

Beneficiary Lookup Introduction

Slide 1 of 18 - Beneficiary Lookup Introduction

CMS
CENTERS FOR MEDICARE & MEDICAID SERVICES

COB&R
Coordination of
Benefits and Recovery

MMSEA Section 111 Group Health Plan

Beneficiary Lookup

Version 7.2, 10/07/2024
Note: CMS reserves the right to modify this presentation. To ensure you have the most current version, verify that the version and date on this page match the version and date on the corresponding page of the PDF currently available on:
<https://www.cms.gov/medicare/coordination-benefits-recovery/mandatory-insurer-reporting-group-health-plans>.

Slide notes

Welcome to the Beneficiary Lookup training course.

Slide 2 of 18 - Disclaimer

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 and Medicaid Services (CMS) instructions for the MMSEA Section 111 implementation. All affected entities are responsible for following the instructions found at the following link:
<https://www.cms.gov/medicare/coordination-benefits-recovery/mandatory-insurer-reporting-group-health-plans>.

Slide notes

While all information in this document is believed to be correct at the time of writing, this Computer Based Training or CBT is for educational purposes only and does not constitute official Centers for Medicare & Medicaid Services or CMS instructions for the MMSEA Section 111 implementation.

All affected entities are responsible for following the instructions found at: [CMS GHP Website](#).

Slide 3 of 18 - Course Overview

Course Overview

- Beneficiary Lookup Action
 - Query request limit
 - How to use
 - Matching criteria
 - Response results



Slide notes

This module will explain the Beneficiary Lookup action and who can use it. It will review the query request limit associated with the Beneficiary Lookup function.

It will also show how to use the Beneficiary Lookup action and explain the matching criteria and response results.

Slide 4 of 18 - Beneficiary Lookup

Beneficiary Lookup

Online, real-time query capability on the Section 111 COBSW

Provides a response as to whether information supplied for a covered individual can be matched to a Medicare beneficiary



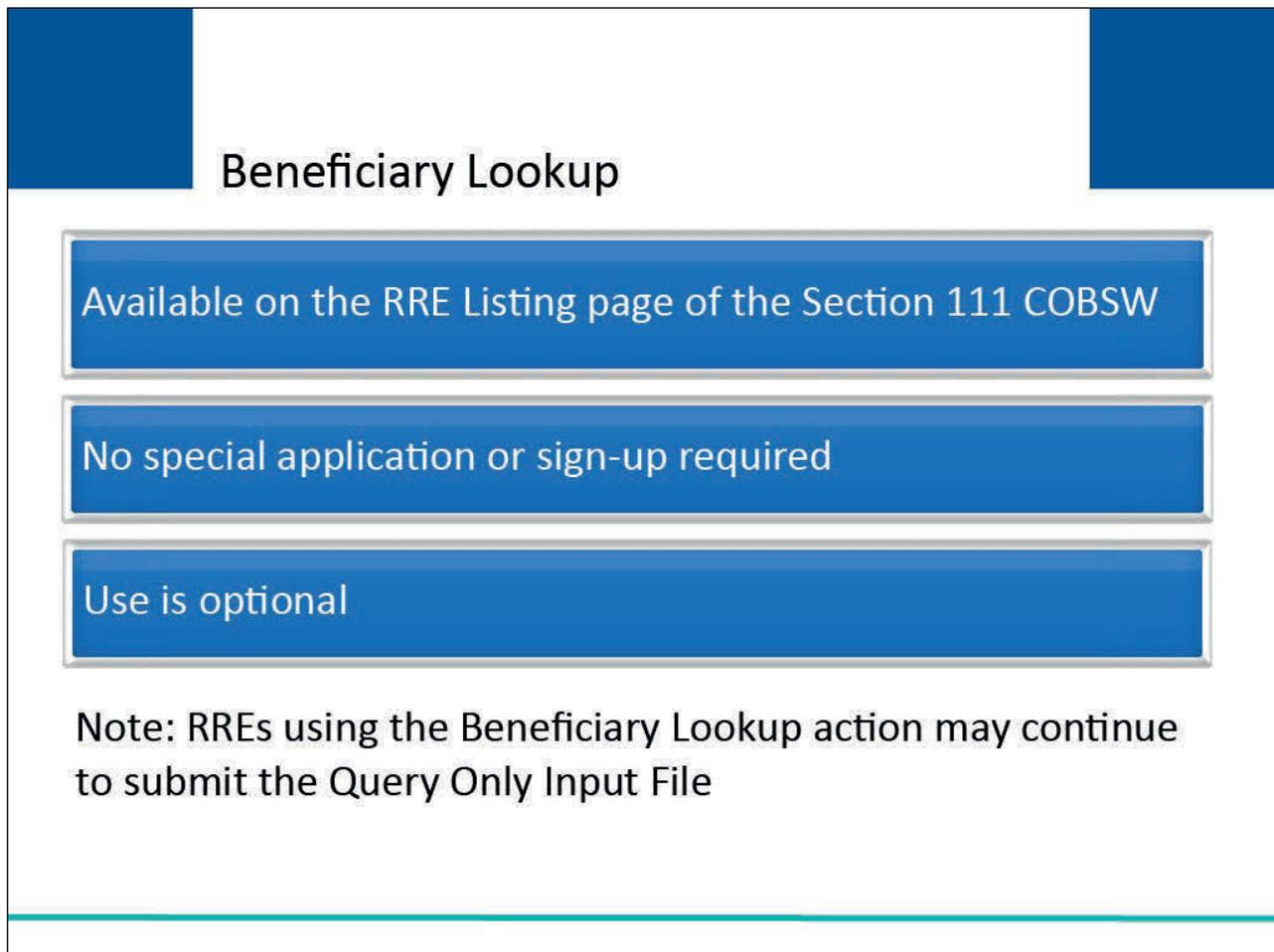
Slide notes

An online, real-time query capability is offered on the Section 111 Coordination of Benefits Secure Website (COBSW).

The Beneficiary Lookup action provides a response as to whether information supplied for a covered individual can be matched to a Medicare beneficiary.

The Beneficiary Lookup may be used to assist with reporting GHP information mandated by Section 111 of the MMSEA.

Slide 5 of 18 - Beneficiary Lookup

The slide features a white background with a blue header bar at the top. The title "Beneficiary Lookup" is centered in the header. Below the header, there are three blue rectangular boxes with white text, each containing a key point. At the bottom of the slide, there is a note in black text. A thin teal horizontal line is located at the very bottom of the slide area.

Beneficiary Lookup

- Available on the RRE Listing page of the Section 111 COBSW
- No special application or sign-up required
- Use is optional

Note: RREs using the Beneficiary Lookup action may continue to submit the Query Only Input File

Slide notes

The Beneficiary Lookup action is available on the RRE Listing page after logging on to the Section 111 COBSW.

There is no special application or sign-up required to utilize the Beneficiary Lookup action and use of the Beneficiary Lookup action is optional.

Please note that Responsible Reporting Entities (RREs) using the Beneficiary Lookup action may continue to submit the Query Only Input File.

Slide 6 of 18 - Beneficiary Lookup

Beneficiary Lookup

- Available to RREs that are in a production status
- All users associated to the RRE ID, Account Manager and Account Designees, will have access



Slide notes

The Beneficiary Lookup action is available to RREs that are in a production status. All users associated to the RRE ID, Account Manager and Account Designees, will be able to use the Beneficiary Lookup function.

Slide 7 of 18 - Section 111 Mandatory Reporting Usage Warning

Section 111 Mandatory Reporting Website Usage Warning

Unauthorized Access To This Computer System Is Prohibited By Law

This warning banner provides privacy and security notices consistent with applicable federal laws, directives, and other federal guidance for accessing this Government system, which includes: (1) this computer network, (2) all computers connected to this network, and (3) all devices and storage media attached to this network or to a computer on this network.

This system is provided for Government-authorized use only.

Unauthorized or improper use of this system is prohibited and may result in disciplinary action and/or civil and criminal penalties.

Personal use of social media and networking sites on this system is limited as to not interfere with official work duties and is subject to monitoring.

By using this system, you understand and consent to the following:

- The Government may monitor, record, and audit your system usage, including usage of personal devices and email systems for official duties or to conduct HHS business. Therefore, you have no reasonable expectation of privacy regarding any communication or data transiting or stored on this system. At any time, and for any lawful Government purpose, the Government may monitor, intercept, and search and seize any communication or data transiting or stored on this system.
- Any communication or data transiting or stored on this system may be disclosed or used for any lawful Government purpose.

Privacy Act Statement

The collection of this information is authorized by Section 1862(b) of the Social Security Act (codified at 42 U.S.C 1395y(b)) (see also 42, C.F.R. 411.24). The information collected will be used to identify and recover past conditional and mistaken Medicare primary payments and to prevent Medicare from making mistaken payments in the future for those Medicare Secondary Payer situations that continue to exist. The Privacy Act (5 U.S.C. 552a(b)), as amended, prohibits the disclosure of information maintained by the Centers for Medicare & Medicaid Services (CMS) in a system of records to third parties, unless the beneficiary provides a written request or explicit written consent/authorization for a party to receive such information. Where the beneficiary provides written consent/proof of representation, CMS will permit authorized parties to access requisite information.

Attestation of Information

The information provided is complete, truthful, accurate, and meets all requirements set forth to use this process.

LOG OFF IMMEDIATELY if you do not agree to the conditions stated in this warning.

[Login to Section 111 COBSW at https://www.imp.cob.cms.hhs.gov/mra/](https://www.imp.cob.cms.hhs.gov/mra/)

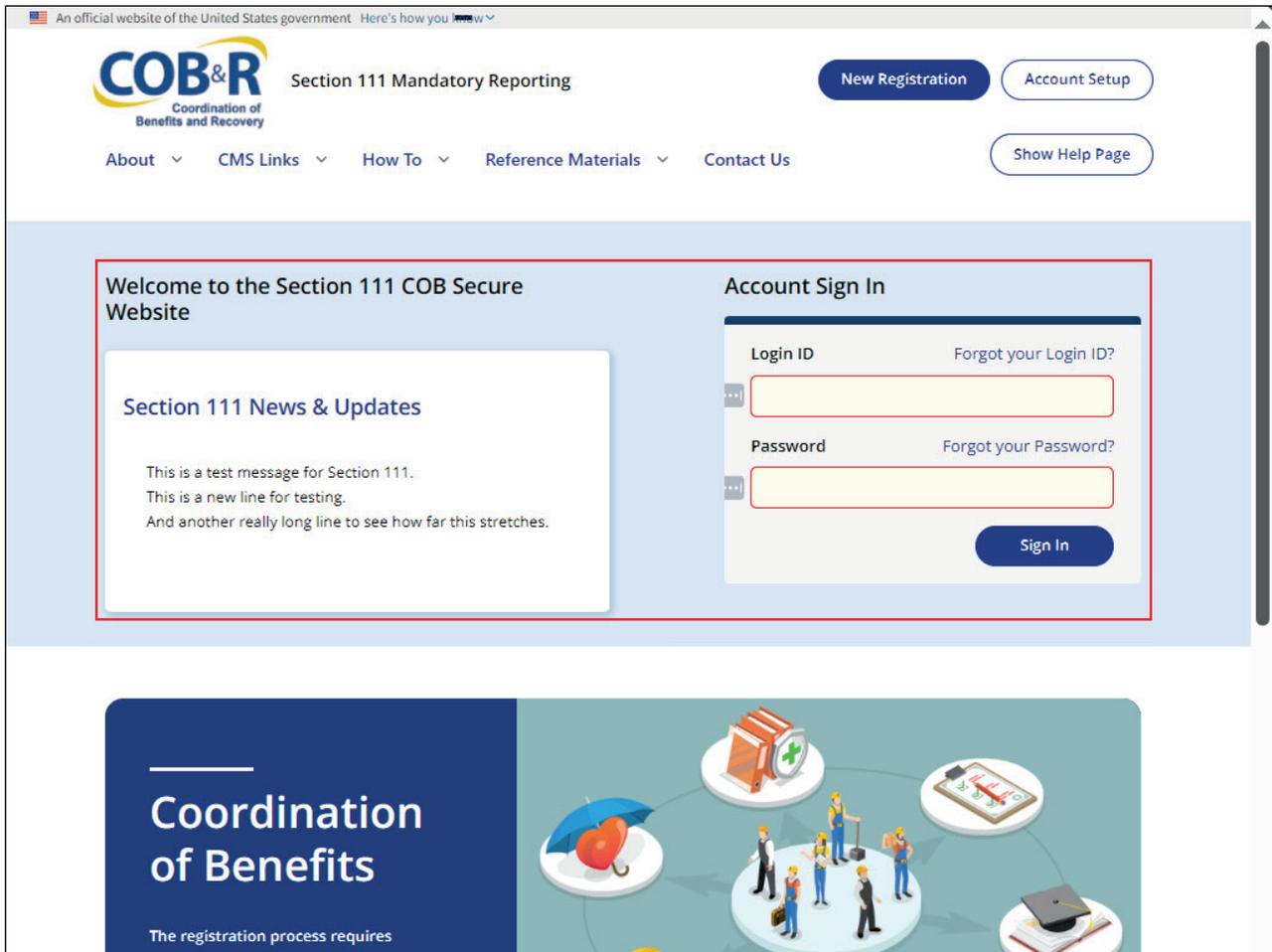
Print

Accept

Slide notes

When accessing the Section 111 COBSW, the Section 111 Mandatory Reporting Website Usage Warning page will appear. Review the Data Use Agreement (DUA) and click Accept to access the Sign In page to the application.

Slide 8 of 18 - Welcome to the Section 111 COB Secure Website



Slide notes

The Welcome to the Section 111 COB Secure Website/Sign In page will appear. Enter your Login credentials and click Sign In.

Note: Pay close attention to the Section 111 News and Updates section of this page. Any updates or needed information will be posted in this section.

Slide 9 of 18 - RRE Listing Page

RRE Listing July 29, 2024 at 1:46:48 PM

This page lists all the Responsible Reporting Identification Numbers (RRE IDs) with which you are associated. You can select an individual RRE from the list to see Actions available for the selected RRE ID.

The list may be sorted by selecting the title of the column you wish to sort. Selecting the same column again will reverse the sort order for the column. Clear

The list may be filtered by entering values in the columns you wish to filter. To remove a filter, simply remove the value from the filter row, or select the **Clear** button. Selecting the **Clear** button will remove all filters.

RRE Listing Export

RRE ID ↑↓	Name ↑↓	RRE Status ↑↓	Submission Period ↑↓	Reporting Option ↑↓	Profile Report Status ↑↓	User Role ↑↓	EDI Representative ↑↓	EDI Contact Info
<input type="text" value="RRE ID Filtr"/>	<input type="text" value="RRE Name F"/>	<input type="text" value="RRE Status Fil"/>	<input type="text" value="Submission Period"/>	<input type="text" value="Reporting Optio"/>	<input type="text" value="Profile Report S"/>	<input type="text" value="User Role F"/>	<input type="text" value="EDI Representative Fil"/>	
145691	NGHP Basic	Production	06	Expanded	Delinquent	AM	Fran Williams	(800) 879-4592 FWilliams@bcrcgdit.com
145687	GHP Expanded	Production	02	Basic	Recertified	AM	Lisa Smith	(800) 879-4587 Lsmith@bcrcgdit.com
145688	NGHP DDE	Test	0	DDE	N/A	AM	Izzy Kay	(800) 879-4588 ikay@bcrcgdit.com
145689	GHP Basic	Setup		Basic	N/A	AD	Rose George	(800) 879-4589 Rgeorge@bcrcgdit.com
145690	VDSA	Production	01	Expanded	Not Due	AM	Tim Baldwin	(800) 879-4590

Slide notes

Once logged in, the RRE Listing page will appear. In order to access the Beneficiary Lookup, you will need to select the individual RRE ID link to see the actions available for that RRE ID.

Slide 10 of 18 - RRE Information Detail Page

The screenshot shows the 'RRE Information Detail' page on the COB&R website. The page header includes the COB&R logo, 'Section 111 Mandatory Reporting', a user profile for 'Mike Brown', and a 'Print' button. A navigation menu contains 'About', 'CMS Links', 'How To', 'Reference Materials', and 'Contact Us'. A 'Show Help Page' button is also present. The main content area is titled 'RRE Information Detail' and includes a timestamp 'July 29, 2024 at 1:47:03 PM'. Two paragraphs of text provide instructions on recertification. Below the text are two panels: 'Profile Report Information' and 'EDI Representative'. The 'Profile Report Information' panel contains a table of data, and the 'EDI Representative' panel contains contact information for Todd Bannar.

Profile Report Information	
Reporter ID:	10000
Recertification Due Date:	10/08/2022
Profile Report Date:	03/01/2024
Last Recertification:	01/21/2024
Profile Changed Date:	03/01/2024
Submission Date:	

EDI Representative	
Name:	TODD BANNAR
Email:	DL-HIT-MSPSC- SPRING_BATCH_SUP PORT@RANDOM.CO M
Phone:	(410) 842-1404

Slide notes

The RRE Information Detail page will appear. The Actions links are listed on this page. You will need to use the scroll bar on the far right-hand side of the page to scroll down to the list.

Slide 11 of 18 - RRE Information Detail - Actions Links

Profile Report Information

Reporter ID:	10000	Recertification Due Date:	10/08/2022
Profile Report Date:	03/01/2024	Last Recertification Submission Date:	01/21/2024
Profile Changed Date:	03/01/2024		

RRE Company Information

Reporter Type:	GHP	Address:	02611 Testing Dr Towson, MD 12312 - 12312	Phone:	(111) 111-1112
Name:	Dynamics Inc			Fax:	(410) 555-1632
TIN:	36978542	Lines of Business:	Hospital, Medical, Prescription Drug	HRA Records Only:	No
NAIC:	1111111			Unsolicited Alerts:	No

Authorized Representative Information

EDI Representative

Name: TODD BANNAR
Email: DL-HIT-MSPSC-SPRING_BATCH_SUPPORT@RANDOM.COM
Phone: (410) 842-1404

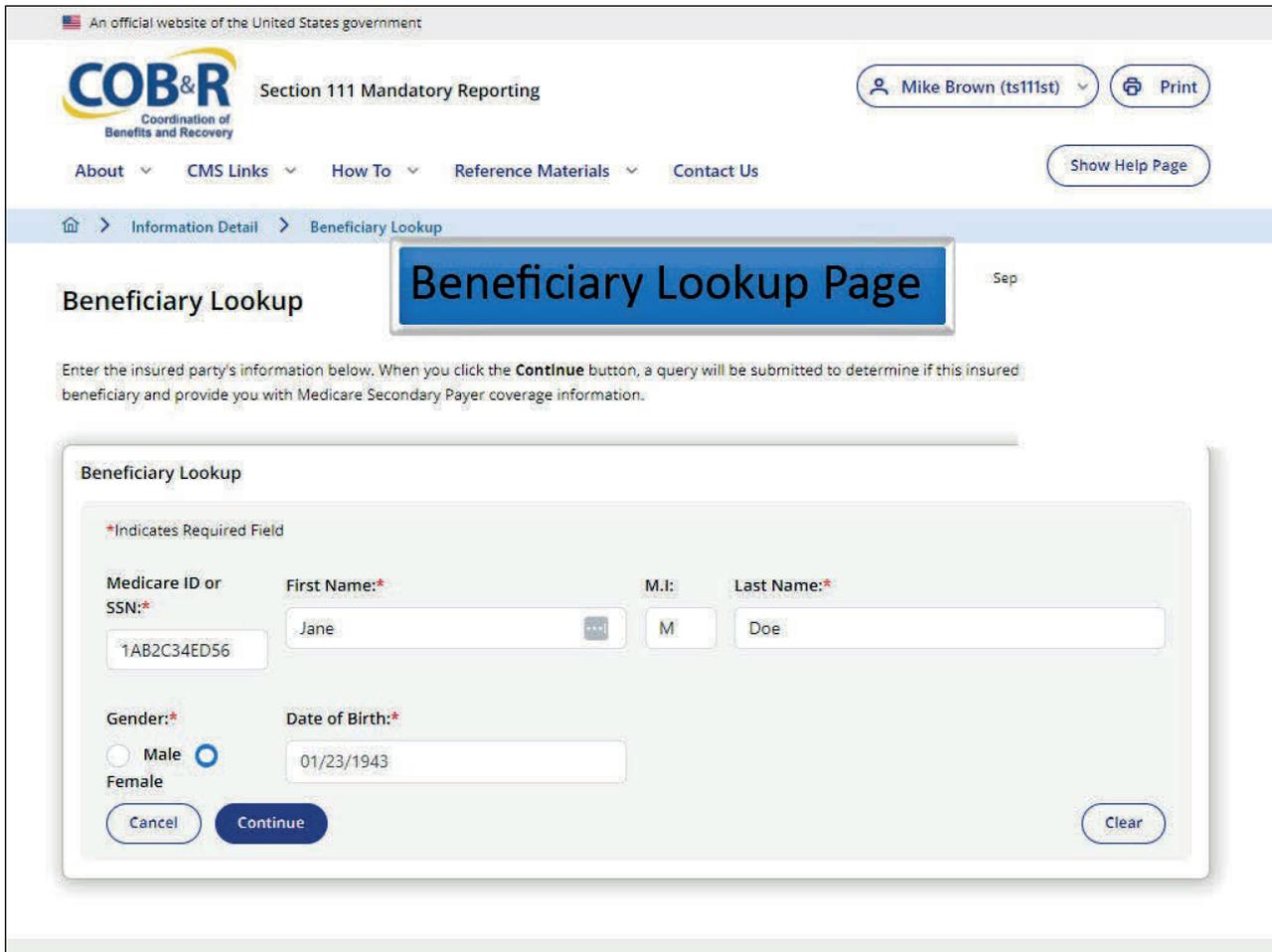
Actions

- > File Processing Results
- > Test File Results
- > Upload File
- > Designee Maintenance
- > View Account Activity
- > New Claim
- > Claim Listing
- > Register for DDE
- > **Beneficiary Lookup**
- > TIN Record Maintenance
- > Remove RRE

Slide notes

From the Actions links, select the Beneficiary Lookup link.

Slide 12 of 18 - Beneficiary Lookup Page



Slide notes

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

Enter the following required information:

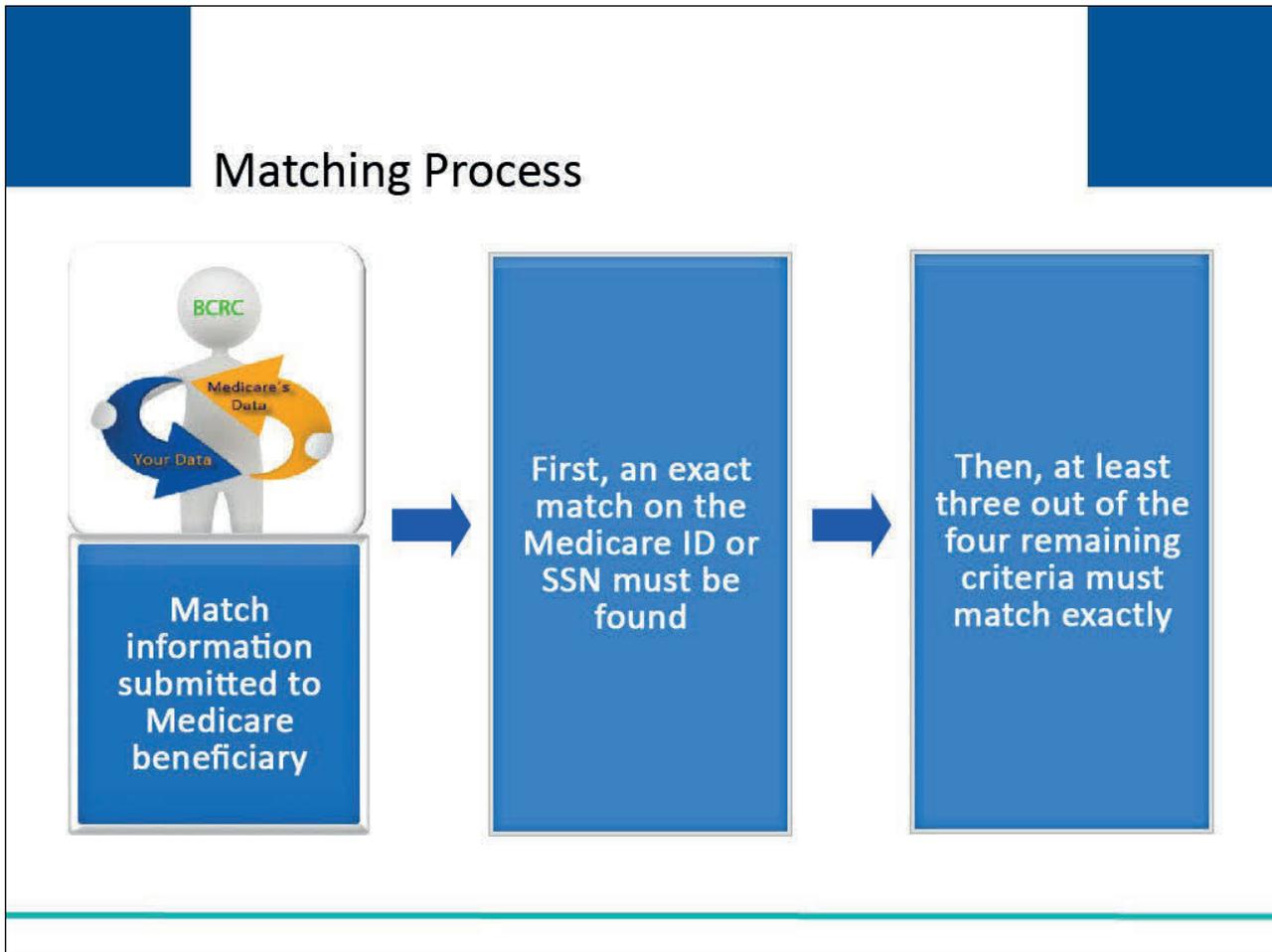
- Covered Individual’s Medicare ID or Social Security Number (SSN),
- First Name,
- Last Name,
- Gender, and
- Date of Birth.

Then click on the Continue button.

Note: RREs are limited to 500 query requests per RRE ID per calendar month using the Beneficiary Lookup. The Transactions Remaining field will display the number of remaining available lookups. 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.

Slide 13 of 18 - Matching Process



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 Only Input File and the MSP Input File.

First, an exact match on the Medicare ID or SSN must be found. If both the Medicare ID and SSN are supplied for the matching, only the Medicare ID will be used.

Then at least three out of the four remaining criteria must be matched exactly. Note: Only the first letter of the first name and the first six letters of the last name will be used for matching.

Slide 14 of 18 - Match Found

The screenshot displays the 'Beneficiary Lookup' form and its response. The form includes fields for Medicare ID or SSN, First Name, M.I., Last Name, Gender, and Date of Birth. A 'Match Found' notification is overlaid on the form. Below the form, the 'Beneficiary Lookup Response' section provides detailed Medicare information for the matched individual.

Beneficiary Lookup

*Indicates Required Field

Medicare ID or SSN:* 1AB2C34ED56 First Name:* Jane M.I.: M Last Name:* Doe

Gender:* Male Female Date of Birth:* 01/23/1943

Buttons: Cancel, Continue, Clear

Match Found

Beneficiary Lookup Response

Most Recent Medicare Entitlement Information

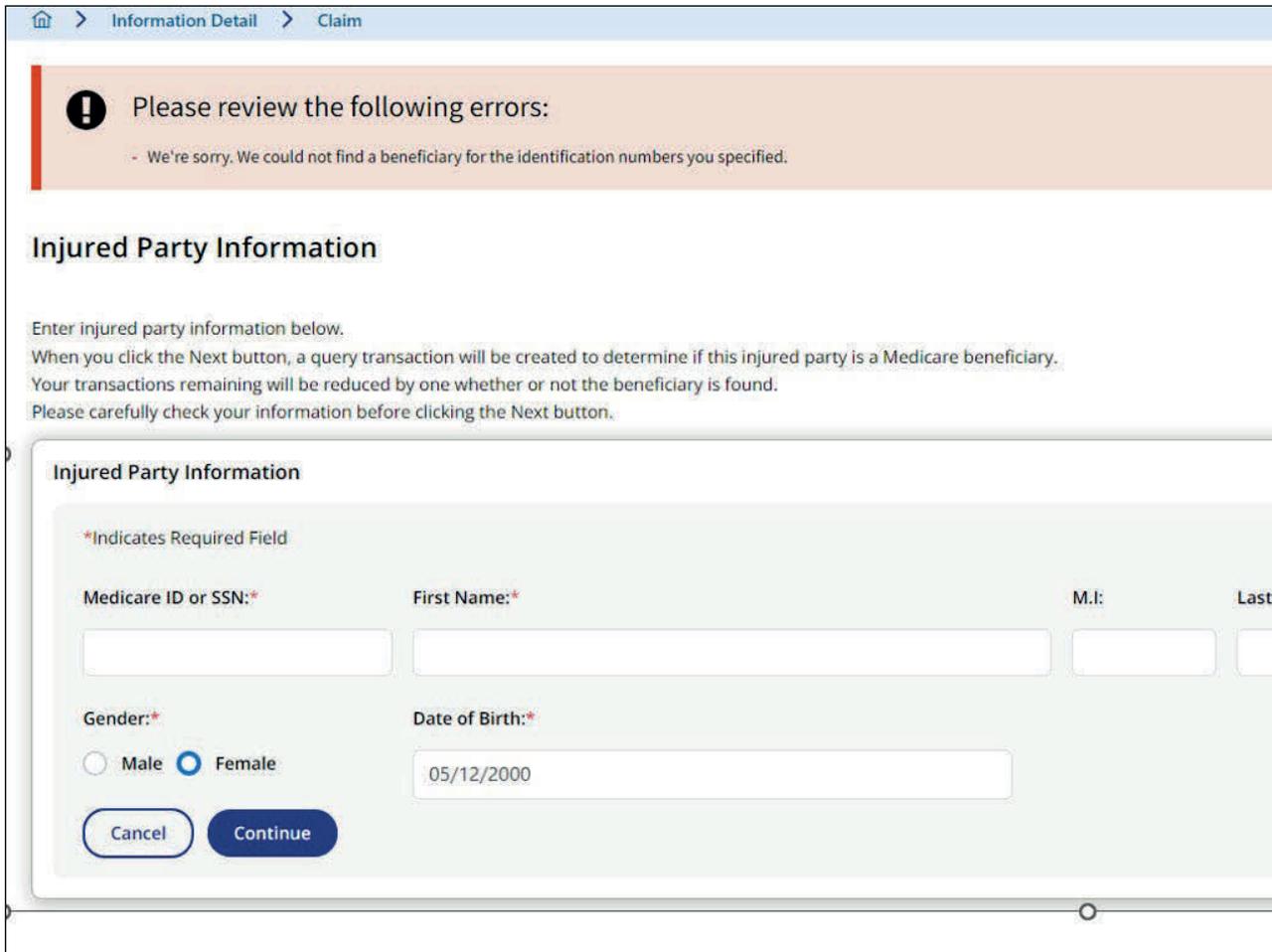
Medicare ID: 1AB2C34ED56	First Name: JANE	M.I.: M	Last Name: DOE	Gender: Female	Date of Birth: 01/23/1943
Date of Death:	Entitlement Reason: Working Aged				
Part A Effective Date: 04/01/2013	Part A Termination Date:	Part B Effective Date: 02/01/2014	Part B Termination Date:		
Part C: No records found.					
ESRD Coverage Start Date:	ESRD Coverage End Date:	1st Dialysis Date:			
Transplant Date:	Transplant Failure Date:	Self Training Date:			
Medicare Secondary Payer Coverage Row(s):	06/01/2013 - 02/01/2014				

Slide notes

If the covered individual information entered was matched to a beneficiary, the Beneficiary Lookup Response page displays with the current information Medicare has on file.

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

Slide 15 of 18 - No Match Found



Slide notes

If the information entered cannot be matched to a Medicare beneficiary, a message displays indicating that no match was found.

The information entered for the query redisplay, but no information is returned indicating why a match was not found.

If the Beneficiary Not Found page displays, you have the option to click Prev (Previous) to return to the Beneficiary Lookup page, to review and edit the information entered.

When you perform another lookup after editing previously entered information, the transaction remaining count is reduced by 1.

Click on the Next button to go to a blank Beneficiary Lookup page to perform another query; or click on the Cancel to return to the RRE Listing page.

Slide 16 of 18 - Course Summary

Course Summary

- Beneficiary Lookup Action
 - Query request limit
 - How to use
 - Matching criteria
 - Response results



Slide notes

This module explained the Beneficiary Lookup action and who can use it. It reviewed the query request limit associated with the Beneficiary Lookup function.

It also showed how to use the Beneficiary Lookup action and explained the matching criteria and response results.

Slide 17 of 18 - Beneficiary Lookup Conclusion



You have completed the Beneficiary Lookup course. Information in this course can be referenced by using the GHP User Guide’s table of contents and any subsequent alerts. These documents are available for download at the following link:
<https://www.cms.gov/medicare/coordination-benefits-recovery/mandatory-insurer-reporting-group-health-plans>.

Slide notes

You have completed the Beneficiary Lookup course. Information in this course can be referenced by using the GHP User Guide’s table of contents and any subsequent alerts.

These documents are available for download at the following link: [CMS GHP Website](#).

Slide 18 of 18 - GHP Training Survey



If you have any questions or feedback on this material,
please go to the following URL:
<https://www.surveymonkey.com/s/GHPTraining>.

Slide notes

If you have any questions or feedback on this material, please go the following URL: [GHP Training Survey](https://www.surveymonkey.com/s/GHPTraining).