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

Beneficiary Lookup

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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.

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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: <http://go.cms.gov/mirnghp>.

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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.

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.

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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 Web site (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.

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Query Request Limit

500 query request per RRE ID per calendar month

The screenshot shows a web interface for a beneficiary lookup. At the top, it says "Beneficiary Lookup Response". Below that, there is a message: "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." To the right of this message, there is a "QUICK HELP" button and a link "Help About This Page". Below that, there is a "Transactions Remaining" button showing the number "469". On the left side, there is a table of beneficiary information:

HICN	XXXXXXXXXX
First Name	XXXXXXXXXX
Middle Initial	
Last Name	XXXXXXXXXX
Gender	FEMALE
Date of Birth	XXXXXXXXXX

At the bottom left, there are three buttons: "Prev", "Cancel", and "Next". At the bottom right, there is a "Print this page" button.

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.

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.

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

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RRE Listing Page

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

RRE Listing
 [Print this page](#)

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 RRE ID 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.

One item found: 1

RRE ID	Name	Status	Submission Period	Reporting Option	Actions
#####	AAAAAAAAAAAA	Setup		Basic	<input type="button" value="Please Select"/> <input type="button" value="Go"/>
#####	AAAAAAAAAAAA	PROD	05	Basic	<input type="button" value="Please Select"/> <input type="button" value="Go"/>
#####	AAAAAAAAAAAA	PROD	09	Expanded	<input type="button" value="Please Select"/> <input type="button" value="Go"/>
#####	AAAAAAAAAAAA	PROD	0	DDE	<input type="button" value="Please Select"/> <input type="button" value="Go"/>
#####	AAAAAAAAAAAA	PROD	05	Basic	<input type="button" value="Please Select"/> <input type="button" value="Go"/>
#####	AAAAAAAAAAAA	PROD	09	Expanded	<input type="button" value="Please Select"/> <input type="button" value="Go"/>
#####	AAAAAAAAAAAA	PROD	0	DDE	<input type="button" value="Please Select"/> <input type="button" value="Go"/>

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

I'd like to...

[Manage Personal Information](#)

[Change Password](#)

[Log off](#)

Slide notes

In order to access the Beneficiary Lookup action, users must first successfully login to the Section 111 COBSW (<https://www.cob.cms.hhs.gov/Section111>). 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 you wish to query. The user will then select the Beneficiary Lookup action from the list and click on the Go button.

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Beneficiary Lookup Page

Beneficiary Lookup

[QUICK HELP](#)
[Help About This Page](#)

[Transactions Remaining](#)
92

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*

Insured Party*

HICN (12 characters max.)

OR

SSN (9 digits)

First Name*, Middle Initial, Last Name* T

Gender* Female Male

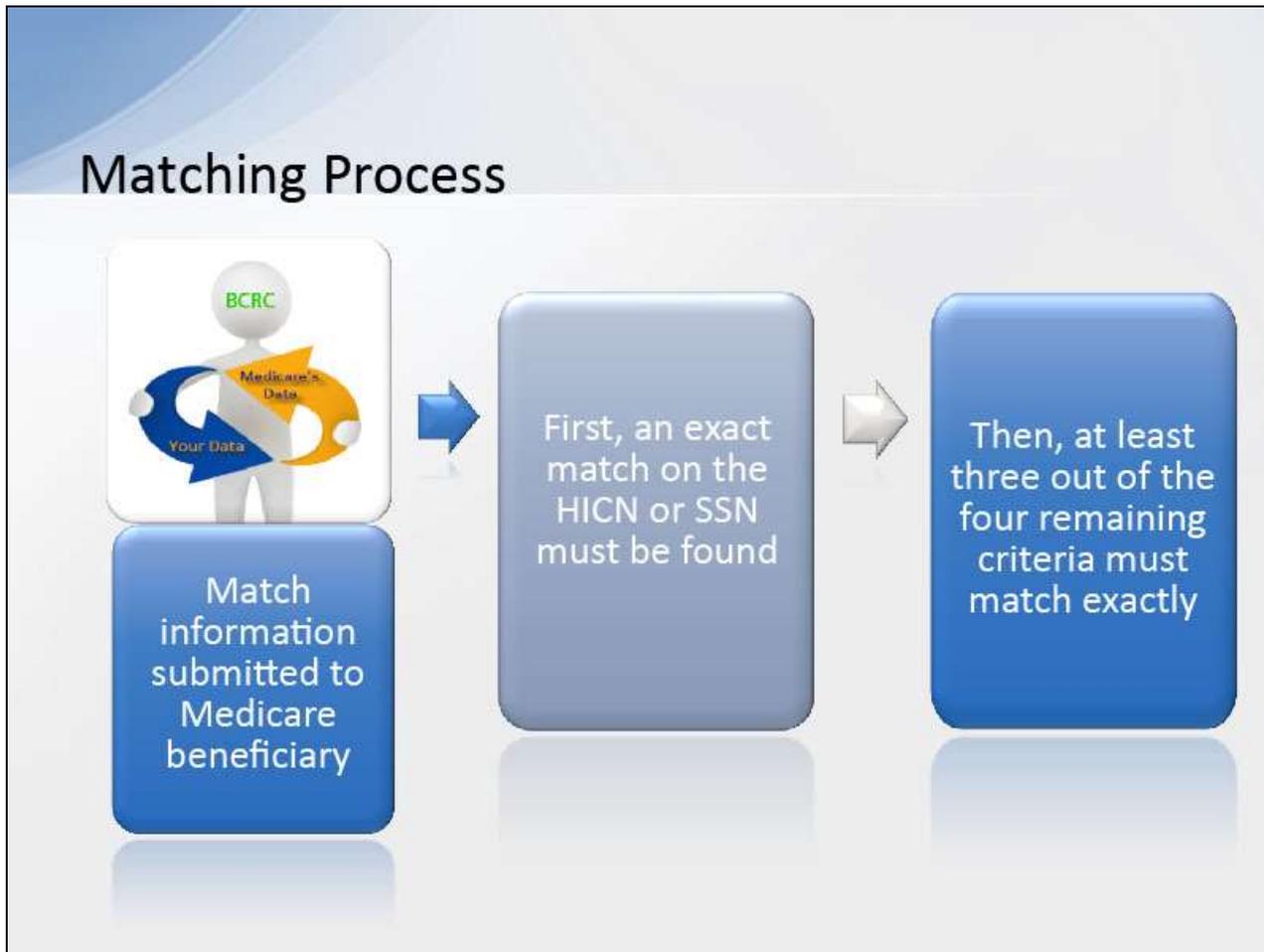
Date of Birth* / / (MM/DD/YYYY)

Slide notes

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

Enter the following required information: Injured Party's Health Insurance Claim Number (HICN) or Social Security Number (SSN), First Name, Last Name, Gender and Date of Birth. Then click on the Next button.

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

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.

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Match Found

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.

HICN	
First Name	
Middle Initial	
Last Name	
Gender	
Date of Birth	

 [Print this page](#)

Slide notes

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

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

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The screenshot shows a web application interface with a blue header and a navigation menu. The main content area displays a 'No Match Found' message. The message text reads: '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 table of input fields: Add Date (09/15/2011), HICN, SSN, First Name, Middle Initial, Last Name, Gender, and Date of Birth. The last four fields are redacted with black bars. At the bottom of the table are buttons for 'Prev', 'Cancel', and 'Next'. To the right of the table is a 'Print this page' link. On the right side of the page, there are two boxes: 'QUICK HELP Help About This Page' and 'Transactions Remaining 92'.

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 redisplay, but no information will be returned indicating why a match was not found.

If the Beneficiary Not Found page displays, 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.

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You have completed the Beneficiary Lookup course. Information in this presentation can be referenced by using the Liability Insurance (Including Self-Insurance), No-Fault Insurance and Workers' Compensation User Guide's table of contents and any subsequent alerts. These documents are available for download at the following link: <http://go.cms.gov/mirnghp>.

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

Slide notes

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