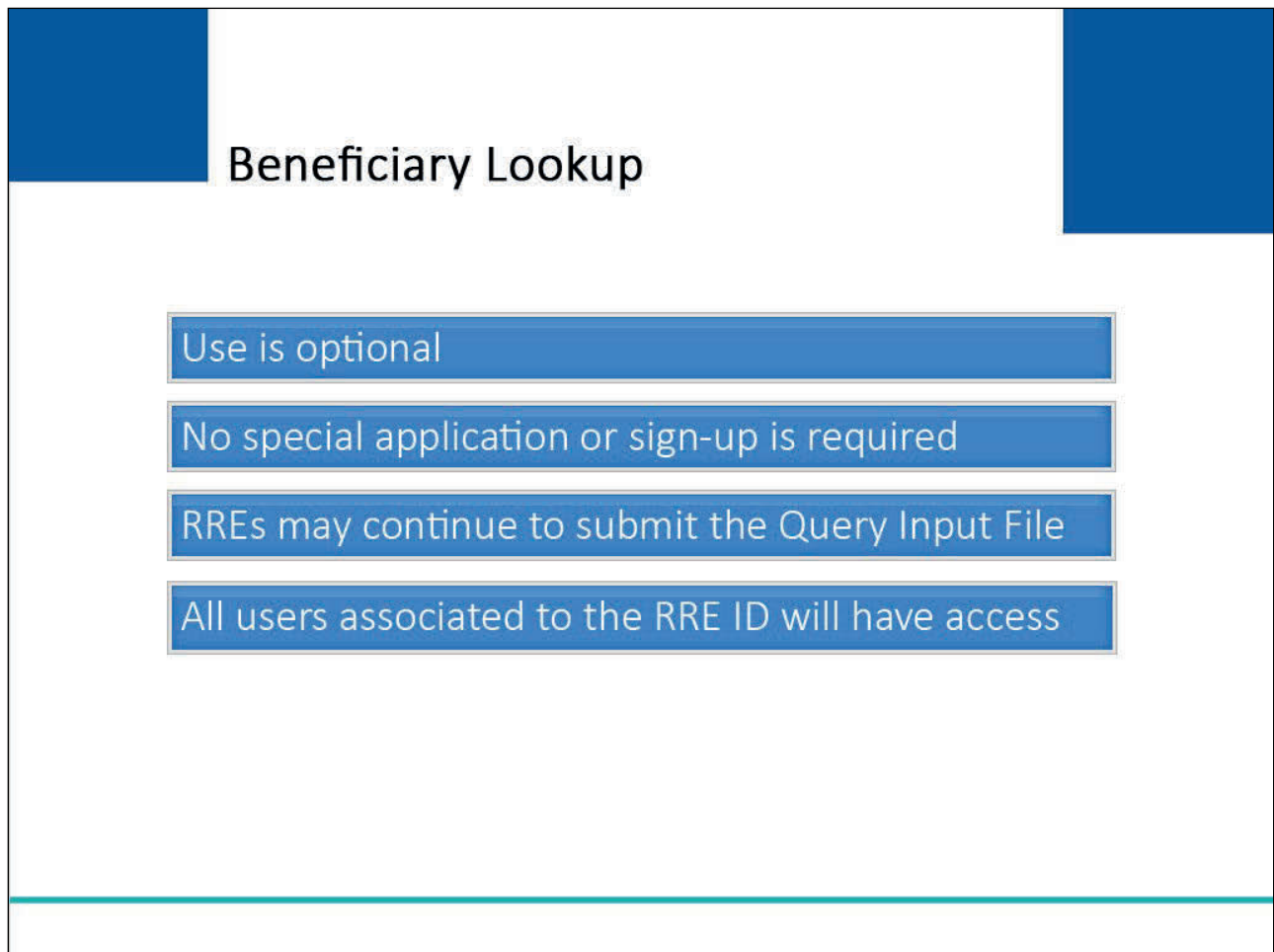
Note: DDE and GHP RREs accessing this page will not see the “Transactions Remaining” field as the lookup is not limited for those RREs.

It is located 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 or not a match is found).

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

Note: If you need to perform additional beneficiary lookups and have no transactions remaining, contact your Electronic Data Interchange (EDI) Representative.

Slide 7 of 16 - Beneficiary Lookup

The slide features a white background with a blue header bar at the top. The title "Beneficiary Lookup" is centered in the header. Below the title, four blue rectangular boxes are stacked vertically, each containing a line of text. A thin teal horizontal line is located at the bottom of the slide content area.

Beneficiary Lookup

- Use is optional
- No special application or sign-up is required
- RREs may continue to submit the Query Input File
- All users associated to the RRE ID will have access

Slide notes

Use of the Beneficiary Lookup action is optional. No special application or sign-up is required. RREs using the Beneficiary Lookup action may continue to submit the Query Input File.

All users associated with the RRE ID (Account Manager and Account Designees) will have access to the Beneficiary Lookup function.

Slide 8 of 16 - RRE Listing Page

SECTION 111
Mandatory Reporting

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 Search Refresh RRE Listing

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 Go
77777	AAAAAAAAAAAA	Production Recertified	01		Expanded	Jenny	202-867-5309	tommy@tutone.com	Please Select Go
75555	AAAAAAAAAAAA	Test	N/A	04	Basic	Mike Hanks	410-333-3333	mk@mike.com	Please Select Go
98765	AAAAAAAAAAAA	Production Not Due	0		DDE	Susan Su	202-606-0842	susan@susan.com	Please Select Go

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

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

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Slide notes

In order to access the Beneficiary Lookup action, users must first successfully login to the Section 111 COBSW ([CMS COBSW Section 111](https://www.cob.cms.hhs.gov/Section111)). Once logged in, the RRE Listing page will appear.

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

The S111/MRA application RRE Listing page will be modified to include the “Beneficiary Lookup” as an available action for DDE reporters.

Slide 9 of 16 - Beneficiary Lookup Page

SECTION 111
Mandatory Reporting

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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.

QUICK HELP
[Help About This Page](#)

Transactions Remaining
98

Required*

Insured Party*

Medicare ID (12 characters max.)

OR

SSN (9 digits or last 5 digits)

First Name*, Middle Initial, Last Name*

Gender* Female Male

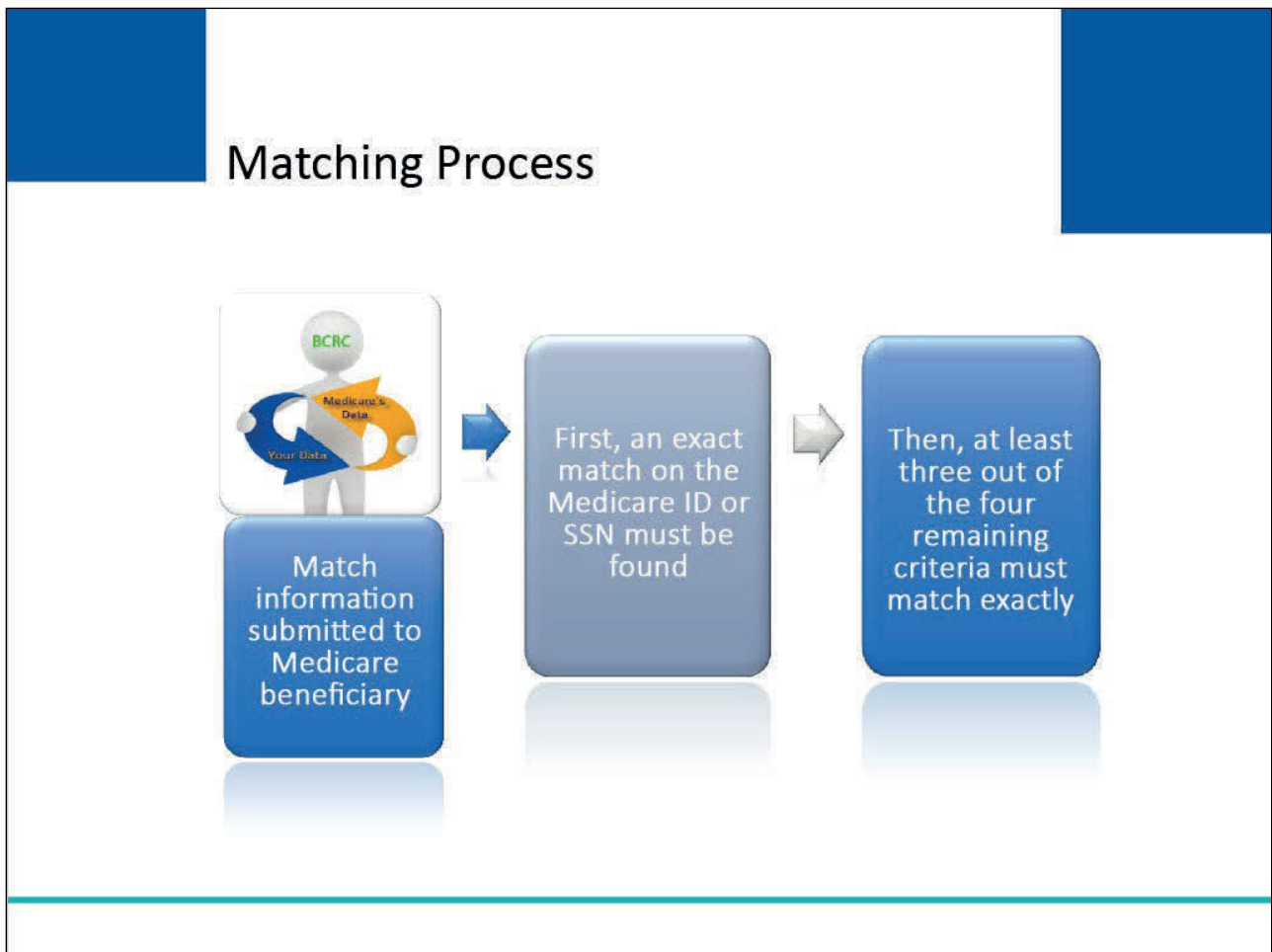
Date of Birth* / / (MM/DD/YYYY)

Slide notes

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

Enter the following required information: Injured Party'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 16 - 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 Input File and the Claim Input File.

First, an exact match on the Medicare ID or SSN (i.e., the last 5 digits or full 9 digits of the SSN, whichever is submitted) must be found. If both the Medicare ID and SSN are supplied for the matching, the search will be performed using the Medicare ID.

Then at least three out of the four remaining criteria must be matched exactly and all four must match when a partial SSN is used. 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 16 - Match Found


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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 #####

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Most Recent Medicare Entitlement Information

Part A		Part B	
Effective Date	Termination Date	Effective Date	Termination Date
01/01/2020	04/30/2020	01/01/2020	04/30/2020

Part C									
Contract Number	PBP Number	Effective Date	Termination Date	Contract Name	Address 1	Address 2	City	State	Zip
H1234	003	01/01/2020	04/30/2020	MA Plan 1	1 W Main Street	Suite 707	Anytown MD		12345

Part D									
Contract Number	PBP Number	Effective Date	Termination Date	Contract Name	Address 1	Address 2	City	State	Zip
S1234	003	01/01/2020	04/30/2020	RX Plan 1	1 W Main Street	Suite 707	Anytown MD		12345


Slide notes

If the injured party information entered was matched to a beneficiary, the Beneficiary Lookup Response page will appear with the current information Medicare has on file.


The Beneficiary Lookup Response page for NGHP RREs will now display the most recent Part A, Part B, Part C, and Part D dates, including contract identification and address information for Parts C and D.

It will also include a function to access a new Part C History page as well as a function to access a new Part D History page.

Slide 12 of 16 - Beneficiary Lookup Part C History



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Beneficiary Lookup Part C History

Medicare ID #####A
First Name FIRST
Middle Initial M
Last Name LAST
Gender MALE
Date of Birth #####

QUICK HELP

[Help About This](#)

[Print this p](#)

Contract Number	PBP Number	Effective Date	Termination Date	Contract Name	Address 1	Address 2	City	State	Zip
H1234	003	01/01/2020	04/30/2020	MA Plan 1	1 W Main Street	Suite 707	Anytown MD	12345	
H1234	003	11/01/2019	12/01/2019	MA Plan 1	1 W Main Street	Suite 707	Anytown MD	12345	
H1234	003	09/01/2019	10/31/2019	MA Plan 1	1 W Main Street	Suite 707	Anytown MD	12345	
H1234	003	07/01/2019	08/31/2019	MA Plan 1	1 W Main Street	Suite 707	Anytown MD	12345	
H1234	003	05/01/2019	06/30/2019	MA Plan 1	1 W Main Street	Suite 707	Anytown MD	12345	
H1234	003	03/01/2019	04/30/2019	MA Plan 1	1 W Main Street	Suite 707	Anytown MD	12345	
H2222	989	11/01/2018	12/31/2018	MA Plan 2	123 Second Ave		Anytown MD	98754	
H2222	989	09/01/2018	10/31/2018	MA Plan 2	123 Second Ave		Anytown MD	98754	
H2222	989	07/01/2018	08/31/2018	MA Plan 2	123 Second Ave		Anytown MD	98754	
H2222	989	05/01/2018	06/30/2018	MA Plan 2	123 Second Ave		Anytown MD	98754	

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Slide notes

The Beneficiary Lookup Part C History page will display Bene information and up to 12 occurrences of the following information covering the last 3 years of Part C coverage: Contract Number, Contract Name, Effective Date, Termination Date, Address, and PBP Number.

Slide 13 of 16 - No Match Found

Slide notes

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

The information entered for the query will reappear, but no information will be returned indicating why a match was not found.

If the Beneficiary Not Found page appears, you have the option to click [Prev] to return to the Beneficiary Lookup page where you can review and edit the information entered.

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

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

Slide 14 of 16 - Course Summary

Course Summary

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 - Query request limit
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Slide 15 of 16 - Conclusion



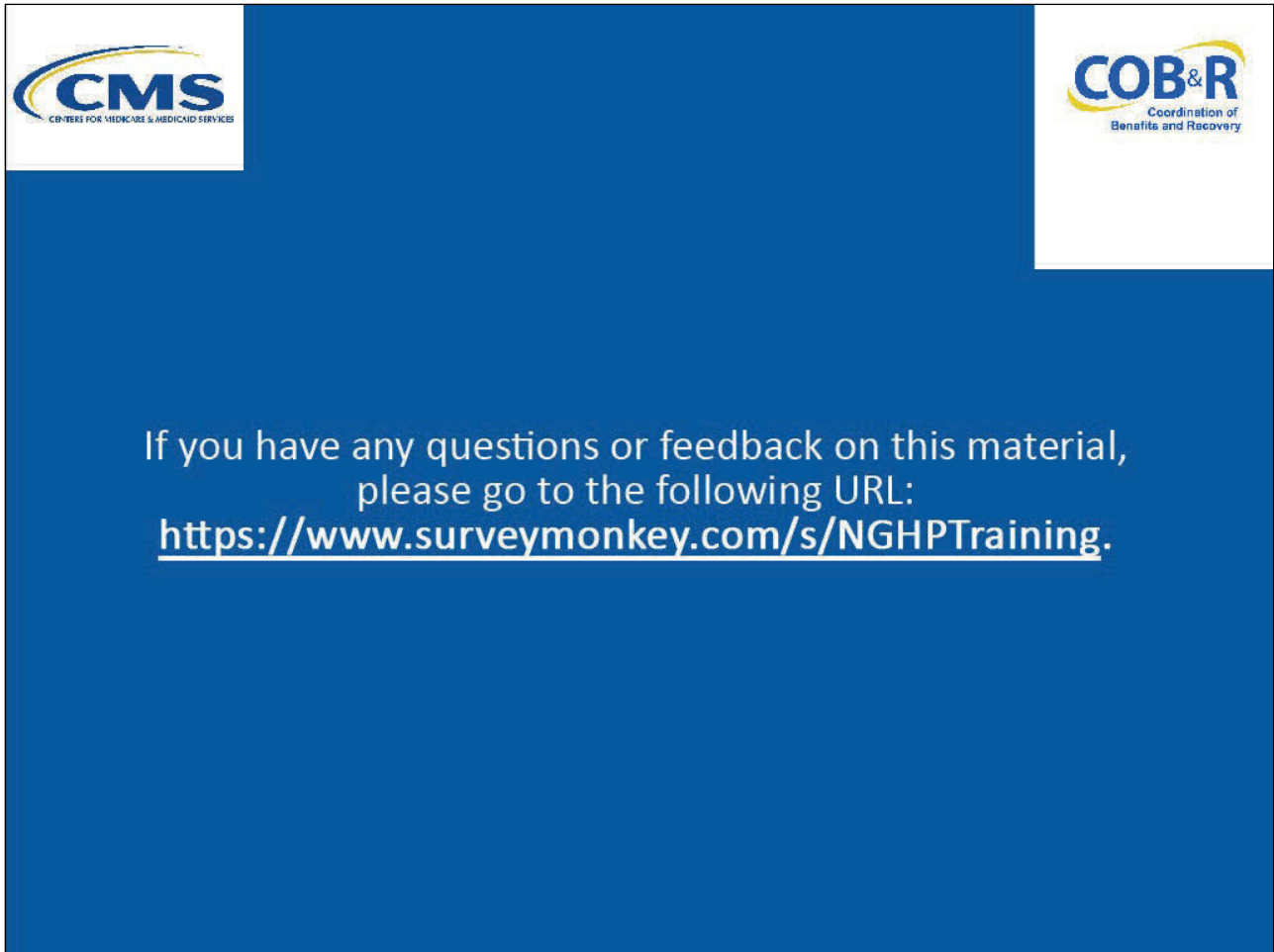
You have completed the Beneficiary Lookup course. Information in this course can be referenced by using the NGHP User Guide's table of contents. This document is available for download at the following link:
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Slide 16 of 16 - NGHP Training Survey



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

Slide notes

If you have any questions or feedback on this material, please go to the following URL: [NGHP Training Survey](https://www.surveymonkey.com/s/NGHPTraining).