



Office of Financial Management/Financial Services Group

February 11, 2011

Implementation of Medicare Secondary Payer Mandatory Reporting Provisions in Section 111 of the Medicare, Medicaid, and SCHIP Extension Act of 2007

(See 42 U.S.C. 1395y(b)(7) & (8))

ALERT: Group Health Plan (GHP) – Beneficiary Lookup Online Query Capability for Responsible Reporting Entities (RREs)

This ALERT provides information related to a new, online, real-time query capability being offered on the Section 111 Coordination of Benefits Secure Website (COBSW). The new Beneficiary Lookup action will provide a response as to whether information supplied for a covered individual can be matched to a Medicare beneficiary. This online query capability will be available on March 1, 2011 and may be used to assist with reporting Group Health Plan (GHP) information mandated by Section 111 of the MMSEA. It will *replace* the functionality currently offered to Section 111 GHP RREs using the Beneficiary Automated Status and Inquiry System (BASIS).

GHP RREs that are in a production status will have the new action (Beneficiary Lookup) available on the RRE Listing page after logging on to the Section 111 COBSW (www.section111.cms.hhs.gov). The Beneficiary Lookup will utilize the same matching criteria and methodology as used for the Query Only Input File and the MSP Input File.

To use the Beneficiary Lookup action:

- Log on to the Section 111 COBSW
- The RRE Listing page will display
- Click on the Actions drop-down box for the RRE ID under which you wish to query
- Select the Beneficiary Lookup action from the list and click on the Go button
- The Beneficiary Lookup page will display
- On the Beneficiary Lookup page, enter the following required information
 - HICN or SSN
 - Covered Individual First Name
 - Covered Individual Last Name
 - Covered Individual Date of Birth
 - Covered Individual Gender
- Click on the Next button
- The system will attempt to match the information submitted to a Medicare beneficiary. First, an exact match on the HICN or SSN must be found. If both the HICN and SSN are supplied for the matching, only the HICN will be used. Then at least three out of the four remaining criteria must be matched exactly. (Only the first letter of the first name and first six letters of the last name will be used.)
- The Beneficiary Lookup Response page will then display the following:
 - If the information entered was matched to a Medicare beneficiary, a message will show indicating a match was found and the following data elements will display
 - Current HICN Medicare has on file for the beneficiary

- SSN supplied by the user, if applicable
 - Current First Name Medicare has on file for the beneficiary
 - Current Last Name Medicare has on file for the beneficiary
 - Current Date of Birth Medicare has on file for the beneficiary
 - Current Gender Medicare has on file for the beneficiary
 - Current Medicare Part A Effective Date
 - 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
 - Medicare Beneficiary Date of Death (if applicable)
- If the information entered cannot be matched to a Medicare beneficiary, a message will indicate that no match was found. The information entered for the query will redisplay, but no information will be returned indicating why a match was not found.

IMPORTANT: RREs are limited to 100 query requests per RRE ID per calendar month using the Beneficiary Lookup on the COBSW. Each month the system will display a count of the remaining queries left, and will reset this count up to 100 on the first day of each succeeding calendar month. Each query submitted using the Beneficiary Lookup will count toward this limit of 100 per month, regardless of whether or not a match was found.

NOTE: The Beneficiary Lookup function will be displayed on the action list of the RRE Listing page prior to March 1, 2011, but it is not operational until March 1, 2011. The transaction count will show zero, and will not be set to 100 until March 1, 2011.

Important Considerations:

- The effective date the Beneficiary Lookup action on the RRE Listing page of the Section 111 COBSW (www.section111.cms.hhs.gov) is **March 1, 2011**.
- Use of the Beneficiary Lookup action is limited to that prescribed by the Section 111 Data Use Agreement as documented in the User Guide and agreed to by the RRE's Authorized Representative on the signed Profile Report as well as by each user of the Section 111 COBSW.
- The Beneficiary Lookup action will only be available for RRE IDs in a production status.
- All users associated to the RRE ID (Account Manager and Account Designees) will be able to use the Beneficiary Lookup function.
- RREs are limited to 100 online query transactions using the Beneficiary Lookup action per RRE ID per month.
- Use of the Beneficiary Lookup action is optional. It will be offered under all GHP RRE IDs. No special application or sign-up is required.
- RREs using the Beneficiary Lookup action may continue to submit the Query Only Input File, as documented in the User Guide.
- The Section 111 GHP User Guide and the Section 111 COBSW User Guide will be updated to include this information.