| CMS Manual System | Department of Health & Human Services (DHHS) |
|---|---|
| Pub 100-09 Medicare Contractor Beneficiary and Provider Communications | Centers for Medicare & Medicaid Services (CMS) |
| **Transmittal 12172** | **Date: August 3, 2023** |
| | **Change Request 13293** |

**SUBJECT: Updates to Pub. 100-09, Chapter 6 Beneficiary and Provider Communications Manual, Chapter 6, Provider Customer Service Program**

**I. SUMMARY OF CHANGES:** The purpose of this Change Request (CR) is to revise IOM Pub. 100-09 Chapter 6 and delete duplicate sections.

**EFFECTIVE DATE: September 4, 2023**
*Unless otherwise specified, the effective date is the date of service.*
**IMPLEMENTATION DATE: September 4, 2023**

***Disclaimer for manual changes only: The revision date and transmittal number apply only to red italicized material. Any other material was previously published and remains unchanged. However, if this revision contains a table of contents, you will receive the new/revised information only, and not the entire table of contents.***

**II. CHANGES IN MANUAL INSTRUCTIONS:** (N/A if manual is not updated)
R=REVISED, N=NEW, D=DELETED-*Only One Per Row.*

| R/N/D | CHAPTER / SECTION / SUBSECTION / TITLE |
|---|---|
| R | 6/Table of Contents |
| R | 6/30.4.2/Teletypewriter Lines |
| D | 6/30.4.9.1/CSR Sign-in Policy |
| D | 6/30.4.9.2/CSR Identification to Callers |
| R | 6/30.4.10.1/CSR Sign-in Policy |
| R | 6/30.4.11/Monitoring CSR Calls |
| D | 6/30.4.11.2/Quality Assurance Monitoring |
| N | 6/30.4.11.2/Remote Monitoring |
| D | 6/30.4.11.3/Remote Monitoring |
| D | 6/30.4.12.1/Telephone Response Quality Monitoring Program |
| D | 6/30.4.12.2/Telephone Responses to Provider Inquiries - QCM Program Minimum Requirements |
| D | 6/30.4.12.3/Recording Calls |
| D | 6/30.4.12.4/QCM Calibration |
| D | 6/50.2.4.5/Provider Claims Payment Alerts |
| D | 6/70.2.6/QAM (Telephone) Performance Standard |
| N | 6/70.4/Provider Outreach and Education Measurement |

## III. FUNDING:

### For Medicare Administrative Contractors (MACs):

The Medicare Administrative Contractor is hereby advised that this constitutes technical direction as defined in your contract. CMS does not construe this as a change to the MAC Statement of Work. The contractor is not obligated to incur costs in excess of the amounts allotted in your contract unless and until specifically authorized by the Contracting Officer. If the contractor considers anything provided, as described above, to be outside the current scope of work, the contractor shall withhold performance on the part(s) in question and immediately notify the Contracting Officer, in writing or by e-mail, and request formal directions regarding continued performance requirements.

## IV. ATTACHMENTS:

**Business Requirements**
**Manual Instruction**

# Attachment - Business Requirements

| Pub. 100-09 | Transmittal: 121712 | Date: August 3, 2023 | Change Request: 13293 |
|---|---|---|---|

**SUBJECT: Updates to Pub. 100-09, Chapter 6 Beneficiary and Provider Communications Manual, Chapter 6, Provider Customer Service Program**

**EFFECTIVE DATE:  September 4, 2023**
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**IMPLEMENTATION DATE:  September 4, 2023**

## I.    GENERAL INFORMATION

**A.    Background:**  The purpose of this Change Request (CR) is to update the Table of Contents, remove duplicate sections, remove quality assurance monitoring requirements, add language about 711 telecommunication services and add language about Provider Outreach and Education measurement.

**B.    Policy:**  MAC Provider Customer Service Program established by MMA

## II.    BUSINESS REQUIREMENTS TABLE

*"Shall" denotes a mandatory requirement, and "should" denotes an optional requirement.*

| Number | Requirement | Responsibility | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | | A/B MAC | | | DME MAC | Shared-System Maintainers | | | | Other |
| | | A | B | HHH | | FISS | MCS | VMS | CWF | |
| 13293.1 | MACs shall implement all requirements contained within Pub. 100-09, Chapter 6 Medicare Contractor Beneficiary and Provider Communications Manual. | X | X | X | X | | | | | |
| 13293.2 | MACs shall submit a transition plan for approval in order to use 711. (Section 30.4.2) | X | X | X | X | | | | | |
| 13293.3 | MACs shall provide CMS with access to their quality monitoring systems and notify us by emailing the provider services mailbox within 2 business days about any changes that will require us to update that access. (Section 30.4.11) | X | X | X | X | | | | | |
| 13293.4 | MACs shall maintain a POE Net Promoter Score of 65 and Likeliness to Return score of 4.7 for the evaluation period. (Section 70.4) | X | X | X | X | | | | | |

## III.    PROVIDER EDUCATION TABLE

| Number | Requirement | Responsibility | | | | |
|---|---|---|---|---|---|---|
| | | A/B MAC | | | DME MAC | CEDI |
| | | A | B | HHH | | |

| Number | Requirement | Responsibility | | | | |
|---|---|---|---|---|---|---|
| | | A/B MAC | | | D M E M A C | C E D I |
| | | A | B | H H H | | |
| | None | | | | | |

## IV.    SUPPORTING INFORMATION

**Section A:  Recommendations and supporting information associated with listed requirements:** N/A

*"Should" denotes a recommendation.*

| X-Ref Requirement Number | Recommendations or other supporting information: |
|---|---|
| | |

**Section B:  All other recommendations and supporting information:** N/A

## V. CONTACTS

**Post-Implementation Contact(s):** Contact your Contracting Officer's Representative (COR).

## VI. FUNDING

**Section A: For Medicare Administrative Contractors (MACs):**
The Medicare Administrative Contractor is hereby advised that this constitutes technical direction as defined in your contract. CMS does not construe this as a change to the MAC Statement of Work. The contractor is not obligated to incur costs in excess of the amounts allotted in your contract unless and until specifically authorized by the Contracting Officer. If the contractor considers anything provided, as described above, to be outside the current scope of work, the contractor shall withhold performance on the part(s) in question and immediately notify the Contracting Officer, in writing or by e-mail, and request formal directions regarding continued performance requirements.

**ATTACHMENTS: 0**

# Medicare Administrative Contractor (MAC) Beneficiary and Provider Communications Manual

## Chapter 6 - Provider Customer Service Program

**Table of Contents**
*(Rev.12172; Issued: 08-03-2023)*

## 30.4.2 - Teletypewriter Lines
*(Rev. 12172; Issued: 08-03-23; Effective: 09-04-23; Implementation: 09-04-23)*

In accordance with Section 504 of the Rehabilitation Act of 1973 and the Workforce Investment Act of 1998, all PCCs shall provide the ability for deaf, hard-of-hearing, or speech-impaired providers to communicate via Teletypewriter (TTY) equipment *or through 711 as a Telecommunications Relay Service*.

A TTY is a special device permitting deaf, hard-of-hearing, or speech-impaired individuals to use the telephone by allowing them to type messages back and forth to one another instead of talking and listening. A TTY is required at both ends of the conversation in order to communicate. MACs shall publicize the TTY line on their provider education websites. This TTY shall also be available for complex beneficiary inquiries. *711 is a service that helps people with hearing or speech disabilities to communicate through the telephone.*

*To use 711, submit a transition plan to the <u>service reports mailbox</u> for approval. Once approved, you can disconnect your TTY line and instruct providers to use 711 to reach your contact center.*

*Your transition plan must include a targeted launch date and, at a minimum, how you'll:*
- *Test the connection between 711 and your contact center to complete a transaction with a CSR*
- *Work with the PNS contractor to coordinate disconnecting your current TTY toll-free number*
- *Train your CSRs to handle a 711 assisted call*
- *Provide instructions on your website explaining how to use 711 to reach your contact center (including what information callers should have available)*
- *Remove all references to your TTY toll-free number (for example, from any letterhead or templates)*

*If you're using 711 report zeros (0) in the "Number of Attempts (TTY/TDD)" and "Number of Failed Attempts (TTY/TDD)" fields in PIES. You'll include these calls when you report on the toll-free line the 711 call came through.*

## 30.4.10.1 – *CSR Sign-in Policy*
*(Rev. 12172; Issued: 08-03-23; Effective: 09-04-23; Implementation: 09-04-23)*

MACs shall establish and follow a standard telephone CSR sign-in policy that contains the following:

- CSRs available to answer telephone inquiries shall sign in to the telephone system to begin data collection.

- CSRs shall sign off the telephone system for breaks, lunch, training, and when performing any other non-telephone inquiry workload. (Note: If the telephone system supports an additional CSR category that accumulates this non-telephone inquiry performance data so it can be separated and not have any impact on the measurements

CMS wants to collect, this category may be utilized in lieu of CSRs signing-off the system).

- CSRs shall sign off the telephone system at the end of their workday.

## 30.4.11 - Monitoring CSR Calls
*(Rev. 12172; Issued: 08-03-23; Effective: 09-04-23; Implementation: 09-04-23)*

CMS has *two* monitoring programs to ensure quality responses to calls from providers: (1) Quality Call Monitoring (QCM) and (*2*) remote monitoring. Monitoring the accuracy, completeness, adherence to the Privacy Act, and professionalism of telephone CSR-handled calls leads to improved customer satisfaction and reduce the number of calls to the PCCs. *MACs shall provide CMS with access to their quality monitoring systems (such as NICE, QFiniti and Verint) and notify us by emailing the provider services mailbox within 2 business days about any changes that will require us to update that access.*

As MACs are ultimately responsible for their responses to provider telephone inquiries, MACs shall use monitoring results to identify and act upon areas of needed improvement, both for the PCC as a whole and for individual telephone CSRs. MACs shall document the actions, to include corrective action plans, as applicable, they take to improve CSR-handled calls if CMS monitoring, or their own monitoring, indicates improvements are recommended or required. MACs shall provide such information to CMS upon request.

CMS will provide MACs with feedback about monitoring and information about the evaluation processes used through the PCUG electronic mailing list and regularly scheduled meetings.

## 30.4.11.2 – Remote Monitoring
*(Rev. 12172; Issued: 08-03-23; Effective: 09-04-23; Implementation: 09-04-23)*

MACs shall maintain the ability for CMS to remotely monitor live provider calls in their entirety by specific workstation (CSR), next call from the network or next call from the telephone CSR queue, or specific business line. MACs shall make remote monitoring instructions, access codes, and telephone CSR IDs available to CMS upon request. CMS will take reasonable measures to ensure the security of this access (for example, passwords will be controlled by one person).

## 70.4 – Provider Outreach and Education Measurement
*(Rev. 12172; Issued: 08-03-23; Effective: 09-04-23; Implementation: 09-04-23)*

*Providers rely on POE education to be presented with clarity by knowledgeable staff. MACs should offer education that providers consistently value and would recommend to their colleagues as their first choice to get reliable information.*

*POE provided by MACs shall be reviewed throughout the contract year for each jurisdiction. Scores are assessed during the evaluation period using results from the MCE survey. For the evaluation period, MACs shall maintain a*
- *POE Net Promoter Score (NPS) of 65*

- *Likeliness to Return score of 4.7*

*The Net Promoter Score is a nationally used tool to measure customer experience and to predict its growth. The Likeliness to Return evaluates the confidence providers have in the delivery of the education and its beneficial content.*

*All scores are derived from the Shared Dashboard within the Survey Contractor Platform.*