Beneficiary Lookup

Slide 1 of 16 - Beneficiary Lookup

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

Slide notes

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: CMS NGHP Website.

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

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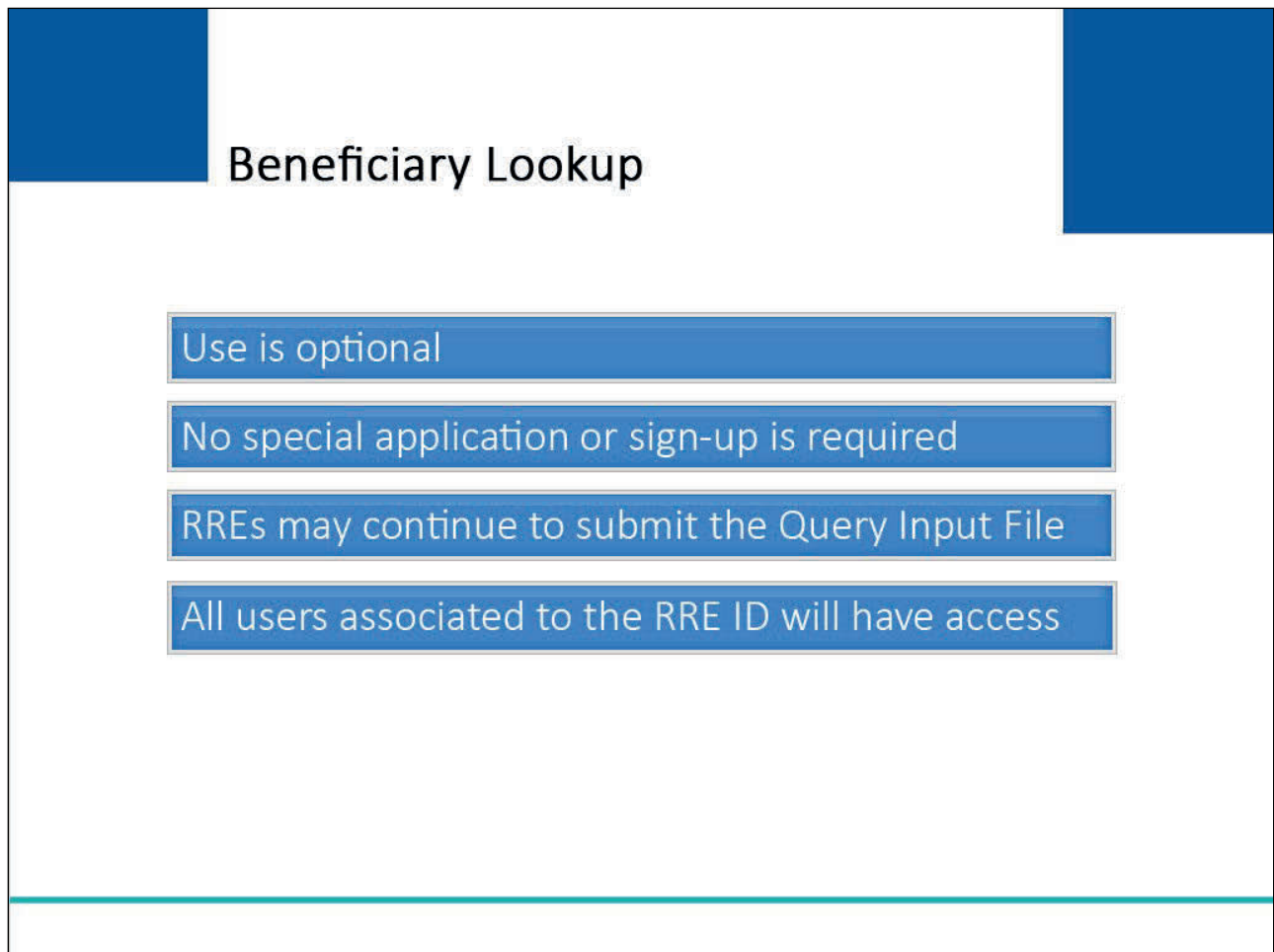
Note: DDE and GHP RREs accessing this page will not see the "Transactions Remaining" field as the lookup is not limited for those RREs.

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

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

Slide notes

In order to access the Beneficiary Lookup action, users must first successfully login to the Section 111 COBSW (CMS COBSW Section 111). 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.
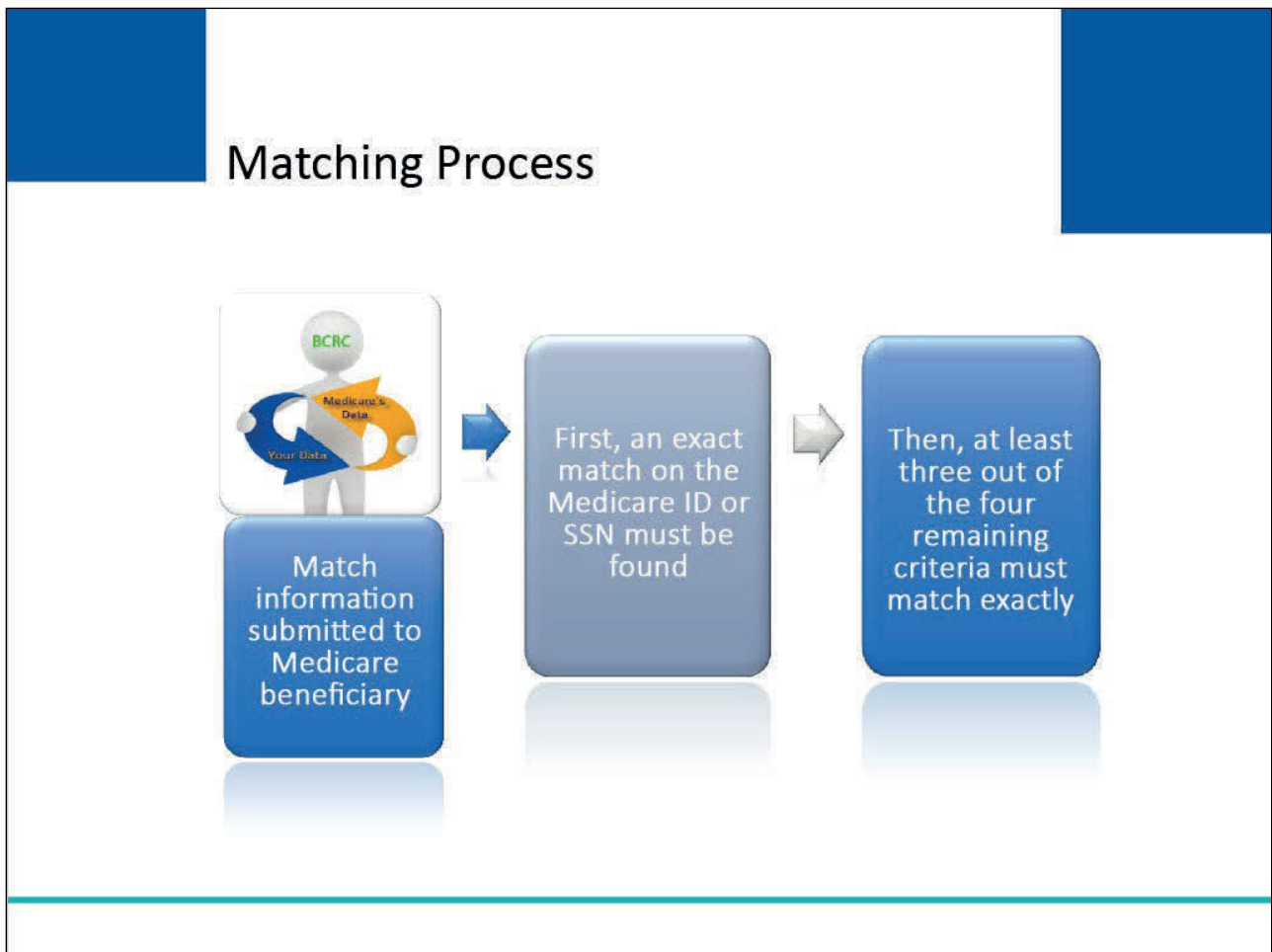
Slide 9 of 16 - Beneficiary Lookup Page

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

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

			SECTION 111						COB&R

CMS | | | Mandatory Reporting | | | | | | Coordination of Benefits and Recovery

| About This Site | CMS Links | How To... | Reference Materials | Contact Us | Home | Log off | Skip Navigation |

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

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

| Prev | Cancel | Next |

🔒 SECURE AREA

Privacy Policy | User Agreement

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

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.
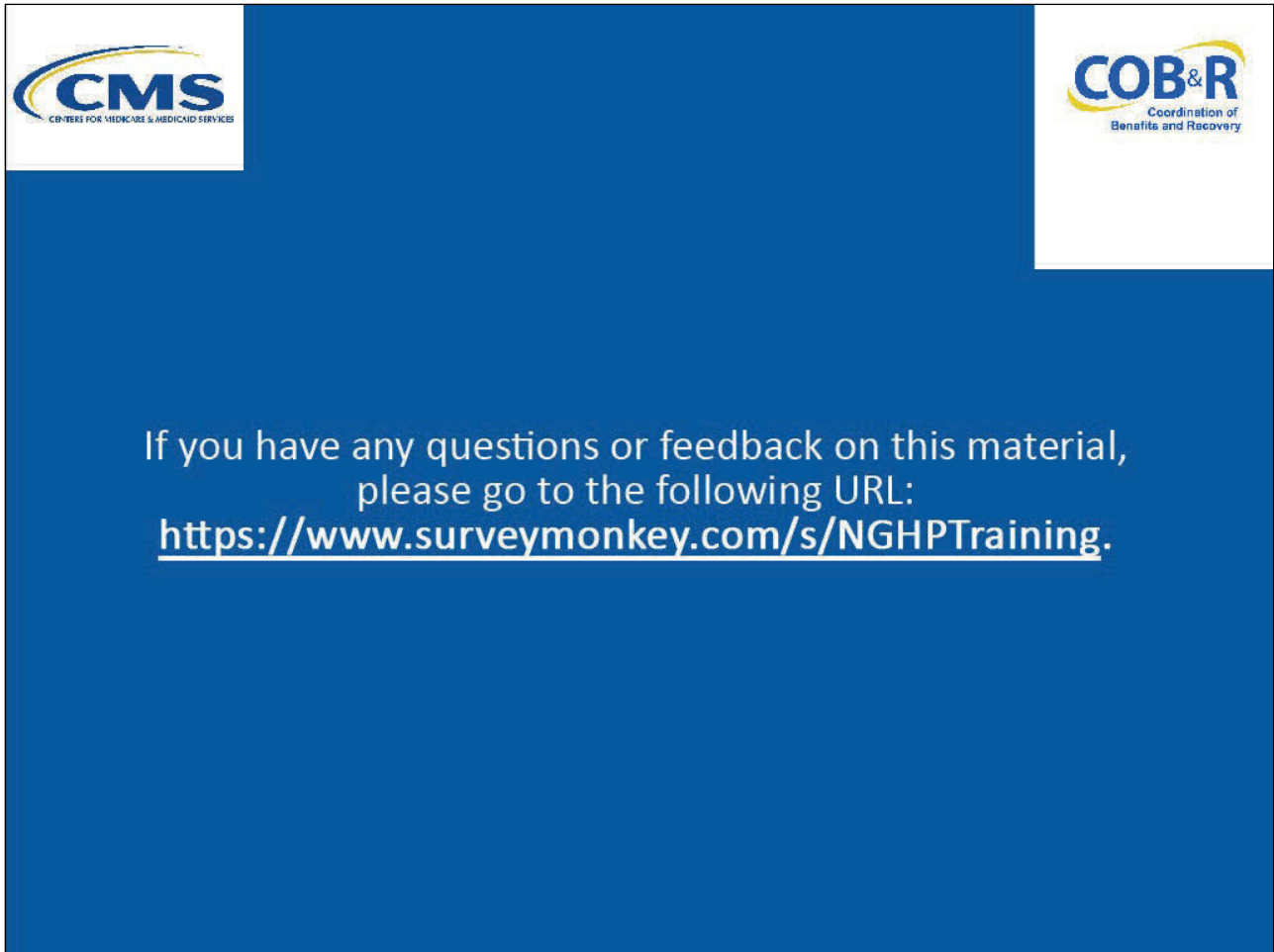
Slide 15 of 16 - Conclusion

Slide notes

You have completed the Beneficiary Lookup course. Information in this course can be referenced by using the NGHP User Guide's table of contents.

These documents are available for download at the following link: CMS NGHP Website.

Slide 16 of 16 - NGHP Training Survey

Slide notes

If you have any questions or feedback on this material, please go to the following URL: NGHP Training Survey.