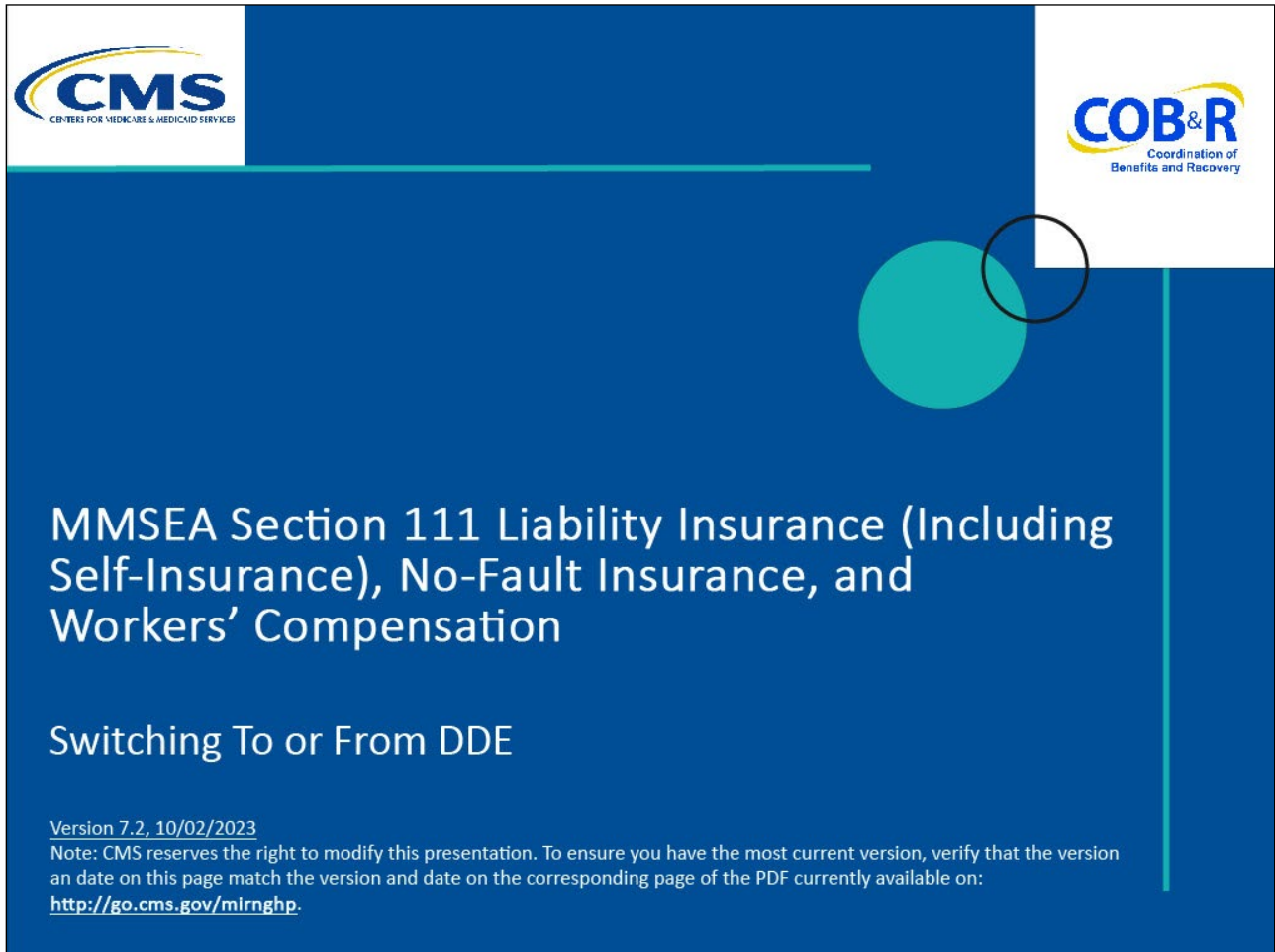


Switching To or From DDE

Slide 1 of 24 - Switching To or From DDE



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

Switching To or From DDE

Version 7.2, 10/02/2023
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:
<http://go.cms.gov/mirnghp>.

Slide notes

Welcome to the Switching To or From Direct Data Entry (DDE) course.

Slide 2 of 24 - 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>.

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

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All affected entities are responsible for following the instructions found at the following link: <http://go.cms.gov/mirnghp>.

Slide 3 of 24 - Course Overview

Course Overview

- Switching to DDE from a File Submission Method
- Switching from DDE to a File Submission Method

* Direct Data Entry is only available for NGHPs at this time

**Slide notes**

This course explains the process a Non-Group Health Plan (NGHP) Responsible Reporting Entity (RRE) must follow when switching to Direct Data Entry (DDE) from a file submission method, explains how an NGHP RRE can switch to a file submission method from DDE, and includes general information regarding these methods.

This course is intended for NGHP RREs that have already completed the registration and account setup processes. Direct Data Entry is only available for NGHPs at this time.

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 24 - 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.

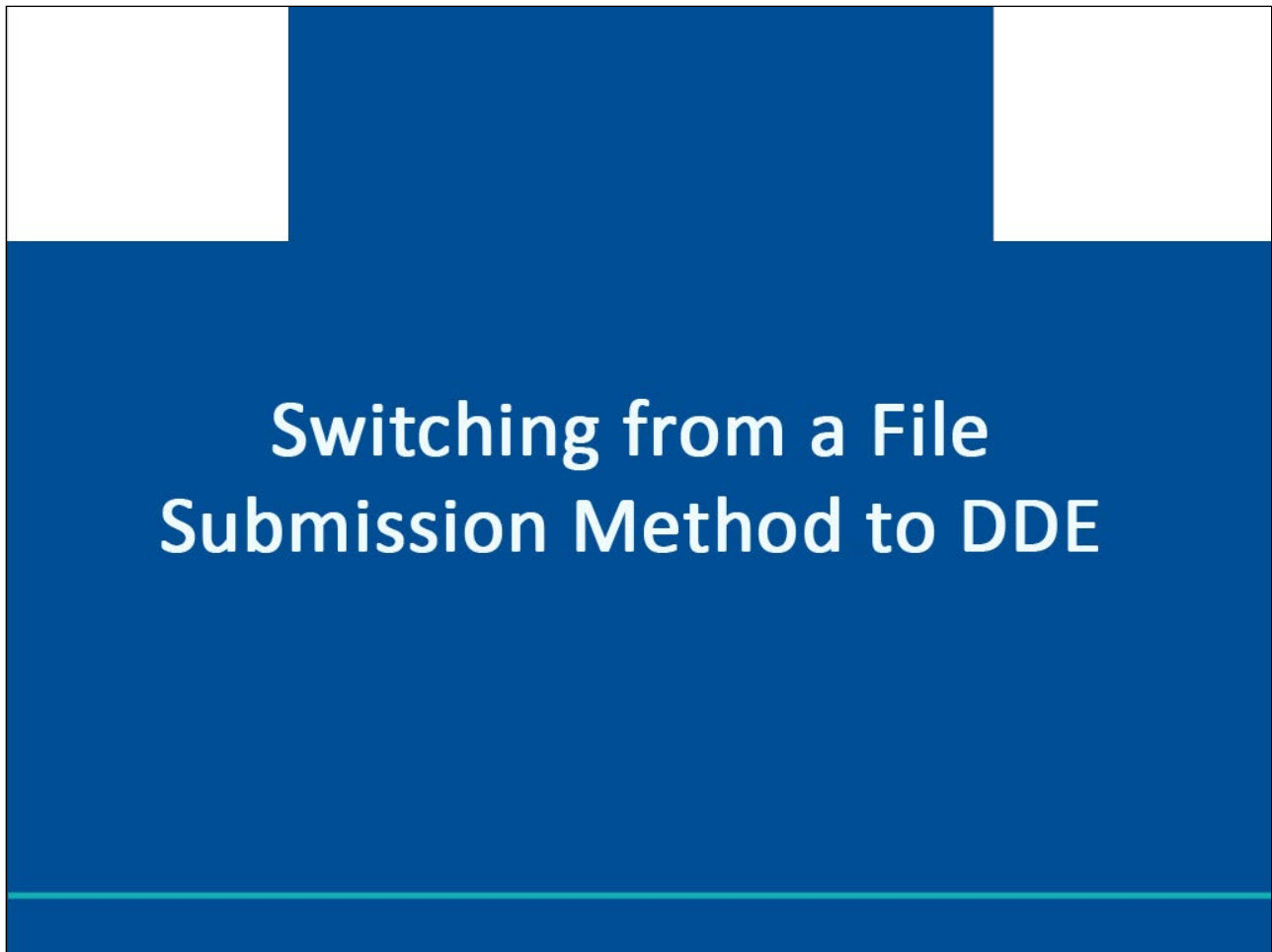
**Slide notes**

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 three 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 24 - Switching from a File Submission Method to DDE



Slide notes

This part of the course explains the process an NGHP RRE will follow to change their reporting method from a file submission method to DDE.

Slide 6 of 24 - Direct Data Entry

The slide features a white background with two blue rectangular accents in the top corners. The title "Direct Data Entry" is centered at the top. Below it is a bulleted list item. A blue callout box highlights the text "Intends to submit 500 or fewer claim reports per year". A thin teal horizontal line is located at the bottom of the slide content area.

Direct Data Entry

- NGHP RRE must be a Small Reporter

Intends to submit 500 or fewer claim reports per year

Slide notes

To qualify for the DDE method, the NGHP RRE must be a Small Reporter, which is defined as an RRE that intends to submit 500 or fewer claim reports per year.

Slide 7 of 24 - Switching to DDE

Switching to DDE

Original Account Setup information:

The screenshot shows the CMS SECTION 111 Mandatory Reporting website. 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 main heading is "RRE Information Summary" with a "Print this page" link. Below this, there is a paragraph explaining that profile reports must be recertified annually and that users should verify the RRE information displayed is accurate and click the Recertify button at the bottom of the page to recertify. It also states that if the Profile Report contains any inaccuracies or outdated information, users should click the Edit button to make changes and then click the Recertify button to recertify their account. A "Print this page for your records" link is also present.

Profile Report Information		Recertification Due Date:		04/15/2020
Reporter ID:	123456	Last Recertification Submission Date:	01/10/2019	
Profile Report Date:	02/10/2020			
Profile Changed Date:	02/10/2020			

RRE Company Information		EDI Representative Information	
TIN:	123456789	Name:	Mark Smith
NAIC:	111111	Email:	msmith@gmail.com
Name:	Company ABC	Phone:	(410) 333-3333 ext: 1234
Address:	123 Street		

- May change to DDE if they now expect to submit fewer than 500 claims annually
- Must contact their EDI Representative to make this change

Slide notes

RREs that are currently set up with a file transmission method (i.e., Hypertext Transfer Protocol over Secure Socket Layer (HTTPS), Secure File Transfer Protocol (SFTP), or Connect:Direct via CMS EFT) and originally indicated during their Account Setup that they had more than 500 annual expected claims, may change from their current file transmission method to the DDE submission method

if they now expect to submit fewer than 500 claim reports on an annual basis. These RREs must contact their EDI Representative for assistance in making this submission change.

Slide 8 of 24 - Switching to DDE

Switching to DDE

RRE currently set up with HTTPS, SFTP, or Connect:Direct via CMS EFT and originally indicated 500 or fewer annual expected claims

- May change to DDE on the Section 111 COBSW without EDI Representative assistance
 - RRE's Account Manager can make this change
- Note: Connect:Direct via CMS EFT submitters are strongly encouraged to contact EDI Representative for assistance
 - EDI Representative will perform cleanup activities

Slide notes

RREs that are currently set up with a file transmission method (i.e., HTTPS, SFTP, or Connect:Direct via CMS EFT) and originally indicated during their Account Setup that they had 500 or fewer annual expected claims, may change from their current file submission method to the DDE submission method without EDI Representative assistance.

The RRE's Account Manager can make this change on the Section 111 Coordination of Benefits Secure Website (COBSW) themselves.

Please note: Although RREs currently set up with Connect:Direct via CMS EFT may change to DDE without EDI Representative assistance if they originally indicated during their Account Setup that they had 500 or fewer annual expected claims, these RREs are strongly encouraged to contact their EDI Representative for help with this process. The EDI Representative will be required to perform some cleanup activities for these submitters.

Slide 9 of 24 - Getting Started

The screenshot shows the 'SECTION 111 Mandatory Reporting' website. At the top, there are logos for CMS and COB&R. A navigation bar includes links for 'About This Site', 'CMS Links', 'How To...', 'Reference Materials', 'Contact Us', and 'Skip Navigation'. A large blue button labeled 'Getting Started' is prominent. Below it, a 'Welcome to the Section 111 COBSW Web site (COBSW)' message is visible. To the right, an 'Account Login' section contains fields for 'User Name' and 'Password', with links for 'Forgot Login ID' and 'Forgot Password'. A 'SECTION 111 MESSAGES' box states: 'The system will be unavailable for infrastructure maintenance from 9-25 thru 9-27.' The main content area provides information for Responsible Reporting Entities (RREs) impacted by the Medicare Secondary Payer (MSP) reporting mandate. It includes links for 'Mandatory Insurer Reporting for GHP' and 'Mandatory Insurer Reporting for Non GHP'. A 'Getting Started' section refers to 'How To Get Started' under the 'How To' menu option. At the bottom, a process flow shows 'Step 1' with a 'New Registration' button and 'Step 2' with 'Account Setup (GHP)' and 'Account Setup (NGHP)' buttons. Two callout boxes are overlaid on the right side: one explains that the Account Manager for RRE ID with 500 or fewer annual expected claims should log in to make a change, and another provides the URL <https://www.cob.cms.hhs.gov/Section111/> for this purpose.

Slide notes

In order to switch from a file submission method to DDE, the Account Manager for the RRE ID that originally indicated during their Account Setup that they had 500 or fewer annual expected claims should log into the Section 111 COBSW at <https://www.cob.cms.hhs.gov/Section111/> to make this change.

Slide 10 of 24 - Switching to DDE

SECTION 111
Mandatory Reporting

Navigation: [About This Site](#) [CMS Links](#) [How To...](#) [Reference Materials](#) [Contact Us](#) [Home](#) [Log off](#) [Skip Navigation](#)

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 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								Please Select Go

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

Callouts:

- Switching to DDE
- RRE Listing Page
- Functions as the main processing screen or Home page
- Users can only switch methods for those RREs that they are the associated Account Manager

SECURE AREA

Slide notes

After a successful login, the RRE Listing Page will display. This page functions as the main processing screen, or Home page, to initiate any of the Section 111 COBSW processes.

It lists all of the RRE IDs to which the user is associated. Users can only switch methods for those RREs that they are the associated Account Manager.

Slide 11 of 24 - Switching to DDE

SECTION 111
Mandatory Reporting

RRE Listing

This page lists all the Responsible Reporting Identification Numbers (RRE) associated. You can select from the Actions available in the drop-down menu 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 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 Please Select RRE Information Test File Results Upload File Designee Maintenance View Account Activity Register for DDE
98765	AAAAAAAAAAAA	Production Not Due		0	DDE	Susan Su	202-606-0842	susan@susan.com	

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

SECURE AREA

Slide notes

On the RRE Listing Page, the Account Manager will click on the Actions dropdown box for the applicable RRE ID, select Register for DDE, and then click Go.

Note: RREs that indicated that they expected to submit more than 500 claims on an annual basis during the Account Setup step will receive an error if they select the Register for DDE action.

Since DDE submitters must indicate that they plan to submit 500 or fewer claim reports on an annual basis, these RREs must contact their EDI Representative to proceed with this change.

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

Slide 12 of 24 - Switching to DDE

Register Reporter for Direct Data Entry (DDE)

Direct Data Entry (DDE) enables you to directly enter, review, and monitor your claim information using the COB Secure Website. It is designed to reduce the cost of submitting claims for reporters that submit 500 or fewer claims annually. If you register for DDE you will not be able to submit claims via file; however, you may continue to monitor the status of files you submitted previously.

The ability to enter claims using DDE will be introduced in early 2011. Would you like to register for DDE now?

Switching to DDE

- Once Yes is clicked, RRE profile is updated
 - RRE will be unable to submit files

SECURE AREA

CMS/HHS Vulnerability Disclosure Policy | Privacy Policy | User Agreement

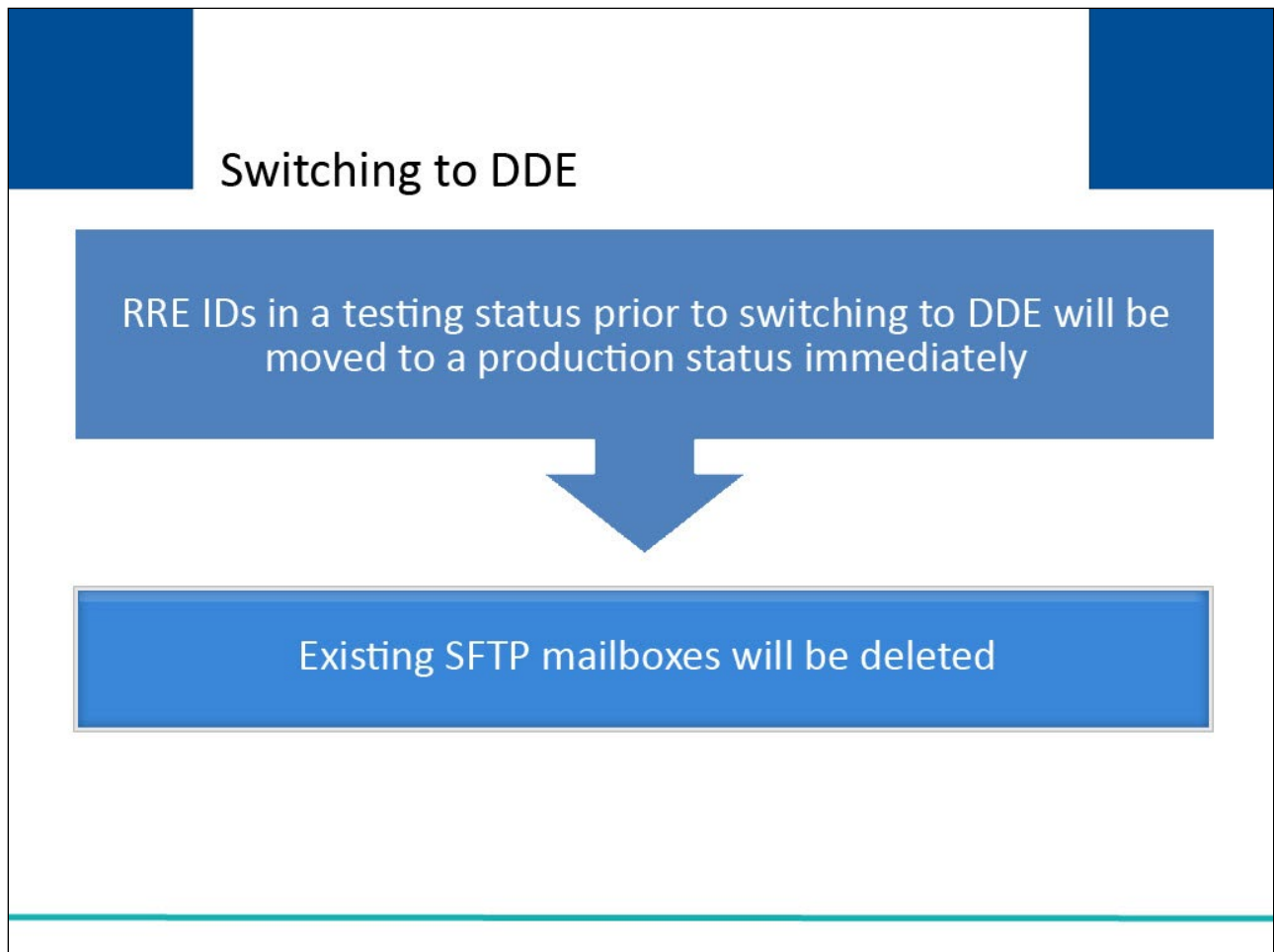
Slide notes

The system will display the Register Reporter for Direct Data Entry (DDE) screen. The Account Manager must click yes to confirm that they wish to change from a file submission method to DDE.

Once Yes is clicked, the system will update the RRE profile to DDE and return the Account Manager to the RRE Listing page.

These RRE IDs will no longer be able to submit any Claim Input Files. If they attempt to, the Account Manager will receive an email indicating the file has failed with a severe error.

Slide 13 of 24 - Switching to DDE

**Slide notes**

RRE IDs in a testing status prior to switching to DDE will be moved to a production status immediately since testing is not required for DDE.

Any existing SFTP mailboxes previously established for the RRE ID will not be deleted immediately, as they may contain submitted files in process or response files to be downloaded.

However, these mailboxes will eventually be deleted as appropriate, at a later date, by the Benefits Coordination & Recovery Center (BCRC).

Slide 14 of 24 - Switching to DDE - Previously Submitted Files

Switching to DDE Previously Submitted Files

- RREs that change to DDE from a file submission
 - Will not see any claim reports previously reported via a file submission on the DDE Claim Listing screens
 - Can continue to view file processing results for their previously submitted test and production files using Test File Results and File Processing Results actions

Slide notes

When an RRE has changed their submission method from a file-related process to DDE, any claim reports previously reported via a file submission method will not be listed on the DDE Claim Listing screens.

RREs can continue to view file processing results for their previously submitted test and production files using the Test File Results and File Processing Results actions on the RRE Listing page.

Note: DDE RREs accessing certain pages in the COBSW Section 111 will not see the “Transaction Remaining” field as the lookup is not limited for those RREs.

Slide 15 of 24 - Switching to DDE - Updating Records Accepted via File Submission

Switching to DDE - Updating Records Accepted via File Submission

- To view, update and/or delete a claim report previously submitted and accepted via file submission on a DDE Claim Listing screen
 - RRE must resubmit the record as a New Claim using DDE
 - Key data fields must match key data fields on previously accepted file submission claim report
 - System will treat the newly added claim report as an update
 - New DDE claim report will be visible on DDE screens
 - RRE can maintain the claim report using DDE
 - Any resubmission of claim information will count towards your annual 500 claim transaction limit

Slide notes

In order for an RRE to view, update, and/or delete a claim report previously submitted and accepted via a file submission method on a DDE Claim listing screen, the RRE will have to resubmit the claim report as a New Claim using DDE.

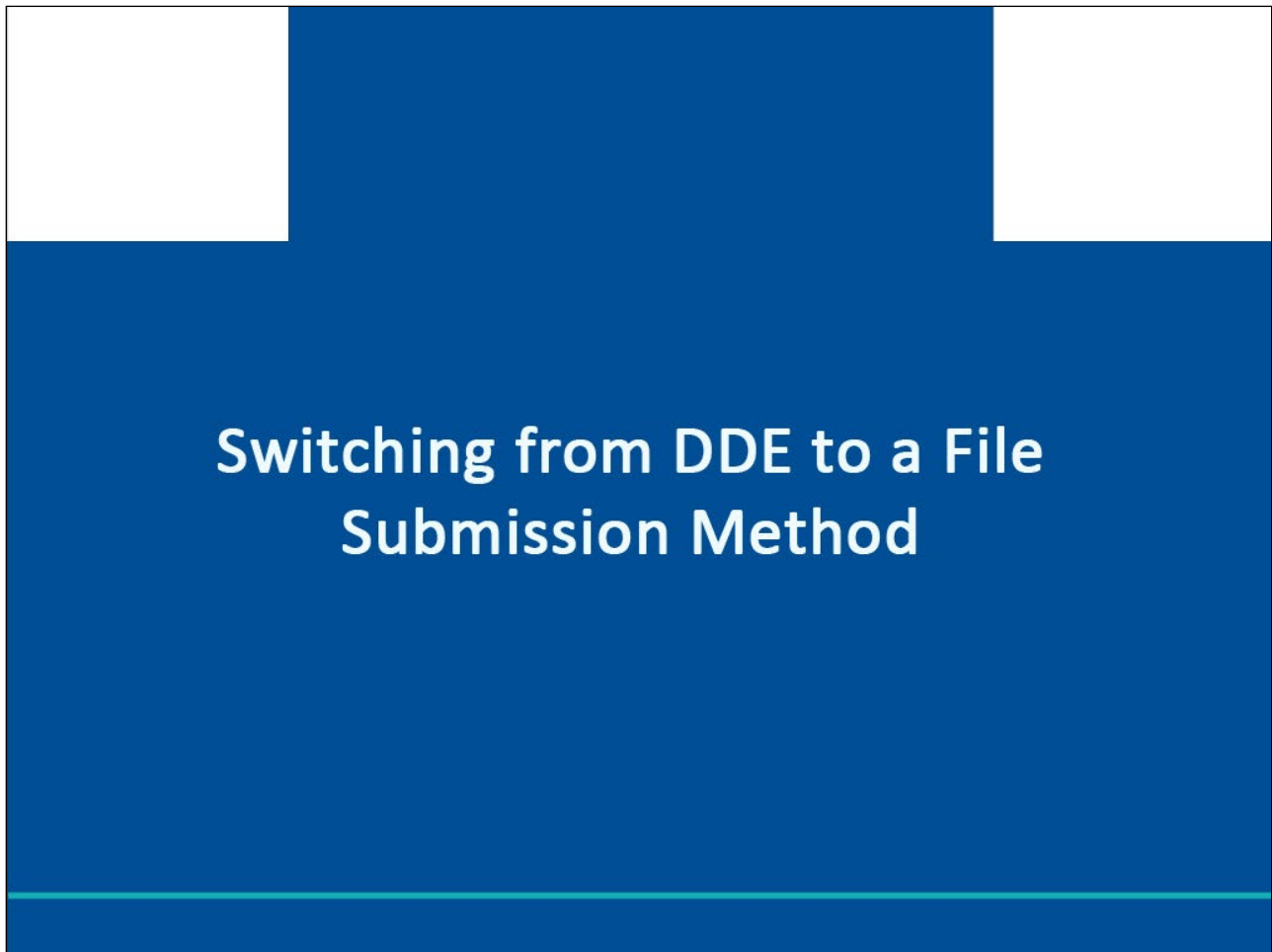
When the claim report is resubmitted, the key data fields must match the key data fields on the previously accepted file submission claim report.

The system will treat the newly added DDE claim report as an Update Record to the claim report previously submitted in the file submission.

The new DDE claim report will then be visible on the DDE screens and the RRE will be able to maintain the claim report using DDE.

Please remember, any resubmission of claim information will count towards your annual 500 claim transaction limit.

Slide 16 of 24 - Switching from DDE to a File Submission Method



Slide notes

This part of the course explains the process a NGHP RRE will follow to change their reporting method from DDE to a file submission method.

Slide 17 of 24 - Switching to File Submission from DDE

Switching to File Submission from DDE

- RREs that chose DDE and later determine they should be using a file submission method must contact their EDI Representative



Slide notes

RREs that are currently setup with DDE and later determine that they should be using a file submission method must contact their EDI Representative to make this switch.

Slide 18 of 24 - Switching to File Submission from DDE Status

Switching to File Submission from DDE Status

- Once the EDI Representative converts the RRE ID, the RRE ID will be reset to their prior status
 - Status relates to where the RRE ID is in the Account Setup process (Test or Production)
- RREs that never had a file submission status will be placed in test status because they initially registered as DDE
- RREs that originally selected file submission will be reset to their prior status
 - Example: RRE that was in Test status before switching to DDE will be placed back into Test status

Slide notes

Once the EDI Representative converts the RRE ID, the RRE ID will be reset to their prior status. The status of the RRE ID relates to where the RRE ID is in the Account Setup process.

An RRE ID can be in a “Test” or “Production” status. RREs that never had a file submission status will be automatically placed in a Test status because they initially registered as DDE.

RREs that had originally selected a file submission method prior to converting to DDE will be reset to their prior status under the file submission method.

For example, an RRE that was in a Test status when they were setup for a file submission method will be placed back into a Test status since testing is required for file submission methods.

Slide 19 of 24 - Switching to File Submission from DDE

Switching to File Submission from DDE Submission Period

- Newly registered RREs that chose DDE and later switch to a file submission method will be assigned a new submission period
- RREs that switch from a file submission to DDE and switch back to a file submission
 - Assigned same period as when the RRE was converted back to file submission
 - Example: RRE converts to a file submission on January 10th is assigned a submission period of Group 2

Dates	1st Month	2nd Month	3rd Month
01 - 07	Group 1	Group 5	Group 9
08 - 14	Group 2	Group 6	Group 10
15 - 21	Group 3	Group 7	Group 11
22 - 28	Group 4	Group 8	Group 12

Slide notes

Newly registered RREs that chose DDE as their original data submission method and later switch to a file submission method will be assigned a new submission period.

RREs that switch from a file submission to DDE and switch back to a file submission will be assigned the same period as when the RRE was converted back to file submission.

For example, an RRE converting to a file submission on January 10th, will be assigned that submission period which is Group 2.

Slide 20 of 24 - Switching to File Submission from DDE

Switching to File Submission from DDE Submission Period

- Once a file submission period is set
 - Quarterly reporting will commence the following quarter per the requirements in the NGHP User Guide Technical Information Chapter

Slide notes

Once a file submission period is set for an RRE ID, quarterly reporting will commence the following quarter per the requirements set forth in the NGHP User Guide Technical Information Chapter.

Slide 21 of 24 - Switching to File Submission from DDE

Switching to File Submission from DDE Maintaining Records Accepted via DDE

- RREs will have to maintain their previously accepted DDE claim reports using their file submission
 - Submit any changes as an Update or Delete Record on RREs file submission
- RRE cannot use DDE to maintain any claim reports previously reported under DDE after switching to file submission
- RRE can only use one method to submit claim information
- RRE IDs that switch to a file submission method will no longer have access to DDE

Slide notes

RREs that convert from the DDE submission method to a file submission method will have to maintain their previously accepted DDE claim reports outside of the Section 111 COBSW.

Any changes to these DDE claim reports must be submitted using an Update or Delete Record on the RREs file submission.

Once an RRE has switched from DDE to a file submission method, the RRE cannot use DDE to maintain any claim reports previously reported under DDE. RREs can only use one method to submit claim information.

If an RRE ID switches to a file submission method, DDE will no longer be accessible for that RRE ID.

Slide 22 of 24 - Course Summary

Course Summary

- Switching to DDE from a File Submission Method
- Switching from DDE to a File Submission Method



* Direct Data Entry is only available for NGHPs at this time



Slide notes

This course explained the process a Non-Group Health Plan (NGHP) Responsible Reporting Entity (RRE) must follow when switching to Direct Data Entry (DDE) from a file submission method, explained how an NGHP RRE can switch to a file submission method from DDE, and included general information regarding these methods.

Slide 23 of 24 - Conclusion




You have completed the Switching To or From Direct Data Entry (DDE) course. Detailed information on the DDE option can be found in the Section 111 COBSW User Guide available for download after login at:
<http://go.cms.gov/mirnghp>.

Slide notes

You have completed the Switching To or From Direct Data Entry (DDE) course. Detailed information on the DDE option can be found in the Section 111 COBSW User Guide available for download after login at the following link: <http://go.cms.gov/mirnghp>.

Slide 24 of 24 - NGHP Training Survey



If you have any questions or feedback on this material,
please go the following URL:
<https://www.surveymonkey.com/s/NGHPTraining>.

Slide notes

If you have any questions or feedback on this material, please go the following URL:
<https://www.surveymonkey.com/s/NGHPTraining>.