CMS Manual System	Department of Health & Human Services (DHHS)
Pub 100-20 One-Time Notification	Centers for Medicare & Medicaid Services (CMS)
Transmittal 502	Date: JUNE 12, 2009
	Change Request 6508

SUBJECT: Jurisdiction 4 A/B MAC Merge of the Part B Oklahoma, New Mexico and Colorado CICS Production and User Acceptance Test Regions

I. SUMMARY OF CHANGES: In order to maximize efficiency and cost savings from the MAC implementation, CMS needs to merge the existing Part B Oklahoma and New Mexico CICS production and UAT regions with the Part B Colorado CICS production and UAT region.

NEW / REVISED MATERIAL EFFECTIVE DATE: *November 21, 2009 IMPLEMENTATION DATE: November 21, 2009

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	

III. FUNDING:

SECTION A: For Fiscal Intermediaries and Carriers: N/A

SECTION B: 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

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

Attachment One-Time NotificationPub. 100-20Transmittal: 502Date: June 12, 2009Change Request: 6508

SUBJECT: Jurisdiction 4 A/B MAC Merge of the Part B Oklahoma, New Mexico and Colorado CICS Production and User Acceptance Test Regions

EFFECTIVE DATE: November 21, 2009

IMPLEMENTATION DATE: November 21, 2009

I. GENERAL INFORMATION

Background: When the J4 A/B Medicare Administrative Contractor (MAC) became operational, its Part B workloads were set up in three different sets of customer information control system (CICS) processing and user acceptance testing (UAT) regions. In order to maximize efficiency and cost savings from the MAC implementation, CMS needs to merge the existing Part B Oklahoma and New Mexico CICS production and UAT regions with the Part B Colorado CICS production and UAT region

The Part B Texas region has been transitioned to the CMS Healthcare Integrated General Ledger Accounting System (HIGLAS) system while the Part B Oklahoma, New Mexico and Colorado workloads have not. The HIGLAS business owner is currently developing a methodology to merge HIGLAS Organizations. Until that process has been implemented, CMS will only merge CICS regions that have not yet been transitioned to HIGLAS.

The assignment of Part B provider identification numbers (PINS) has traditionally been a contractor activity. In the past, some contractors that processed multiple workloads may have assigned PINS without regard to whether the same PIN was already being used in another CICS region under its control. In addition, different contractors generally did not coordinate their assignment of PINS, so they might have inadvertently assigned the same PIN to two different providers in different service areas. This was not a concern as long as the CICS regions remained separate. However, a MAC cannot accommodate more than one of the same PIN in a single merged CICS region. In this case, the J4 A/B MAC has identified duplicate PINs that will need to be eliminated.

CR 6199, transmittal 395, dated October 24, 2008, provides for an approach to address this issue. We explain in both that CR and the following business requirements that the MCS maintainer will provide a program to identify duplicate PINS within the CICS regions that will be merged. The J4 A/B MAC will assign replacement PINS to both duplicate numbers, and the MCS maintainer will replace all references to the existing duplicate PINS within MCS with those new numbers. This CR repeats all of the business requirements from CR 6199 for informational purposes only and any BRs associated with CR 6199 will be handled as part of that CR.

Please note that while the effective date for many transitions tends to occur on a Monday, the effective date for this merge will occur on a Saturday due to the software being used to create and populate the CICS production regions.

The J4 A/B MAC contract is currently held by Trailblazers Health Enterprises, LLC. Its address is:

Trailblazers Health Enterprises, LLC 8330 LBJ Freeway Executive Center III Dallas, Texas 75243

B. Policy: N/A

II. BUSINESS REQUIREMENTS TABLE

Number	Requirement										
		Α	D	F	С	R		Sha	red-		OTHER
		/	Μ	Ι	А	Η		Sys	tem		
		В	Ε		R	Η	M	aint	aine	ers	
					R	Ι	F	Μ	V	C	
		M	Μ		Ι		Ι	C	Μ	W	
		Α	Α		Е		S	S	S	F	
		C	C		R		S				
6508.1	The CDS EDC shall create the necessary										
	CICS regions for both user acceptance										
	testing (UAT) and production to										
	accommodate the merge of the Part B										CDS EDC
	Oklahoma and New Mexico workloads and										
	the Part B Colorado workload into a set of										
	UAT and production regions.										
6508.1.1	The CDS EDC shall provide all support										
	needed to successfully implement the new										
	merged production and test regions,										
	including (but not limited to) production										CDS EDC
	support, testing, the running of split/merge										
	and related software supplied by the MCS										
	maintainer, and coordination.										
6508.2	The MCS shared system maintainer shall							Χ			
	provide any necessary support to										
	accomplish the merge, including software to										
	perform the split/merge.										
6508.3	The J4 A/B MAC shall serve as the project										
	lead. It shall coordinate and provide project										J4 A/B
	management, testing and any other services										MAC
	needed to accomplish the merge										
	successfully.										
6508.3.1	The J4 A/B MAC shall perform the testing	Χ									CDS EDC,
	required to validate the merged production										J4 A/B
	region and the EDC shall support that										MAC
(500.4	testing.							X 7			
6508.4	The MCS maintainer, in consultation with							Х			J4 A/B
	the J4 A/B MAC, the CDS EDC, and CMS										MAC. CDS

Number	Requirement	1								
		A / B M A C	M E	C A R I E R	R H H I	M F I S	Sys	red- tem aine V M S	ers C	OTHER
	shall make whatever changes are needed to accommodate the new merged CICS UAT and production regions. This may, for example, require changes to the valid locations within each MCS State, the movement of workload to different locations within that MCS State, or the revision of internal control numbers (ICNs).			K		S				EDC
6508.5	Within 14 days of completing the duplicate PIN replacement of PINS shared by any of the workloads being merged, the J4 A/B MAC shall supply the CERT maintainer (BlessingD@abmedcorp.com) and the ZPIC/PSC CMS business owner (John.Stewart@cms.hhs.gov) with an electronic list of the providers who have had their provider replaced. This list should include the original duplicate PIN and its replacement PIN, as well as the name of the provider, the workloads in which they are located.									J4 A/B MAC, CERT
6508.5.1	Following the merge, MCS shall produce a file for the CERT contractor for all workloads within the merged CICS region. That file shall be produced using the J4 Part B workload number of 04102.						X			J4 A/B MAC
6508.5.2	In the event the ICN of a claim selected for CERT review needs to be changed, MCS, in consultation with the J4 A/B MAC, shall provide the previous ICN, the new ICN and the provider number to the CERT contractor.						X			J4 A/B MAC, CERT
6508.6	As per CR 6199, BR 6199.1 the MCS maintainer shall provide the A/B MAC with file compare software that will produce a list of duplicate PINs found on the MCS Provider Eligibility file between the workloads scheduled to be merged.						X			J4 A/B MAC
6508.6.1	As per CR 6199, BR 6199.1.1, the software referred to in BR 6508.6 shall allow the A/B MAC to assign new numbers to those duplicate PINS by updating a user maintained DATAIN. The J4 A/B MAC						X			J4 A/B MAC

Number	Requirement										
		A / B	D M E	F I		R H H		Syst	red- tem aine		OTHER
		M A C	M A C		R I E R	Ι	F I S S	M C S	V M S	-	
	shall use this software to assign the replacement PINs.						~				
6508.6.2	As per CR 6199, BR 6199.2, the software referred to in 6508.6 shall also run a compare of the MCS duplicate PINs found in the A/B MACs workloads with the A/B MAC's PECOS provider file. The J4 A/B MAC shall ensure that this software is run.							X			J4 A/B MAC
6508.6.2.1	As per CR 6199, BR 6199.2.1, if after performing BR 6508.6.2, the duplicate PIN on the A/B MACs MCS master provider file is found in any of the PECOS files (V200 file) the PECOS record shall be added to the report. The report shall contain the following information: duplicate PIN, plan code, and PIN status. If the PIN is active, the field status shall be blank. If the PIN is inactive, the field status shall be "IN".							X			J4 A/B MAC
6508.6.2.2	The J4 A/B MAC shall take whatever precautions are necessary to ensure that it is not assigning duplicate PINs in multiple Part B workloads.										J4 A/B MAC
6508.7	As per CR 6199, BR 6199.3, the MCS maintainer shall create software that will produce a file that contains only the duplicate PINs from the PECOS file (as per BR 6508.4.2) as well as the newly assigned replacement PINs.							X			
6508.7.1	As per CR 6199, BR 6199.3.1, the MCS maintainer shall use the user maintained input file created by the MAC and the MCS provider file to create a crosswalk file to PECOS containing the following comma delimited data: CURRENT-PROV- NUMBER, ENROLLMENT ID, PAC-ID, CURR PIN END DATE, CARRIER- CODE-STATE, MAC CARRIER ID CODE, NEW-PROV-NUMBER, NEW- PROV-EFT-DATE.							X			
6508.7.2	As soon as possible and no later than 60 days prior to the effective date of the CR, the J4 A/B MAC shall send a copy of the	X									J4 A/B MAC

Number	Requirement										
		Α	D	F	С	R		Sha	red-		OTHER
		/	Μ	Ι	А	Η		Syst	tem		
		В	Ε		R	Η	M	aint	aine	rs	
					R	Ι	F	Μ	V	C	
		Μ	Μ		Ι		Ι	С	Μ	W	
		А	Α		Е		S	S	S	F	
		С	C		R		S				
	file referred to in BR 6508.7.1 to the										
	PECOS maintainer via										
	Jessica.Hoffman@cms.hhs.gov and										
	Meena.Patel@cms.hhs.gov as well as the										
	ZPIC/PSC CMS business owner										
	(John.Stewart@cms.hhs.gov).										14.4.05
6508.7.2.1	30 days prior to the effective date of this										J4 A/B
	CR, the J4 A/B MAC shall send the most										MAC
	current version of the file referred to in BR										
	6508.7.1 to the PECOS maintainer via										
	Jessica.Hoffman@cms.hhs.gov and Meena.Patel@cms.hhs.gov.										
6508.7.2.2	Concurrent with the effective date of this										J4 A/B
0308.7.2.2	CR, the J4 A/B MAC shall send the										J4 A/D MAC
	production version of the file referred to in										MAC
	BR 6508.7.1 to the PECOS maintainer via										
	Jessica.Hoffman@cms.hhs.gov and										
	Meena.Patel@cms.hhs.gov.										
6508.8	The PECOS maintainer shall process the										PECOS
	MCS import file referred to in BR 6508.7.1										
	to both its CMS validation and CMS										
	production regions.										
6508.8.1	The PECOS maintainer shall process all										PECOS
	enrollment records pertaining to the MCS										
	import file referred to in 6508.7.1 regardless										
	of its current status (both "final" and "non-										
	final") with the exception of enrollment										
	records with the status of "deleted".										
6508.8.2	The PECOS maintainer shall end date all										PECOS
	practice locations associated to the										
	duplicate PINs identified in the import file										
	referred to in 6508.7.1. PECOS shall not										
	change any end dates that had been										
(500.0.2	previously assigned to the practice location.										DECOG
6508.8.3	The PECOS Maintainer shall replace each										PECOS
	end-dated practice location with a current										
	copy of that practice location. Each newly created practice location shall be an exact										
	copy of all data (sans duplicate PIN) of each										
	practice location that was end-dated. The										
	PECOS Maintainer shall then add the newly										
	assigned PIN to the practice location.										
			i.	1			1	1	1	1	

Number	Requirement										
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		Μ	Μ		Ι		I	C	M		
		Α	Α		Е		S	S	S	F	
		C	C		R		S				
	duplicate PIN in both Section 1 (Medicare										
	ID) and Section 4 (Practice Location) for each enrollment record identified as										
	belonging to a duplicate PIN as per BR										
	6508.7.1.										
6508.8.5	The PECOS Maintainer shall add the new										PECOS
	PIN to both Section 1 (Medicare ID) and										
	Section 4 (Practice Location) for each										
	enrollment record. The effective date of the new PIN shall be set to set to the effective										
	date indicated in the import file referred to										
	in 6508.7.1.										
6508.8.6	The PECOS Maintainer shall maintain the										PECOS
	relative order of practice location create										
	dates, within the same enrollment record,										
	for practice locations associated to those PINs received from MCS, as per 6508.7.1.										
6508.8.7	PECOS shall not modify the format of the										PECOS
	current MCS export file generated nightly										
	by PECOS.										
6508.8.8	PECOS shall not programmatically re-										PECOS
	trigger enrollment records to MCS as part										
6508.8.9	of CR 6199.PECOS shall not change the status of the										PECOS
0308.8.9	enrollment record prior to or after										TECOS
	processing is complete.										
6508.8.10	PECOS shall not process duplicate PINs on										PECOS
	enrollment records where the duplicate PIN										
	(Section 1) and associated practice										
	location(s) (Section 4) are both already end- dated.										
6508.8.11	PECOS shall process duplicate PINs on										PECOS
00000000	enrollment records where the duplicate PIN										12005
	(Section 1) is end-dated and exists on an										
	active practice location.										
6508.8.12	PECOS shall not specify a primary practice	1									PECOS
	location for Medicare Part B enrollment records.										
6508.8.13	The PECOS Maintainer shall support a 2	+		-						$\left \right $	PECOS
0000010	month test window.	1									12000
6508.8.14	When a PECOS enrollment record	1									J4 A/B
	containing a duplicate PIN is extracted to	1									MAC
	the a new MCS merged region, and the	1									

ADFCRShared-SystemOTABERHMaintainersMaintainersBERHHMaintainersCRIFCRSSFOTMMIICMWAAESSSFnewly assigned PIN was not added to the enrollment record, MCS will process the extract as a PECOS delete record and remove the PECOS history from MCS. This can cause end dates populated to the MCS provider file from a PECOS extract to be removed from the MCS provider file, in essence making the PIN active again for paying claims. In addition, when the duplicate PIN that is being replaced was created before PECOS implementation in October 2003, practice and pay-to addresses added to PECOS from CMS-855 applications will be removed from the MCS provider file history, causing inaccurate addresses to be added back to the provider file This will cause PECOS and MCS provider files to be out of sync.IIIIIIIIIIIn order to correct this, following the effective date of the merge, the J4 A/B MAC shall identify those situations in PECOS on the original duplicate PIN recordIII	THER
BERHMaintainersIICMMIIFMVCMMIICRKSSSFnewly assigned PIN was not added to the enrollment record, MCS will process the extract as a PECOS delete record and remove the PECOS history from MCS. This can cause end dates populated to the MCS provider file from a PECOS extract to be removed from the MCS provider file, in essence making the PIN active again for paying claims. In addition, when the duplicate PIN that is being replaced was created before PECOS implementation in October 2003, practice and pay-to addresses added to PECOS from CMS-855 applications will be removed from the MCS provider file history, causing inaccurate addresses to be added back to the provider file This will cause PECOS and MCS provider file the merge, the J4 A/B MAC shall identify those situations inII <t< td=""><td></td></t<>	
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MAC shall identify those situations in	
PECOS on the original duplicate PIN record 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	
where the newly assigned PIN has not been	
posted and enter the newly assigned PIN.	
(CMS realizes that this may require a	
significant manual effort, depending on the	
number of replacement PINs that need to be	
posted.)Image: Second seco	
logic to replace all references to the duplicate PINS within MCS with	
duplicate PINS within MCS with appropriate references to the newly	
assigned replacement PINS.	
6508.10 MCS shall assign the provider start date X	
belonging to the duplicate PIN to the newly	
assigned replacement PIN.	
	A/R
files & applications with appropriate	A/B IAC
references to the newly assigned	A/B IAC
replacement PINS, including but not limited	
to its EDI front end and its free /low cost	

THER
4 A/B
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Number	Requirement										
		A / B	D M E	F I		R H H		Sys	red- tem aine		OTHER
		M A C			R I E R	I	F I S S	M C S	1	C	
	history (including purged history that had been converted to MCS) to reflect the mappings to be used in the new merged region.										
6508.16	Following the merge, the J4 A/B MAC shall continue to process and report upon the workload using the appropriate MAC state specific workload numbers.	X									J4 A/B MAC
6508.17	Following the merge into the single CICS production and UAT regions, all shared systems and CMS contractors shall continue to successfully interact with the state specific MAC workload numbers and the newly assigned replacement PINS.						X	X		X	BESS, CAFM, CMIS, CMS BDC, COBA, CROWD, CSAMS, DCS, ECRS, HCIS, IRIS, LOLA, NGD, the NPI crosswalk, PECOS, PIMR, PORS, PS&R, the PSC/ZPICs, PSOR, PULSE, REMAS, and REMIS, Maintainers
6508.18	MCS shall provide for the notification of anyone querying the system with a deleted duplicate PIN. If practical, the notification should point to the appropriate replacement PIN. If that is not practical, the notification shall return both replacement PINS and the J4 A/B MAC shall determine the appropriate PIN.							X			J4 A/B MAC
6508.19	When a PECOS enrollment record containing a duplicate PIN is extracted to the										J4 A/B MAC

Number	Requirement										
		A /	D M	F I		R H			red- tem		OTHER
		В	Е		R	Η	Ma	aint	aine	rs	
		М	М		R I	Ι	F I	M C	V M	C W	
		A C	A C		E R		S S	S	S	F	
	a new MCS merged region, and the newly assigned PIN was not added to the enrollment record, MCS will process the extract as a PECOS delete record and remove the PECOS history from MCS. This can cause end dates populated to the MCS provider file from a PECOS extract to be removed from the MCS provider file, in essence making the PIN active again for paying claims. In addition, when the duplicate PIN that is being replaced was created before PECOS implementation in October 2003, practice and pay-to addresses added to PECOS from CMS-855 applications will be removed from the MCS provider file history, causing inaccurate addresses to be added back to the provider file This will cause PECOS and MCS provider files to be out of sync. In order to correct this, following the effective date of the merge, the J4 A/B MAC shall identify those situations in PECOS on the original duplicate PIN record where the newly assigned PIN has not been posted and enter the newly assigned PIN. (CMS realizes that this may require a significant manual effort, depending on the number of replacement PINs that need to be posted.)										

Number	Requirement								
		A / B M A C	D M E M A C	Ι	Н	Ma F I	Syst	 ers C	OTHER
6508.20	At least 90 days prior to the effective date of this CR, the J4 A/B MAC shall notify each provider who will need to have its PIN changed of the new PIN and when it should begin using it.								J4 A/B MAC
6508.21	The J4 A/B MAC shall post this entire instruction, or a direct link to this instruction, on their Web site and include information about it in a listserv message within 1 week of the release of this instruction. In addition, the entire instruction shall be included in the Contractors next regularly scheduled bulletin. If the J4 A/B MAC wants to supplement this with localized information that would benefit their provider community in billing and administering the Medicare program correctly, it should seek approval from its CMS Project Officer (Virginia.Adams@cms.hhs.gov) or her designee before doing so.								J4 A/B MAC

IV. SUPPORTING INFORMATION

A. For any recommendations and supporting information associated with listed requirements, use the box below:

Use "Should" to denote a recommendation.

X-Ref	Recommendations or other supporting information:
Requireme	
nt	
Number	
CR 6199	CR 6199, transmittal 395, dated October 24, 2008, provides for a systemic approach to address duplicate PINS in the workloads that are being merged. We explain in both that CR and the above business requirements that the MCS maintainer will provide a program to identify duplicate PINS within the CICS regions that will be merged. The J4 A/B MAC will assign replacement PINS to both duplicate numbers, and the MCS maintainer will replace all references to the existing duplicate PINS within MCS with those new numbers. This CR repeats all of the business requirements from CR 6199 for informational purposes only and any BRs associated with CR 6199 will be handled as part of that CR.

B. For all other recommendations and supporting information, use this space:

This CR is necessary in order for the CMS to realize significant additional efficiencies and cost savings from the J4 A/B MAC transition.

V. CONTACTS

Pre-Implementation Contact(s): Scott Levine (<u>Scott.Levine@cms.hhs.gov</u> or 212-616-2337) and Steven Felsenberg (<u>Steven.Felsenberg@cms.hhs.gov</u> or 410-786-2693). **Post-Implementation Contact(s):** Scott Levine (<u>Scott.Levine@cms.hhs.gov</u> or 212-616-2337) and Steven Felsenberg (<u>Steven.Felsenberg@cms.hhs.gov</u> or 410-786-2693).

VI. FUNDING:

A. A: For Fiscal Intermediaries and Carriers: N/A

B. For Medicare Administrative Contractors (MAC):

The contractor is hereby advised that this constitutes technical direction as defined in your contract. CMS does not construe this as a change to the Statement of Work (SOW). 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.