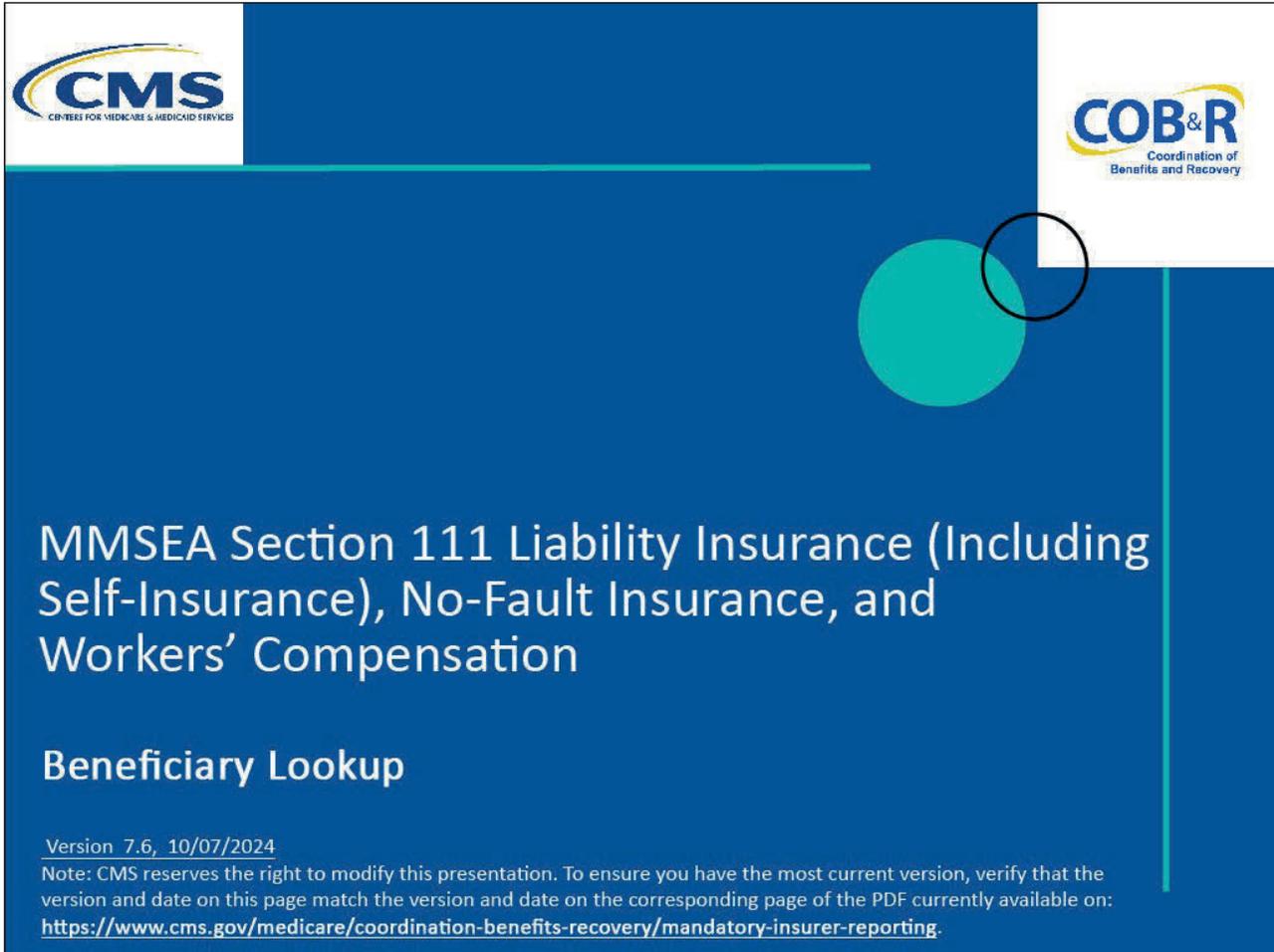


Beneficiary Lookup

Slide 1 of 18 - Beneficiary Lookup



CMS
CENTERS FOR MEDICARE & MEDICAID SERVICES

COB&R
Coordination of
Benefits and Recovery

MMSEA Section 111 Liability Insurance (Including Self-Insurance), No-Fault Insurance, and Workers' Compensation

Beneficiary Lookup

Version 7.6, 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>.

Slide notes

Welcome to the Beneficiary Lookup CBT.

Note: This module only applies to Responsible Reporting Entities (RREs) that will be submitting Section 111 claim information via an electronic file submission.

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 & Medicaid Services (CMS) instructions for the MMSEA Section 111 implementation. All affected entities are responsible for following the instructions found under the *Reference Materials* menu at the following link:

<https://www.imp.cob.cms.hhs.gov/mra/>.

Slide notes

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 & Medicaid Services (CMS) instructions for the MMSEA Section 111 implementation.

All affected entities are responsible for following the instructions found at the following link: [Section 111 COBSW](#).

Slide 3 of 18 - Course Overview

Course Overview

- Beneficiary Lookup
 - 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.

NOTE: Liability insurance (including self-insurance), no-fault insurance, and workers' compensation are sometimes collectively referred to as "non-group health plan" or "NGHP".

The term NGHP will be used in this CBT for ease of reference.

Slide 4 of 18 - PAID Act

PAID Act

The Medicare Secondary Payer (MSP) policy is designed to ensure that the Medicare Program does not pay for healthcare expenses for which another entity is legally responsible. To aid settling parties in determining this information, Congress has enacted the Provide Accurate Information Directly Act also known as the PAID Act requiring that CMS provide Non-Group Health Plans with a Medicare beneficiary's Part C and Part D enrollment information for the past 3 years.

This information will be provided both online and offline in the NGHP Query Response File. Additionally, CMS has requested that this solution also include the most recent Part A and Part B Entitlement dates.

**Slide notes**

The Medicare Secondary Payer (MSP) policy is designed to ensure that the Medicare Program does not pay for healthcare expenses for which another entity is legally responsible. To aid settling parties in determining this information, Congress has enacted the Provide Accurate Information Directly Act also known as the PAID Act requiring that CMS provide Non-Group Health Plans with a Medicare beneficiary's Part C and Part D enrollment information for the past three years.

This information will be provided both online and offline in the NGHP Query Response File. Additionally, CMS has requested that this solution also include the most recent Part A and Part B Entitlement dates.

Note: To support the PAID Act, the Query Response File will be updated to include Contract Number, Contract Name, Plan Number, Coordination of Benefits (COB) Address, and Entitlement Dates for the last three years (up to 12 instances) of Part C and Part D coverage. The updates will also include the most recent Part A and Part B entitlement dates.

Slide 5 of 18 - Beneficiary Lookup

Beneficiary Lookup

Permits a user to submit an online query to determine the Medicare status of an injured party

Available to NGHP RREs that have not selected the DDE reporting option and are in a production status

Not available to RREs that use DDE because this same functionality is offered within the DDE process



Slide notes

The Beneficiary Lookup feature on the Section 111 Coordination of Benefits Secure Website (COBSW) permits a user to submit an online query when a Section 111 RRE has an immediate need to determine the Medicare status of an injured party.

This feature is available to NGHP RREs that have not selected the Direct Data Entry (DDE) reporting option and are in a production status.

Note: The Beneficiary Lookup action is not available to RREs that have DDE as a submission method because this same functionality is offered within the DDE process.

Slide 6 of 18 - Query Request Limit

The screenshot shows the COB&R (Coordination of Benefits and Recovery) website interface. At the top, it says "An official website of the United States government. Here's how you can help." The main header includes the COB&R logo and "Section 111 Mandatory Reporting". There are navigation links for "About", "CMS Links", "How To", "Reference Materials", and "Contact Us". A user profile for "Mike Brown (ts111st)" and a "Print" button are visible. A "Show Help Page" button is also present. The breadcrumb trail shows "Information Detail > Beneficiary Lookup". The page title is "Beneficiary Lookup" with a timestamp of "July 31, 2024 at 11:11:57 AM".

Enter the insured party's information below. When you click the **Continue** button, a query will be submitted to determine if this insured party is a Medicare beneficiary and provide you with Medicare Secondary Payer coverage information.

Beneficiary Lookup

*Indicates Required Field

Medicare ID or SSN:* First Name:* M.I.: Last Name:*

1AB2C34ED56 Jane M Doe

Gender:* Date of Birth:*

Male Female 01/23/1943

Cancel Continue Clear

Slide notes

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

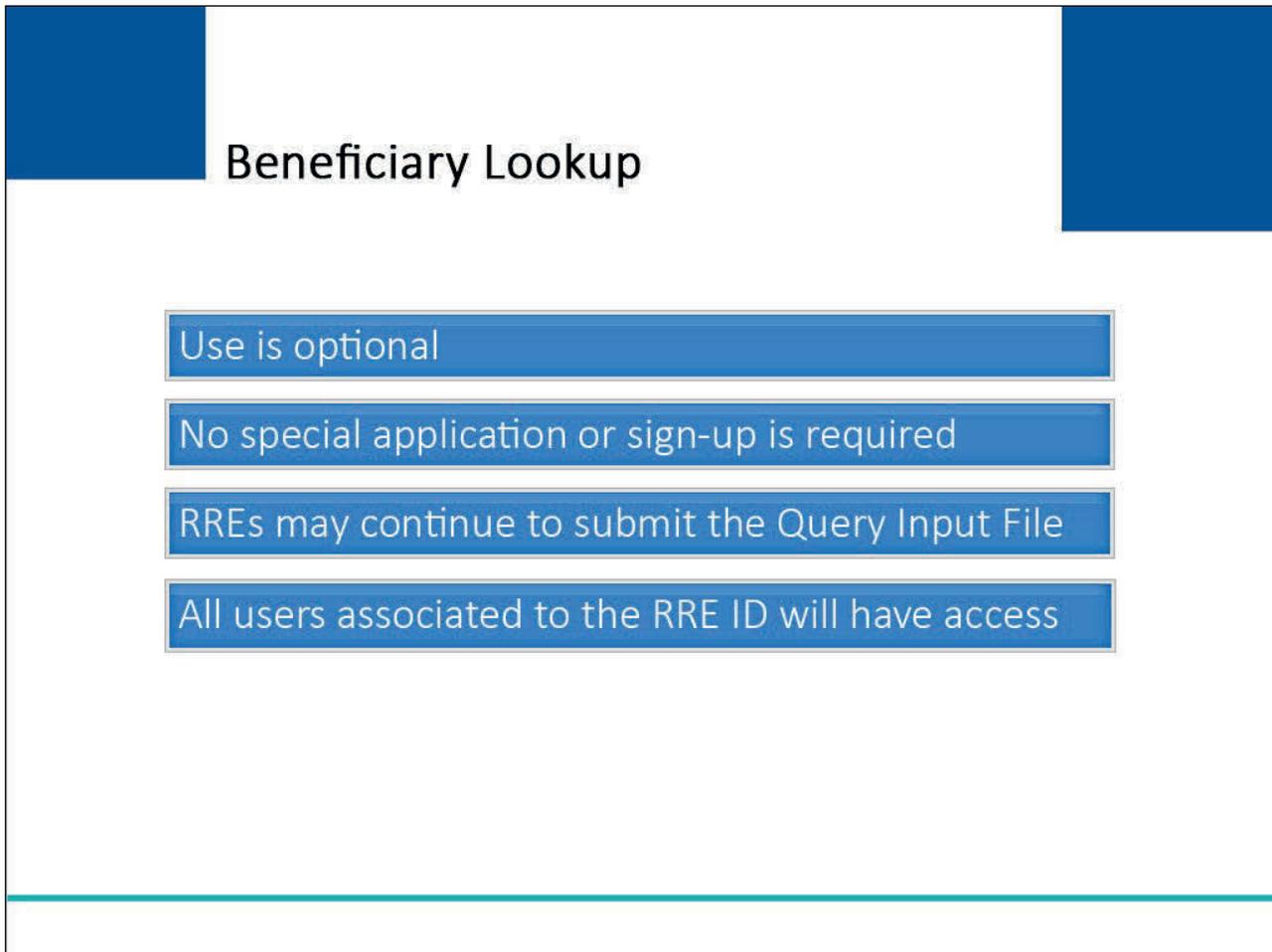
Note: DDE and GHP RREs accessing this page will not see the "Transactions Remaining" field as the lookup is not limited for those RREs.

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.

Note: If you need to perform additional beneficiary lookups and have no transactions remaining, contact your Electronic Data Interchange (EDI) Representative.

Slide 7 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 title, four blue rectangular boxes are stacked vertically, each containing a line of text. A thin teal horizontal line is located at the bottom of the slide content area.

Beneficiary Lookup

- Use is optional
- No special application or sign-up is required
- RREs may continue to submit the Query Input File
- All users associated to the RRE ID will have access

Slide notes

Use of the Beneficiary Lookup action is optional. No special application or sign-up is required. RREs using the Beneficiary Lookup action may continue to submit the Query Input File.

All users associated with the RRE ID (Account Manager and Account Designees) will have access to the Beneficiary Lookup function.

Slide 8 of 18 - RRE Listing Page

RRE Listing

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

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
RRE ID Fil	RRE Name F	RRE Status Fil	Submission Period	Reporting Optio	Profile Report S	User Role F	EDI Representative Fil	
145691	NGHP Basic	Production	06	Expanded	Delinquent	AM	Fran Williams	(800) 879-4592 FWilliams@bcrngdit.com
145687	GHP Expanded	Production	02	Basic	Recertified	AM	Lisa Smith	(800) 879-4587 Lsmith@bcrngdit.com
145688	NGHP DDE	Test	0	DDE	N/A	AM	Izzy Kay	(800) 879-4588 Ikay@bcrngdit.com
145689	GHP Basic	Setup		Basic	N/A	AD	Rose George	(800) 879-4589 Rgeorge@bcrngdit.com
145690	VDSA	Production	01	Expanded	Not Due	AM	Tim Baldwin	(800) 879-4590

Slide notes

In order to access the Beneficiary Lookup action, users must first successfully login to the [COBSW Section 111](#). Once logged in, the RRE Listing page will appear.

To access the RRE Information Detail page, click the individual RRE ID link from the table.

Slide 9 of 18 - RRE Information Detail Page

The screenshot shows the 'RRE Information Detail' page. At the top left is the COB&R logo (Coordination of Benefits and Recovery) and the text 'Section 111 Mandatory Reporting'. On the top right, there is a user profile 'Mike Brown (ts111st)' and a 'Print' button. Below the logo are navigation links: 'About', 'CMS Links', 'How To', 'Reference Materials', and 'Contact Us'. A 'Show Help Page' button is also present. The main content area has a breadcrumb 'Information Detail' and a timestamp 'July 29, 2024 at 4:33:26 PM'. The title is 'RRE Information Detail'. Two paragraphs of text explain the recertification process. Below this are three panels: 'Profile Report Information' (with fields for Reporter ID, Profile Report Date, Profile Changed Date, Recertification Due Date, and Last Recertification Submission Date), 'EDI Representative' (with fields for Name, Email, and Phone), and 'RRE Company Information'. At the bottom right, there is an 'Actions' box containing a link '> File Processing Results'.

Slide notes

The RRE Information Detail page will appear. The Actions links are displayed on the mid- right-hand side of the screen. Use the scroll bar to scroll down to see all of the options available including Beneficiary Lookup.

Slide 10 of 18 - RRE Information Detail - Actions

Reporter ID: 10000	Recertification Due Date: 10/08/2022	Name: TODD BANNAR Email: DL-HIT-MSPSC- SPRING_BATCH_SUPPORT@RANDOM.COM Phone: (410) 842-1404
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		
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, click the Beneficiary Lookup link.

Slide 11 of 18 - Beneficiary Lookup Page

An official website of the United States government. Here's how you know.

COB&R
Coordination of Benefits and Recovery

Section 111 Mandatory Reporting

Mike Brown (ts111st) Print

About CMS Links How To Reference Materials Contact Us Show Help Page

Information Detail > Beneficiary Lookup

July 31, 2024 at 11:11:57 AM

Beneficiary Lookup

Enter the insured party's information below. When you click the **Continue** button, a query will be submitted to determine if this insured party is a Medicare beneficiary and provide you with Medicare Secondary Payer coverage information.

Beneficiary Lookup

*Indicates Required Field

Medicare ID or SSN:* First Name:* M.I.: Last Name:*

1AB2C34ED56 Jane M Doe

Gender:* Date of Birth:*

Male Female

01/23/1943

Cancel Continue Clear

Slide notes

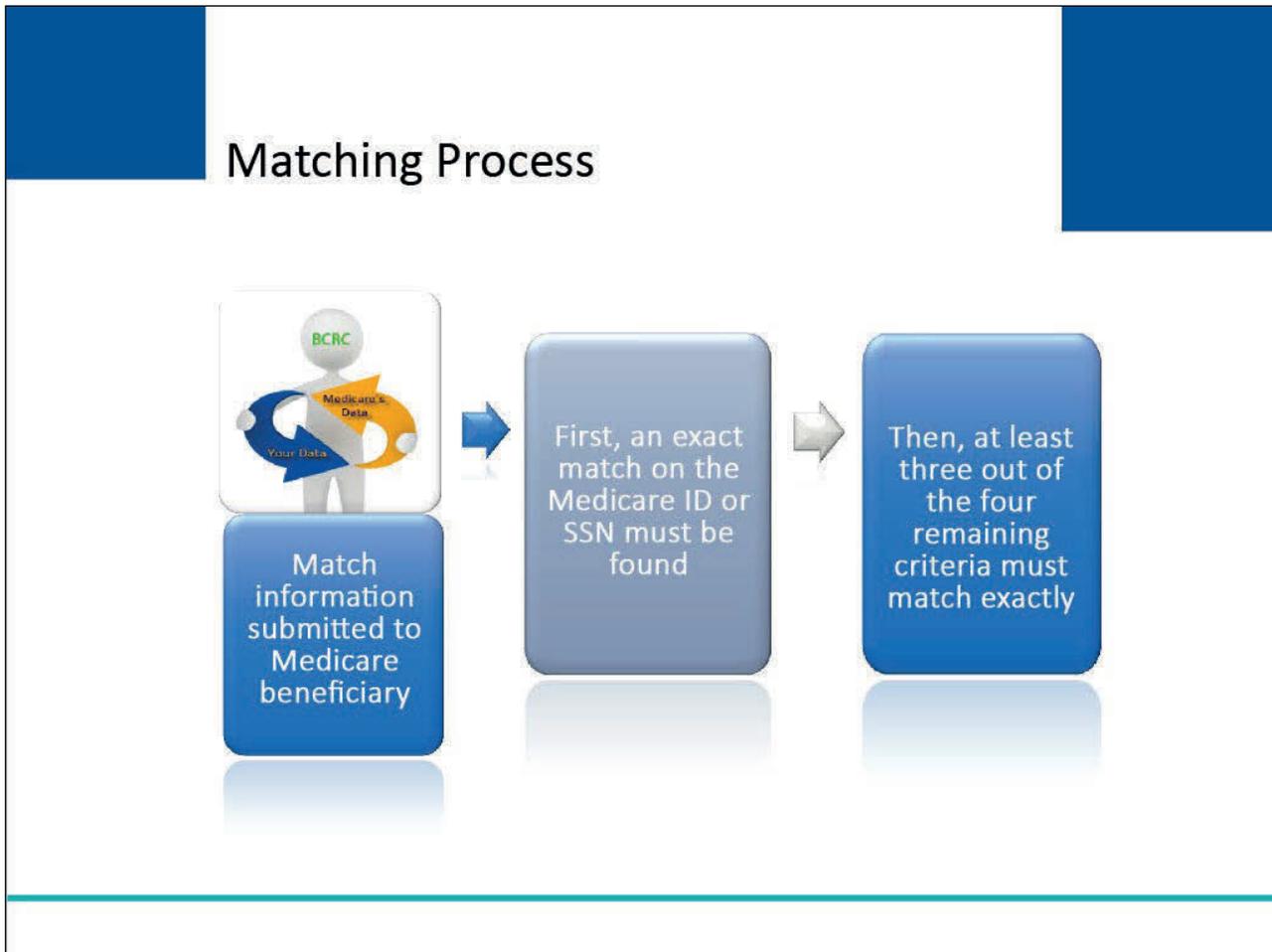
The Beneficiary Lookup page will appear. Required fields are denoted by asterisks.

Enter the following required information:

- Injured Party's Medicare ID or Social Security Number (SSN),
- First Name,
- Last Name,
- Gender, and
- Date of Birth.

Then click the Continue button.

Slide 12 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 Input File and the Claim Input File.

First, an exact match on the Medicare ID or SSN (i.e., the last 5 digits or full 9 digits of the SSN, whichever is submitted) must be found. If both the Medicare ID and SSN are supplied for the matching, the search will be performed using the Medicare ID.

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

Slide 13 of 18 - Match Found

*Indicates Required Field

Medicare ID or SSN:* First Name:* M.I. Last Name:*

1A2C34ED56 Jane M Doe

Gender:* Date of Birth:*

Male Female 01/23/1943

Cancel Continue Clear

Beneficiary Lookup Response

Most Recent Medicare Entitlement Information

Medicare ID: 1A2C34ED56	First Name: JANE	M.I.:	Last Name: DOE	Gender: Female	Date of Birth: 10/27/1954
Part A Effective Date: 04/01/2016	Part A Termination Date:	Part B Effective Date: 04/01/2016		Part B Termination Date:	
Part C Contract Number: H5216	PBP Number: 384	Part C Effective Date: 01/01/2024		Part C Termination Date:	
Contract Name: HUMANA INSURANCE COMPANY	Address 1: 500 West Main Street	Address 2:	City: Louisville	State: KY	ZIP: 11234
Part D Contract Number: H5216	PBP Number: 384	Part D Effective Date: 01/01/2024		Part D Termination Date:	
Contract Name: HUMANA INSURANCE COMPANY	Address 1: 500 West Main Street	Address 2:	City: Louisville	State: KY	ZIP: 11234

Part C History ⌵

Part D History ⌵

Slide notes

If the injured party information entered was matched to a beneficiary, the Beneficiary Lookup Response page will appear with the current information Medicare has on file.

The Beneficiary Lookup Response page for NGHP RREs will now display the most recent Part A, Part B, Part C, and Part D dates, including contract identification and address information for Parts C and D.

It will also include a function to access a new Part C History page as well as a function to access a new Part D History page.

Slide 14 of 18 - Beneficiary Lookup Part C History

Part A Effective Date: 04/01/2016
Part A Termination Date:
Part B Effective Date: 04/01/2016
Part B Termination Date:

Part C Contract Number: H5216

Contract Name: HUMANA INSURANCE COMPANY

PBP Number: 384

Address 1: 500 West Main Street

Part C Effective Date: 01/01/2024

Address 2: **City:** Louisville

Part C Termination Date:

State: KY **ZIP:** 11234

Part D Contract Number: H5216

Contract Name: HUMANA INSURANCE COMPANY

PBP Number: 384

Address 1: 500 West Main Street

Part D Effective Date: 01/01/2024

Address 2: **City:** Louisville

Part D Termination Date:

State: KY **ZIP:** 11234

Part C History ^

Contract Number	PBP Number	Effective Date	Termination Date	Contract Name	Address 1	Address 2	City	State	Zip
H5216	384	01/01/2024		HUMANA INSURANCE COMPANY	500 West Main Street		Louisville	KY	11234
H8087	004	01/01/2023	12/31/2023	HUMANADENTAL INSURANCE COMPANY	500 West Main Street		Louisville	KY	11234
H2320	022	01/01/2020	12/31/2022	PRIORITY HEALTH	1239 East Beltline Ave NE	MS2205	Grand Rapids	MI	23456

Part D History v




Helpful Links

[CMS/HHS Vulnerability Disclosure Policy](#)

[Privacy Policy](#)

Slide notes

The Beneficiary Lookup Part C History portion will display Bene information and up to 12 occurrences of the following information covering the last 3 years of Part C coverage:

- Contract Number,
- Contract Name,
- Effective Date,
- Termination Date,
- Address, and
- PBP Number.

Slide 15 of 18 - No Match Found

The screenshot shows a web application interface. At the top, there is a breadcrumb trail: Home > Information Detail > Claim. Below this, a light orange banner contains an error message: "Please review the following errors:" followed by a list item: "- We're sorry. We could not find a beneficiary for the identification numbers you specified." Below the banner is a section titled "Injured Party Information". Under this title, there is instructional text: "Enter injured party information below. When you click the Next button, a query transaction will be created to determine if this injured party is a Medicare beneficiary. Your transactions remaining will be reduced by one whether or not the beneficiary is found. Please carefully check your information before clicking the Next button." Below the text is a form titled "Injured Party Information". The form includes a legend: "*Indicates Required Field". The form fields are: "Medicare ID or SSN:*" (empty text box), "First Name:*" (empty text box), "M.I." (empty text box), "Last" (empty text box), "Gender:*" (radio buttons for "Male" and "Female", with "Female" selected), and "Date of Birth:*" (text box containing "05/12/2000"). At the bottom of the form are two buttons: "Cancel" and "Continue".

Slide notes

If the information entered cannot be matched to a Medicare beneficiary, a message will display asking you to review the following errors. Add any missing information or correct any inaccurate information and click continue.

If the errors continue to be found, you have the option to click Clear to return to the Beneficiary Lookup where you can review and edit the information entered or you can click Cancel to return to the RRE Information Detail page.

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

Slide 16 - of 18 - Course Summary

Course Summary

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

Slide 17 of 18 - Conclusion



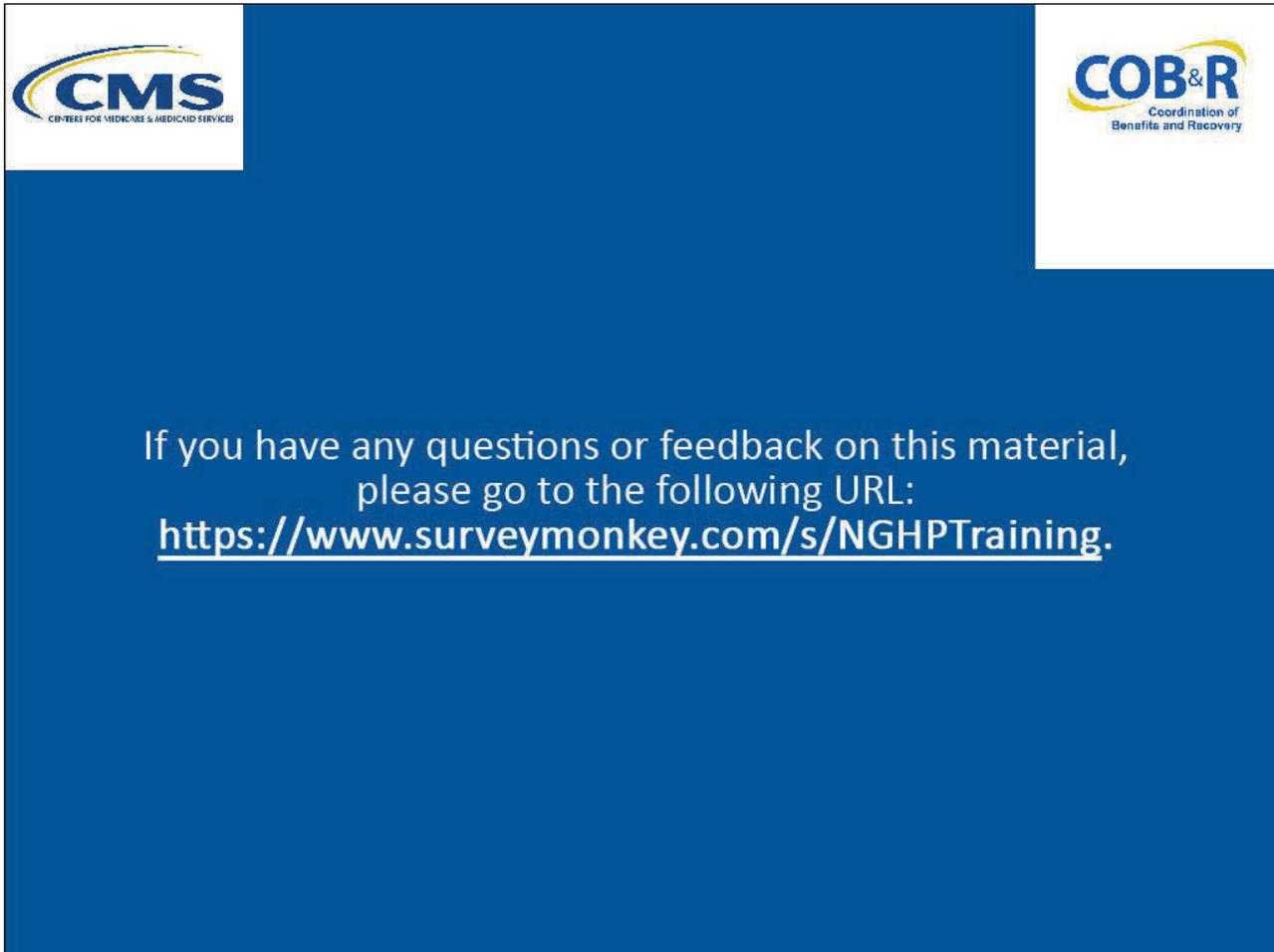
You have completed the Beneficiary Lookup course. Information in this course can be referenced by using the NGHP User Guide's table of contents. This document is available for download at the following link:
<https://www.cms.gov/medicare/coordination-benefits-recovery/mandatory-insurer-reporting>.

Slide notes

You have completed the Beneficiary Lookup course. Information in this course can be referenced by using the NGHP User Guide's table of contents.

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

Slide 18 of 18 - NGHP Training Survey



The slide features a blue background with two logos in the top corners: CMS (Centers for Medicare & Medicaid Services) on the left and COB&R (Coordination of Benefits and Recovery) on the right. The central text reads: "If you have any questions or feedback on this material, please go to the following URL: <https://www.surveymonkey.com/s/NGHPTraining>."

Slide notes

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