

CMS Manual System	Department of Health & Human Services (DHHS)
Pub 100-20 One-Time Notification	Centers for Medicare & Medicaid Services (CMS)
Transmittal 12858	Date: September 27, 2024
	Change Request 13754

SUBJECT: Disable Beneficiary Eligibility Information from Medicare Administrative Contractor (MAC) Interactive Voice Response (IVR) Systems

I. SUMMARY OF CHANGES: The purpose of this Change Request (CR) is to direct MACs to disable beneficiary eligibility information from their Interactive Voice Response (IVR) systems by March 31, 2025.

EFFECTIVE DATE: March 31, 2025

**Unless otherwise specified, the effective date is the date of service.*

IMPLEMENTATION DATE: October 21, 2024 - for business requirement 13754.2; March 31, 2025 - For all other business requirements

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
N/A	N/A

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:

One Time Notification

Attachment - One-Time Notification

Pub. 100-20	Transmittal: 12858	Date: September 27, 2024	Change Request: 13754
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I. SUMMARY OF CHANGES:

The purpose of this Change Request (CR) is to direct MACs to disable beneficiary eligibility information from their Interactive Voice Response (IVR) systems by March 31, 2025.

II. GENERAL INFORMATION

A. Background:

To protect beneficiaries from Medicare fraud, CMS is directing MACs to disable beneficiary eligibility information from your IVR systems by March 31, 2025. Disable means eligibility is inaccessible to callers but not removed from your system. This is a pilot involving most MACs.

Once disabled, providers and suppliers must check beneficiary eligibility through these online tools and services only:

- MAC secure online provider portal
- Billing agencies, clearinghouses, or software vendors
- Health Insurance Portability and Accountability Act (HIPAA) Eligibility Transaction System (HETS)

In the event the pilot is discontinued, MACs need to be prepared to quickly reenable this functionality.

When the pilot is complete, CMS will:

- Instruct MACs to remove this functionality entirely from your IVR systems
- Update appropriate sections in:
 - Internet-Only Manual (IOM)
 - Statements of Work (SOW)
 - Disclosure Desktop Reference (DDR) guide
 - Provider Inquiries Evaluation System (PIES) reporting
 - Provider Customer Service Program (PCSP) Contractor Information Database (PCID)

CMS will monitor the impact this change has on MAC Customer Experience (MCE) IVR and Customer Service Representative (CSR) surveys, but doesn't intend to adjust scoring minimums or exclude responses from satisfaction scores.

B. Policy: N/A

III. 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	HH H		FIS S	MC S	VM S	CW F	
13754.1	Contractors shall disable beneficiary eligibility functionality from your IVR by March 31, 2025.									J15 A/B MAC, J5 A/B MAC, J6 A/B MAC, J8 A/B MAC, JA DME MAC, JB DME MAC, JC DME MAC, JD DME MAC, JE A/B MAC, JF A/B MAC, JJ A/B MAC, JK A/B MAC, JK HHH MAC, JM A/B MAC, RRB- SMA C
13754.1. 1	Contractors shall remove eligibility from your IVR menu or return a message that IVR eligibility is no longer available when the									J15 A/B MAC, J5 A/B MAC,

Number	Requirement	Responsibility								
		A/B MAC			DME MA C	Shared-System Maintainers				Other
		A	B	HH H		FIS S	MC S	VM S	CW F	
	eligibility IVR menu option is selected. Don't reorganize your IVR menu: if eligibility was option 2, don't move a different functionality to 2.									J6 A/B MAC, J8 A/B MAC, JA DME MAC, JB DME MAC, JC DME MAC, JD DME MAC, JE A/B MAC, JF A/B MAC, JJ A/B MAC, JK A/B MAC, JK HHH MAC, JM A/B MAC, RRB-SMA C
13754.1.2	Contractors shall create a process to reenable beneficiary eligibility functionality on your IVR, if directed by CMS to do so, within three (3) business days.									J15 A/B MAC, J5 A/B MAC, J6 A/B MAC, J8 A/B MAC, JA DME MAC, JB DME

Number	Requirement	Responsibility								
		A/B MAC			DME MA C	Shared-System Maintainers				Other
		A	B	HH H		FIS S	MC S	VM S	CW F	
										MAC, JC DME MAC, JD DME MAC, JE A/B MAC, JF A/B MAC, JJ A/B MAC, JK A/B MAC, JK HHH MAC, JM A/B MAC, RRB- SMA C
13754.2	<p>Within 15 business days after issuance of this CR, contractors shall email ServiceReports@cms.hhs.gov and CC your PCSP Business Function Lead (BFL) your plan to implement this CR for CMS review and approval. The plan shall, at minimum, include dates for when you'll:</p> <ul style="list-style-type: none"> • Begin each educational business requirement • Disable beneficiary eligibility functionality from your IVR 									J15 A/B MAC, J5 A/B MAC, J6 A/B MAC, J8 A/B MAC, JA DME MAC, JB DME MAC, JC DME MAC, JD DME MAC, JE A/B

Number	Requirement	Responsibility								
		A/B MAC			DME MA C	Shared-System Maintainers				Other
		A	B	HH H		FIS S	MC S	VM S	CW F	
	If you intend to use a phased implementation, your plan shall include the details and corresponding dates for each phase.									MAC, JF A/B MAC, JJ A/B MAC, JK A/B MAC, JK HHH MAC, JM A/B MAC, RRB- SMA C
13754.2. 1	Contractors shall educate providers and suppliers about this change and other online tools and services to get eligibility information.									J15 A/B MAC, J5 A/B MAC, J6 A/B MAC, J8 A/B MAC, JA DME MAC, JB DME MAC, JC DME MAC, JD DME MAC, JE A/B MAC, JF A/B MAC, JJ A/B MAC, JK A/B MAC,

Number	Requirement	Responsibility								
		A/B MAC			DME MA C	Shared-System Maintainers				Other
		A	B	HH H		FIS S	MC S	VM S	CW F	
										JK HHH MAC, JM A/B MAC, RRB- SMA C
13754.2. 2	Contractors shall message on your IVR or IVR/CSR combined lines that beneficiary eligibility information will no longer be available on the IVR after your planned implementation date.									J15 A/B MAC, J5 A/B MAC, J6 A/B MAC, J8 A/B MAC, JA DME MAC, JB DME MAC, JC DME MAC, JD DME MAC, JE A/B MAC, JF A/B MAC, JJ A/B MAC, JK A/B MAC, JK HHH MAC, JM A/B MAC, RRB- SMA C

Number	Requirement	Responsibility								
		A/B MAC			DME MA C	Shared-System Maintainers				Other
		A	B	HH H		FIS S	MC S	VM S	CW F	
13754.2. 3	Contractors shall message on your website that beneficiary eligibility information will no longer be available on the IVR after your planned implementation date.									J15 A/B MAC, J5 A/B MAC, J6 A/B MAC, J8 A/B MAC, JA DME MAC, JB DME MAC, JC DME MAC, JD DME MAC, JE A/B MAC, JF A/B MAC, JJ A/B MAC, JK A/B MAC, JK HHH MAC, JM A/B MAC, RRB- SMA C
13754.2. 4	Contractors shall provide scripts for your CSRs to explain how callers can get beneficiary eligibility information through online tools and services.									J15 A/B MAC, J5 A/B MAC, J6 A/B MAC, J8 A/B MAC,

Number	Requirement	Responsibility								
		A/B MAC			DME MA C	Shared-System Maintainers				Other
		A	B	HH H		FIS S	MC S	VM S	CW F	
										JA DME MAC, JB DME MAC, JC DME MAC, JD DME MAC, JE A/B MAC, JF A/B MAC, JJ A/B MAC, JK A/B MAC, JK HHH MAC, JM A/B MAC, RRB- SMA C
13754.2. 5	Contractors shall identify heavy users of this functionality and educate them about alternative ways to obtain beneficiary eligibility information.									J15 A/B MAC, J5 A/B MAC, J6 A/B MAC, J8 A/B MAC, JA DME MAC, JB DME MAC, JC DME MAC,

Number	Requirement	Responsibility								
		A/B MAC			DME MA C	Shared-System Maintainers				Other
		A	B	HH H		FIS S	MC S	VM S	CW F	
										JD DME MAC, JE A/B MAC, JF A/B MAC, JJ A/B MAC, JK A/B MAC, JK HHH MAC, JM A/B MAC, RRB- SMA C
13754.2. 6	Contractors shall update IVR guides to reflect the changes you make to your IVR.									J15 A/B MAC, J5 A/B MAC, J6 A/B MAC, J8 A/B MAC, JA DME MAC, JB DME MAC, JC DME MAC, JD DME MAC, JE A/B MAC, JF A/B MAC,

Number	Requirement	Responsibility								
		A/B MAC			DME MA C	Shared-System Maintainers				Other
		A	B	HH H		FIS S	MC S	VM S	CW F	
										JJ A/B MAC, JK A/B MAC, JK HHH MAC, JM A/B MAC, RRB- SMA C
13754.2. 7	Contractors shall keep your PCSP BFL updated with how your work is progressing compared to your approved plan.									J15 A/B MAC, J5 A/B MAC, J6 A/B MAC, J8 A/B MAC, JA DME MAC, JB DME MAC, JC DME MAC, JD DME MAC, JE A/B MAC, JF A/B MAC, JJ A/B MAC, JK A/B MAC, JK HHH MAC, JM

Number	Requirement	Responsibility								
		A/B MAC			DME MA C	Shared-System Maintainers				Other
		A	B	HH H		FIS S	MC S	VM S	CW F	
										A/B MAC, RRB- SMA C
13754.3	Contractors shall continue to report 'Eligibility IVR Transactions' in PIES even if zero (0).									J15 A/B MAC, J5 A/B MAC, J6 A/B MAC, J8 A/B MAC, JA DME MAC, JB DME MAC, JC DME MAC, JD DME MAC, JE A/B MAC, JF A/B MAC, JJ A/B MAC, JK A/B MAC, JK HHH MAC, JM A/B MAC, RRB- SMA C
13754.4	Contractors shall log a call as "Temporary Issue: Removal of Beneficiary Eligibility Information from IVR" for									J15 A/B MAC, J5 A/B

Number	Requirement	Responsibility								
		A/B MAC			DME MA C	Shared-System Maintainers				Other
		A	B	HH H		FIS S	MC S	VM S	CW F	
	PCID Inquiry Tracking reporting if a CSR instructs a caller to obtain eligibility information through an online tool or service.									MAC, J6 A/B MAC, J8 A/B MAC, JA DME MAC, JB DME MAC, JC DME MAC, JD DME MAC, JE A/B MAC, JF A/B MAC, JJ A/B MAC, JK A/B MAC, JK HHH MAC, JM A/B MAC, RRB- SMA C

IV. PROVIDER EDUCATION TABLE

Number	Requirement	Responsibility				
		A/B MAC			DME MAC	CEDI
		A	B	HHH		
13754.5	CR as Provider Education: MACs shall use the content in the CR to develop relevant education material. Provide a link to the entire instruction in the education content. You can also supplement with local information that would help your provider community bill and administer the Medicare Program correctly.	X	X	X	X	

V. 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

VI. CONTACTS

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

VII. 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