

HIPAA Version 5010: Fourteenth National Provider Call -Errata and The Medicare Fee-For Service Companion Guide

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Purpose of Today's Call

1. To highlight the transactions modified by the errata
2. To emphasize important testing phases dates
3. To provide an overview on Medicare Fee-For-Service'(FFS) HIPAA version 5010 companion guide
4. To provide guidance on what to do to prepare for the 5010 transition
5. To solicit feedback from participants regarding questions and concerns with 5010 and/or Medicare FFS' implementation of 5010

Today's Agenda

- General overview
- Errata vs. base version transactions
- Scope of the Medicare Fee-For-Service companion guide
- Overview of the companion guide
- Trading Partners and Transaction Instructions components of the companion guide
- What you need to do to prepare for the 5010 transition
- Question & answer session

General Overview

Who needs to know about Medicare FFS' implementation of 5010/D.0?

- All Medicare FFS trading partners who are considered to be HIPAA covered entities, their business associates, and anyone expecting to implement ICD-10
 - Medicare FFS uses the term Trading Partner to designate one of two or more participants in an ongoing business relationship (e.g., provider, billing service, software vendor, clearinghouse, etc.)
- All Medicare FFS providers/suppliers should have the following staff engaged in transitioning to 5010
 - Practice leadership
 - Office and Practice Managers
 - IT and systems staff
- Software Vendors, Clearinghouses, Billing Services or any other entity that services Medicare FFS providers

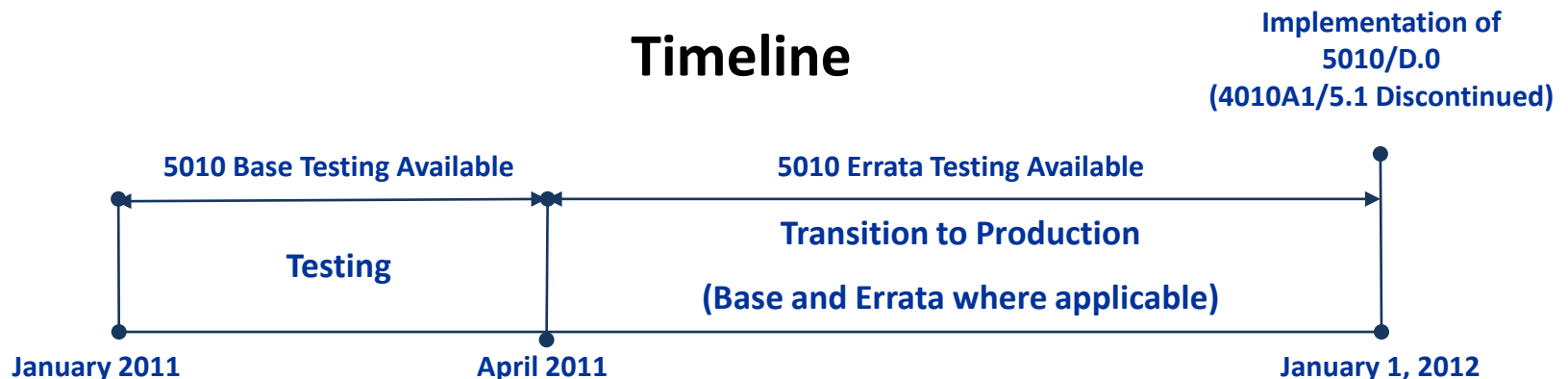
Medicare FFS Compliance Dates and Timelines

Compliance Dates for 5010 and D.0:

- Mandatory compliance on January 1, 2012 – all covered entities
 - Internal Testing to begin January 2010
 - External testing to begin January 2011

Important Errata Dates:

- Testing: Base versions in January 2011, Errata versions in April 2011
- Production: Successfully tested errata versions in production as early as April 2011



5010/D.0 Errata and Medicare FFS' Approach

- Federal Register Notice Published October 13, 2010
 - (Vol. 75, No. 197, October 13, 2010, 62684–62686 [2010–25684] found at <http://edocket.access.gpo.gov/2010/pdf/2010-25684.pdf>)
- Compliance dates remain the same for HIPAA 5010/D.0
- Medicare FFS Companion Guides will include the Errata
 - Companion Guides coming in February 2011
- Transactions impacted by Errata include:

| Transactions | Base Version | Errata Version |
|---|--------------|----------------|
| 270/ 271 Health Care Eligibility Benefit Inquiry and Response | 005010X279 | 005010X279A1 |
| 837 Health Care Claim: Professional | 005010X222 | 005010X222A1 |
| 837 Health Care Claim: Institutional | 005010X223A1 | 005010X223A2 |
| 999 Implementation Acknowledgment For Health Care Insurance | 005010X231 | 005010X231A1 |
| 835 Health Care Claim Payment/Advice | 005010X221 | 005010X221A1 |
| 276/277 Status Inquiry and Response | 005010X212 | N/A |
| 277CA Claim Acknowledgement | 005010X214 | N/A |
| National Council for Prescription Drug Programs (NCPDP) Version D.0 of the Telecom Standard | D.0 | D.0 April 2009 |

Links to the Edit Spreadsheets

| Transaction | URL Link |
|---------------------------|---|
| Professional Claim 837-P | http://www.cms.gov/MFFS5010D0/Downloads/ProfessionalClaim4010A1to5010.pdf |
| Institutional Claim 837-I | http://www.cms.gov/MFFS5010D0/Downloads/InstitutionalClaim4010A1to5010.pdf |
| Remittance 835 | http://www.cms.gov/MFFS5010D0/Downloads/Remittance4010A1to5010.pdf |
| Claim Status 276/277 | http://www.cms.gov/MFFS5010D0/Downloads/ClaimStatus4010A1to5010.pdf |
| Eligibility 270/271 | http://www.cms.gov/MFFS5010D0/Downloads/Eligibility4010A1to5010.pdf |
| NCPDP | http://www.cms.gov/MFFS5010D0/Downloads/NCPDP51toD0.pdf |

Purpose of Companion Guide

Purpose: To assist trading partners and their business associates with exchanging Professional and Institutional Claims, Claim Acknowledgments, Claim Remittance Advice, Claim Status Inquiry and Response, and Eligibility Inquiry and Response electronic transactions with Medicare; to provide information about the MACs EDI environment that the trading partners need in order to exchange EDI data with the MAC. Including:

- EDI Registration;
- Testing;
- Connectivity and Communications Support; and
- Technical instruction and specification for submission of electronic transactions

Who needs the companion guide?

- All Medicare FFS trading partners will need the companion guide

What is a trading partner?

An Electronic Data Interchange (EDI) Trading Partner is defined as any Medicare customer (Provider, Billing Service, Software Vendor, clearinghouse) that transmits to, or receives electronic data from, Medicare

5010/D.0 Companion Guides

- **Medicare will publish 5010/D.0 Companion Guides in February 2011 that will:**
 - Align with industry efforts to implement a standardized companion guide
 - Use current templates resulting from collaborations between WEDI, CAQH, and X12
 - Utilize a dynamic web-based structure to ensure accuracy and accessibility
 - Be standardized across all MACs to ensure consistent language and content

General Overview of the Companion Guide

The Companion Guide Provides:

- Communication, connectivity and transaction specific information to the trading partner

The Companion Guide includes such information as:

- EDI Enrollment and registration
- Testing and certification protocols
- Technical assistance via helpdesk, website, email list serve, newsletter
- Hours of operation
- General EDI customer service
- Information on transaction acknowledgements sent by Medicare

Companion Guide Content

The companion guide is comprised of the following sections:

1. Getting Started: Includes information related to system operating hours, provider data services, and audit procedures.
2. Testing and Certification Requirements: Includes detailed transaction testing information as well as certification requirements needed to complete transaction testing with Medicare.
3. Connectivity/Communications: Includes information on Medicare's transmission procedures as well as communication and security protocols.
4. Contact Information: Includes EDI customer service, EDI technical assistance, provider services and applicable web sites.
5. Control Segments/Envelopes: Contains information needed to create the ISA/IEA, GS/GE and ST/SE control segments.
6. Acknowledgments and Reports: Contains information on all transaction acknowledgments sent by Medicare and report inventory.
7. Additional Trading Partner Information: Contains information related to implementation checklist, transmission examples, Trading Partner Agreements and other resources.
8. Trading Partner Information Change Summary: Describes the differences between the current Companion Guide and the previous Companion Guide.
9. Appendices: Transaction Specific Information

Two Components of the Medicare FFS Companion Guide

- **Trading Partner (TP):**

The Trading Partner companion guide is published to convey the information needed to commence and maintain communication and the exchange information between the MAC and the trading partner

- **Transaction Instruction (TI):**

The Transaction Instruction component is used by the publishing entity to clarify the Technical Report Type 3 (TR3) for submission of specific electronic transactions

Trading Partner Component of the Medicare FFS Companion Guide

Provides:

- a standardized format across Medicare FFS MACs
- each MAC with the opportunity to publish their specific communication and connectivity protocols in their Medicare FFS companion guide
- multi-MAC trading partners will need to access each MAC's website for their specific protocols

Transaction Instruction Section of the Companion Guide

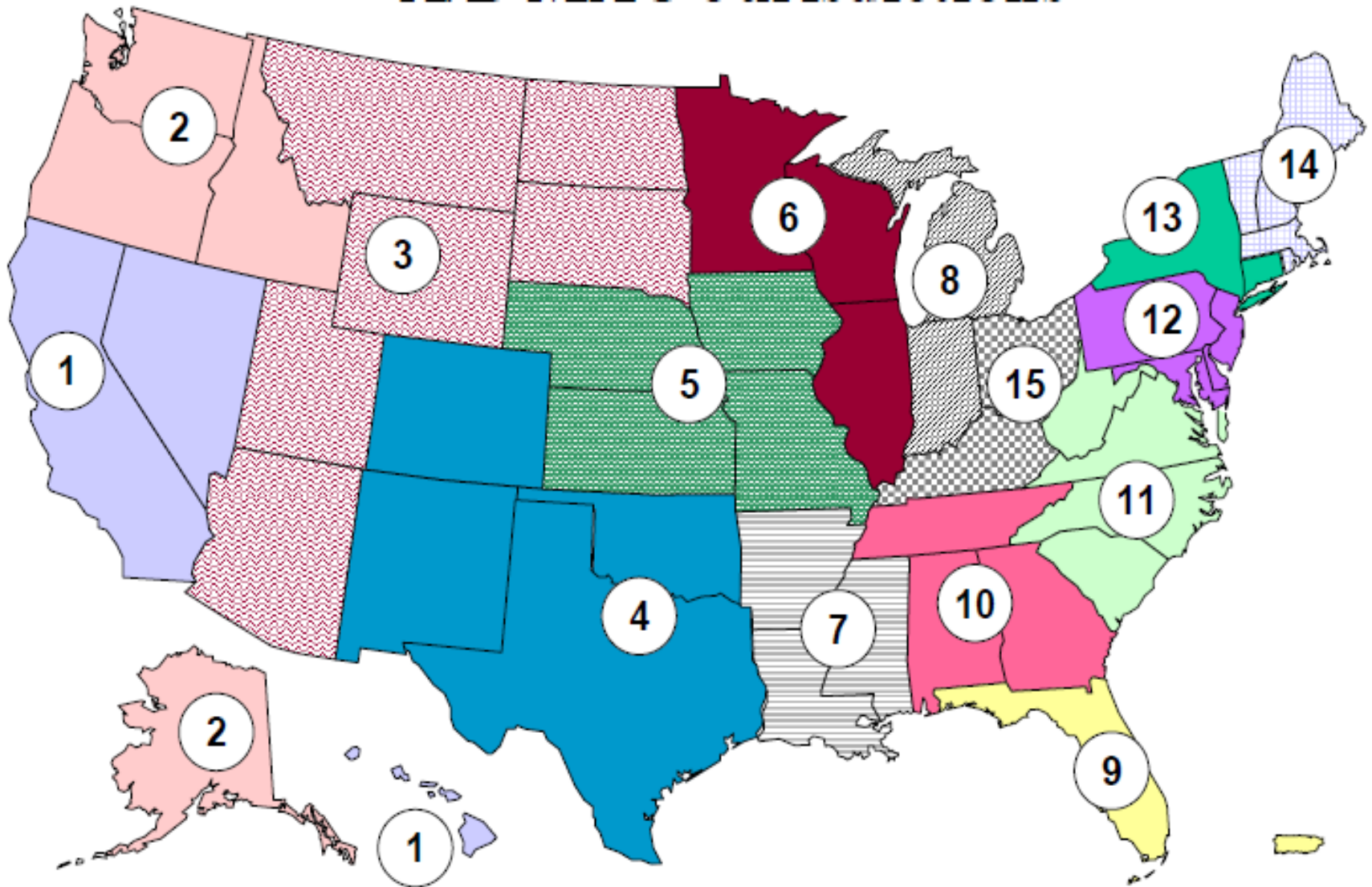
- The Transaction Instruction component of any companion guide must be used in conjunction with the associated ASC X12 TR3. The Medicare FFS TI provides more detailed requirements, when appropriate, related to the segments and data elements
- The standard template categorizes edit scenarios for easy reference
 - Example of a Sub-Section of 005010X223A2 Health Care Claim, Institutional Instruction Table:

| Loop ID | Reference | Name | Codes | Notes/Comments | Category |
|---------|--------------|---|-------|---|----------|
| 2000B | SBR01 | Payer Responsibility Sequence Number Code | P, S | The values accepted are "P" and "S". Submission of other values [will/may] cause your claim to reject. | 6 |
| 2000B | SBR02, SBR09 | Subscriber Information | | For Medicare, the subscriber is always the same as the patient (SBR02=18, SBR09=MA). The Patient Hierarchical Level (2000C loop) is not used. | 6 |
| 2010AA | REF | BILLING PROVIDER UPIN/LICENSE INFORMATION | | Must not be present (non-VA contractors). Submission of this segment [will/may] cause your claim to reject. | 4 |
| 2010AC | | PAY TO PLAN LOOP | | Must not be present. Submission of this loop [will/may] cause your claim to reject. | 4 |

Companion Guide Summary

- The companion guide provides technical and connectivity specification(s) for the following transactions:
 - 837 Health Care Claim: Institutional
 - 837 Health Care Claim: Professional
 - 835 Health Care Claim: Payment Advice
 - 276/277 Status Inquiry and Response
- The technical specifications for the acknowledgement transactions (999 and 277CA) are found in the TI for the 837 Institutional and Professional Claim transaction
- The 270/271 Health Care Eligibility Benefit Inquiry and Response has its own companion guide that can be found at:
<http://www.cms.gov/HETSHelp/>
- NCPDP Version D.0 also has its own companion guide that can be found at: <http://www.ngscedi.com/>

MAC Jurisdictions



Resources

Location of Medicare FFS companion guides

| Jurisdiction | Operational MACs | Companion Guides |
|--|---|--|
| 1 | Palmetto GBA | Part A: http://www.palmettogba.com/palmetto/providers.nsf/docsCat/Providers~Jurisdiction%201%20Part%20A~EDI~Technical%20Specifications?open&expand=1&navmenu=EDI Part B: http://www.palmettogba.com/palmetto/providers.nsf/docsCat/Providers~Jurisdiction%201%20Part%20B~EDI~Technical%20Specifications?open&expand=1&navmenu=EDI |
| 3 | Noridian Administrative Services, LLC | http://www.edissweb.com/cgp/vendors/index.html |
| 4 | Trailblazer Health Enterprises, LLC | http://www.trailblazerhealth.com/Electronic%20Data%20Interchange/Technical%20Specifications/Default.aspx?DomainID=1 |
| 5 | Wisconsin Physician Service Insurance Corporation | Part A: http://www.wpsic.com/edi/pdf/med_a_837i_companion.pdf Part B: http://www.wpsic.com/edi/pdf/med_b_837p_companion.pdf |
| 9 | First Coast Service Options, Inc. | http://medicare.fcso.com/Companion_documents/index.asp |
| 10 | Cahaba GBA | Part A: https://www.cahabagba.com/part_a/edi/documentation.htm Part B: https://www.cahabagba.com/part_b/edi/hipaa_n3_companion_documents.htm Home Health & Hospice: https://www.cahabagba.com/rhhi/edi/trans_formats.htm |
| 11 (Part A –NC & SC Part B–NC, SC, VA, WV) | Palmetto GBA | Part A: http://www.palmettogba.com/palmetto/providers.nsf/docsCat/Providers~Jurisdiction%2011%20Part%20A~EDI~Technical%20Specifications?open&expand=1&navmenu=EDI |
| 11 (Part A,VA & WV) | National Government Services | www.ngsmedicare.com |
| 12 | Highmark Medicare Services | https://www.highmarkmedicareservices.com/edi/index.html |
| 13 | National Government Services | www.ngsmedicare.com \electronic submissions\5010 Implementation |
| 14 | NHIC Corporation | Part A: http://www.medicarenhic.com/PA/PartA_edi_guides.shtml Part B: http://www.medicarenhic.com/ne_prov/edi_guides.shtml |
| CEDI for DME | National Government Services | http://www.ngscedi.com/TechnicalSpec/techindex.htm |

MAC EDI Helpdesks

Who should you contact to find out more about how Medicare FFS will implement 5010?

- Each Medicare FFS trading partner should be registered with an A/B MAC, FI, Carrier, or CEDI for DME. Your first source of Medicare information should come from your Medicare contractor
- The following links provides EDI help desk phone numbers for Part A and B/DME by State
 - Part A -
<http://www.cms.gov/ElectronicBillingEDITrans/Downloads/Medicare%20Part%20A%20EDI%20Helpline3.pdf>
 - Part B/DME -
<http://www.cms.gov/ElectronicBillingEDITrans/Downloads/Medicare%20Part%20B%20EDI%20Helpline3.pdf>

Medicare FFS

Communications To Date

- Establishment of central Version 5010 and D.0 webpage(s) on the CMS website (<http://www.cms.gov/Versions5010andD0/>)
- Development of resource materials – fact sheets, readiness checklists, resource card, FAQs, 4010 to 5010 side-by-sides, Medicare Learning Network (MLN) articles, and a series of presentations can be found at [http://www.cms.gov/Versions5010andD0/40 Educational Resources.asp#TopOfPage](http://www.cms.gov/Versions5010andD0/40_Educational_Resources.asp#TopOfPage)
- Delivery of a series of National Provider Calls – presentations, transcripts and audio files available at (<http://www.cms.gov/Versions5010andD0/V50/list.asp#TopOfPage>)
- List serve message(s) posted at ([http://www.cms.gov/Versions5010andD0/30 CMS Communications.asp#TopOfPage](http://www.cms.gov/Versions5010andD0/30_CMS_Communications.asp#TopOfPage))
 - To subscribe to the Medicare FFS provider list serves go to http://www.cms.gov/prospmedicarefeesvcpmtgen/downloads/Provider_Listservs.pdf and subscribe to the “All FFS Providers” list serve

Important Dates to Remember

| Dates | 5010/D.0 Event |
|--------------------|---|
| January 25-27 | 4 th WEDI 5010 and ICD10 Implementation Forums - Advancing Down the Implementation Highway: Moving Forward with Testing to Attain Implementation |
| February 20-24 | HIMSS 11 th Annual Conference & Exhibition |
| March 30 | 5010 National Call – Provider Testing and Readiness |
| April <i>TBD</i> | MAC Hosted Outreach and Education Session - Are You Ready to Test? |
| May 2-5 | 20 th Annual WEDI National Conference |
| May 25 | 5010 National Call – Topic TBD |
| June <i>TBD</i> | National MAC Testing Day (for Vendors, Clearinghouses, and Billing Services, etc) |
| July <i>TBD</i> | MAC Hosted Outreach and Education Session - Troubleshooting with your MAC |
| August 31 | 5010 National Call - MAC Panel |
| August <i>TBD</i> | National MAC Testing Day (For Providers) |
| October <i>TBD</i> | MAC Hosted Outreach and Education Session (Last push for late implementers) |
| October 24-27 | WEDI 2011 Fall Conference |
| December 31 | 5010 and D.0 only Production Environment |

What you need to do Next

1. Get familiar with basic requirements by compiling and reviewing relevant websites and resources (i.e. the Medicare FFS Companion Guide) – understand what you need to do
2. Contact your software vendor, clearinghouse, or billing service vendor and know where they stand
3. Contact your MAC(s) and inquire about their testing protocols – test early and test often
4. Plan to get engaged in Outreach and Education activities with your local MAC(s)
5. Look out for more communications from Medicare FFS and your MAC throughout 2011 and take action as needed
6. Seek technical support from your MAC earlier rather than later
7. Do not assume that someone else is taking care of this for you

Q & A Session

Now this is your opportunity to ask questions