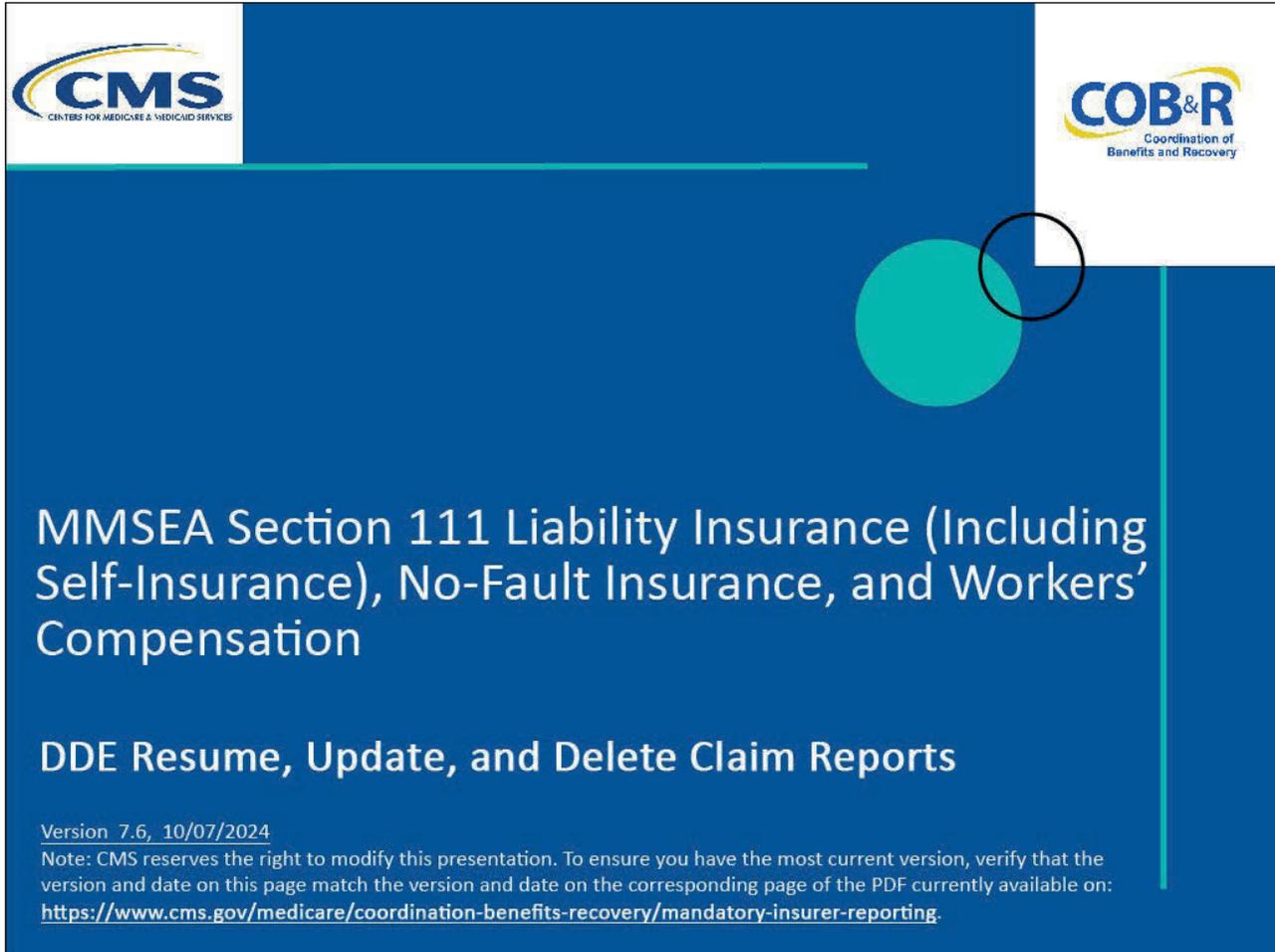


## Direct Data Entry (DDE) Resume, Update, and Delete Claim Reports

Slide 1 - of 54 - Direct Data Entry (DDE) Resume, Update, and Delete Claim Reports



**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

## DDE Resume, Update, and Delete Claim Reports

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 Direct Data Entry (DDE) Resume, Update, and Delete Claim Reports course.

**Slide 2 of 54 - 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**

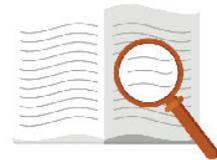
While all information in this document is believed to be correct at the time of writing, this Computer Based Training (CBT) is for educational purposes only and does not constitute official Centers for Medicare & Medicaid Services (CMS) instructions for the MMSEA Section 111 implementation.

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

**Slide 3 of 54 - Course Overview**

## Course Overview

- Claim Listing
- When and how to
  - Resume claim submission
  - Submit updates
  - Submit deletes

**Slide notes**

This module begins with an overview of the Claim Listing page. It explains when and how to resume the DDE claim submission process and clarifies when and how to submit updates and deletes to DDE claim reports.

**Slide 4 of 54 - 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 54 - Claim Listing**

## Claim Listing

- Lists all
  - Previously submitted
  - Saved (Not Submitted) DDE claim transactions
- Accessed to search for DDE claim reports

**Slide notes**

The DDE Claim Listing page displays a list of all previously submitted or Saved (Not Submitted) DDE claim transactions. You will access this page to search for claim reports.

**Slide 6 of 54 - Section 111 Mandatory Reporting Website Usage Warning Page**

**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.

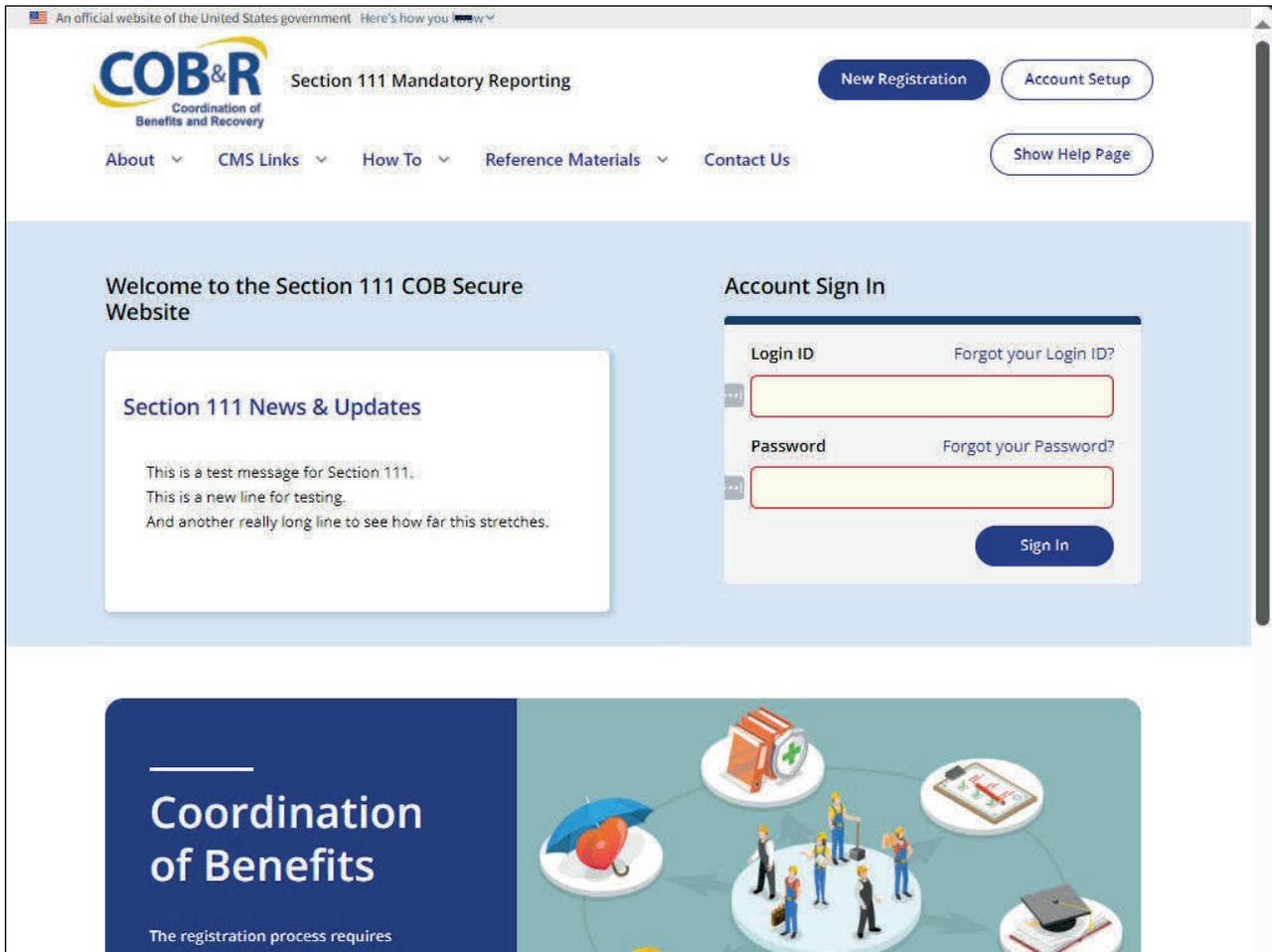
LOG OFF IMMEDIATELY if you do not agree to the conditions stated in this warning.

**Accept**

**Slide notes**

To access the Claim Listing page, you must login to the Section 111 Coordination of Benefits Secure Website (COBSW) at [Section 111 COBSW](#). Once you access the URL, the Section 111 Mandatory Reporting Website Usage Warning page will appear detailing the Data Use Agreement (DUA). Review the DUA and then proceed to click the “Accept” link.

**Slide 7 of 54 - Welcome to the Section 111 COB Secure Website/Sign In Page**



**Slide notes**

The Welcome to the Section 111 COB Secure Website will appear. Enter your Login ID and Password and click Sign In to access the Section 111.

**Slide 8 of 54 - RRE Listing**

**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 Fil"/>	<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 Option"/>	<input type="text" value="Profile Report S"/>	<input type="text" value="User Role F"/>	<input type="text" value="EDI Representative Fil"/>	
<a href="#">145691</a>	NGHP Basic	Production	06	Expanded	Delinquent	AM	Fran Williams	(800) 879-4592 <a href="mailto:FWilliams@bcrcgdit.com">FWilliams@bcrcgdit.com</a>
<a href="#">145687</a>	GHP Expanded	Production	02	Basic	Recertified	AM	Lisa Smith	(800) 879-4587 <a href="mailto:Lsmith@bcrcgdit.com">Lsmith@bcrcgdit.com</a>
<a href="#">145688</a>	NGHP DDE	Test	0	DDE	N/A	AM	Izzy Kay	(800) 879-4588 <a href="mailto:Ikay@bcrcgdit.com">Ikay@bcrcgdit.com</a>
<a href="#">145689</a>	GHP Basic	Setup		Basic	N/A	AD	Rose George	(800) 879-4589 <a href="mailto:Rgeorge@bcrcgdit.com">Rgeorge@bcrcgdit.com</a>
<a href="#">145690</a>	VDSA	Production	01	Expanded	Not Due	AM	Tim Baldwin	(800) 879-4590

**Slide notes**

Once logged in, the RRE Listing page will appear. Select the RRE ID link from the table to access your available Actions links.

Note: The S111/MRA application RRE Actions links will now include the “Beneficiary Lookup” as an available action for DDE reporters.

Additionally, as of July 2023, RREs will be notified when another source has updated their submitted records, RREs may now opt-in via the Section 111 Coordination of Benefits Secure Website (COBSW) application to receive a monthly NGHP Unsolicited Response File. This will provide key information about updates to ORM records originally submitted in the last 12 months and allow RREs to either update their own internal data or contact the BCRC for a correction.

The modifier type codes CEM (Employer/Other Plan Sponsor Name), DSA (Name of the Voluntary Data Sharing Agreement (VDSA) entity), and PRV (From a Provider) will not be used in the NGHP Unsolicited Response File and have been removed from the list.

Note: July 12, 2023 - Notice Regarding the Receipt of Empty (Header & Trailer Record Only) Non-Group Health Plan (NGHP) Unsolicited Response Files Questions have been received from NGHP Responsible

Reporting Entities (RREs) regarding receipt of empty (header and trailer record only) Unsolicited Response Files. Please be aware that a file will be transmitted regardless of record count. This means that an RRE that has opted in to receive the Unsolicited Response File will always receive a file that includes any updates made in the last 30 days. If there are no records updated by an outside source that are linked to that RRE ID in that timeframe, the Unsolicited Response File will be empty. Please note that the Non-Group Health Plan User Guide will also be updated to clarify the receipt of empty files.

Slide 9 of 54 - RRE Information Detail

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', along with a 'Show Help Page' button. 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 and editing. Below the text are two side-by-side panels: 'Profile Report Information' and 'EDI Representative'. The 'Profile Report Information' panel contains a table of key dates and IDs. 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 Date:	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.COM
Phone:	(410) 842-1404

Slide notes

The RRE Information Detail page will appear. Use the scroll bar on the far right to scroll down to the Actions links available for your selected RRE ID.

Slide 10 of 54 - RRE Information Detail - Actions Links

The screenshot displays a user interface for RRE Information Detail. It is divided into several sections:

- Profile Report Information:** A table with the following data:

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		
- EDI Representative:** A box containing contact information for TODD BANNAR:

Name: TODD BANNAR  
Email: DL-HIT-MSPSC-SPRING\_BATCH\_SUPPORT@RANDOM.COM  
Phone: (410) 842-1404
- RRE Company Information:** A table with the following data:

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:** A section at the bottom left, currently empty.
- Actions:** A list of links on the right side, enclosed in a red box. A red arrow points to the "Claim Listing" link.
  - > 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 Claim Listing link.

**Slide 11 of 54 - Claim Listing**

Information Detail > Claim Listing
August 28, 2024 at 11:02:13 AM

## Claim Listing

This page lists all of the claims you have entered. To search for a specific claim, enter search values into any or all of the search fields, and click on the **Search** button.

---

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.

+ New Claim
RRE ID: 145688
RRE Name: Dynamics Inc
Transactions Remaining: 101

Latest DCN ↑↓	Transaction Count ↑↓	Policy Number ↑↓	Claim Number ↑↓	Medicare ID ↑↓	Beneficiary Name ↑↓	CMS Date of Injury ↑↓	Initial Entry Date ↑↓	Last Action ↑↓	Status ↑↓	Disposition ↑↓
10580	1	pn1111	15678000	D1690519212	WANDA CARR	01/01/2011	01/26/2021	Update	Saved Not Submitted	
10575	9	12345678	15678054	519212	MARY WISE	01/01/2010	12/28/2020	Update	Completed	01
10576	9	914567	15678012	919212	BEN RODGERS	01/01/2010	12/28/2020	Update	Deleted	
10581	1	5678ABC	15678001	018340998A	FRANK JOBS	01/01/2011	12/28/2020	Update	New	
10577	9	123456C	15678003	719212	LEWIS CANNON	01/01/2010	12/28/2020	Update	In Process	

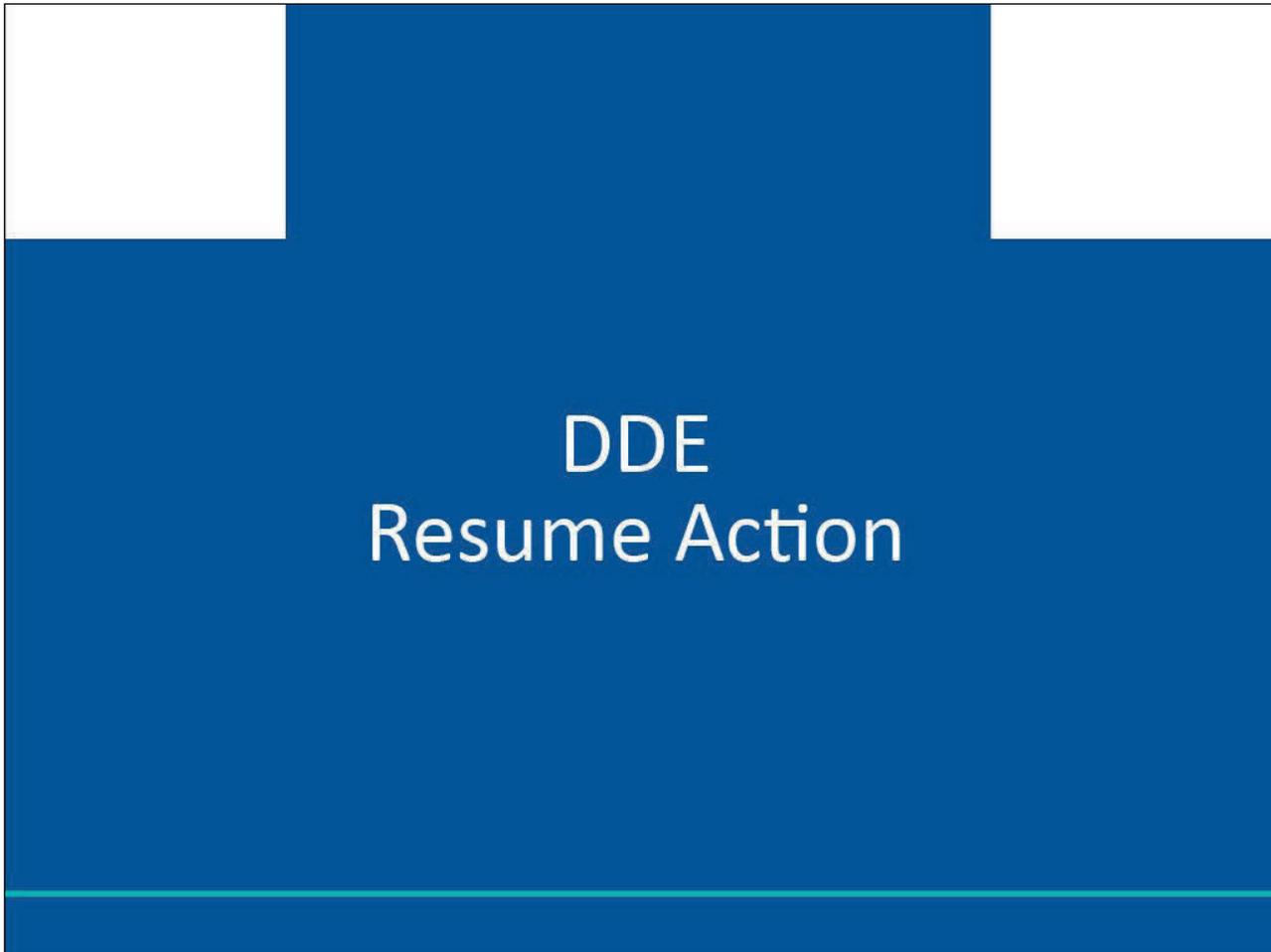
**Slide notes**

When the Claim Listing page displays, you will see a list of all DDE claim reports that have been entered. Every submitted DDE claim report will receive a Disposition Code.

If the claim report is processed with no errors, the applicable Disposition Code will be returned in this field. If the claim report was not accepted due to errors, a value of SP will be returned in this field.

Please note: If the submitted claim receives any Error Codes or Compliance Codes, they will be displayed on the Claim Information page under the Claim Processing Results.

**Slide 12 of 54 - DDE Resume Action**



**Slide notes**

DDE Resume Action

**Slide 13 of 54 - When to Resume Claim Submission**

## When to Resume Claim Submission

- Save and Exit
  - Allows users to provide and save partial information for a claim report if they do not have all of the information available to complete the claim
- DDE claims can be saved for up to 30 calendar days
  - An incomplete claim must be completed and submitted or it will be deleted

**Slide notes**

In DDE, Save & Exit allows a user to provide and save partial information for a claim report if they do not have all of the information readily available to submit the claim.

These claims can be saved for up to 30 calendar days. Before the end of the 30-day window, the incomplete claim (i.e., the Saved (Not Submitted) claim) must be completed and submitted or it will be deleted from the system on the 31st day.

**Slide 14 of 54 - How to Resume Claim Submission**

[About](#) > [CMS Links](#) > [How To](#) > [Reference Materials](#) > [Contact Us](#)

Show Help Page

[Home](#) > [Information Detail](#) > [Claim Listing](#)

August 6, 2024 at 1:01:35 PM

## Claim Listing

This page lists all of the claims you have entered. To search for a specific claim, enter search values into any or all of the search fields, and click on the **Search** button.

---

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.

+ New Claim

RRE ID: 145688

RRE Name: Dynamics Inc

Transactions Remaining: **101**

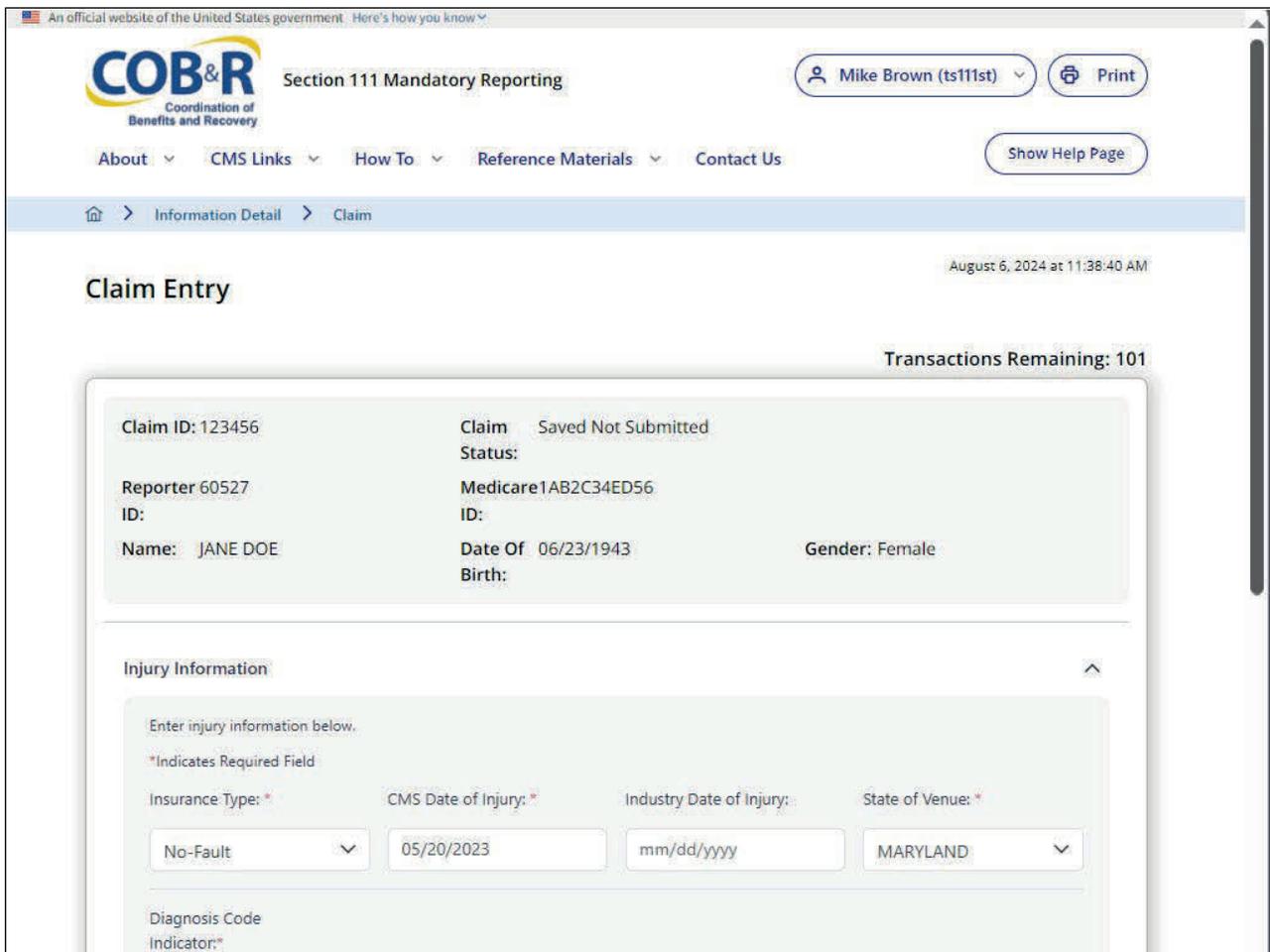
Latest DCN ↑↓	Trn Cnt ↑↓	Policy Number ↑↓	Claim Number ↑↓	Medicare ID ↑↓	Beneficiary Name ↑↓	CMS Date of Injury ↑↓	Initial Entry Date ↑↓	Last Action ↑↓	Status ↑↓	Disposition ↑↓	Actions
Latest DCN	Trn Cnt	Policy Numbe	Claim Numbe	Medicare ID Filtr	Beneficiary Nam	CMS Date of	Initial Entry D	Last Action	Status Filter	Disposition Filter	
10580	1	pn1111	15678000	D1690519212	WANDA CARR	01/01/2011	01/26/2021	Update	Saved Not Submitted		History Delete
10575	9	12345678	15678054	519212	MARY WISE	01/01/2010	12/28/2020	Update	Completed		History Delete
10576	9	914567	15678012	919212	BEN RODGERS	01/01/2010	12/28/2020	Update	Deleted		History
10581	1	5678ABC	15678001	018340998A	FRANK JOBS	01/01/2011	12/28/2020	Update	New		History Delete
10577	9	123456C	15678003	719212	LEWIS CANNON	01/01/2010	12/28/2020	Update	In Process		History Delete

5 rows total.

**Slide notes**

To resume the claims submission process for a claim in Saved (Not Submitted) status, go to the Claim Listing page, locate the specific claim report, and click Latest DCN link for the claim. The Transactions Remaining count will not be impacted.

**Slide 15 of 54 - Injury Information**

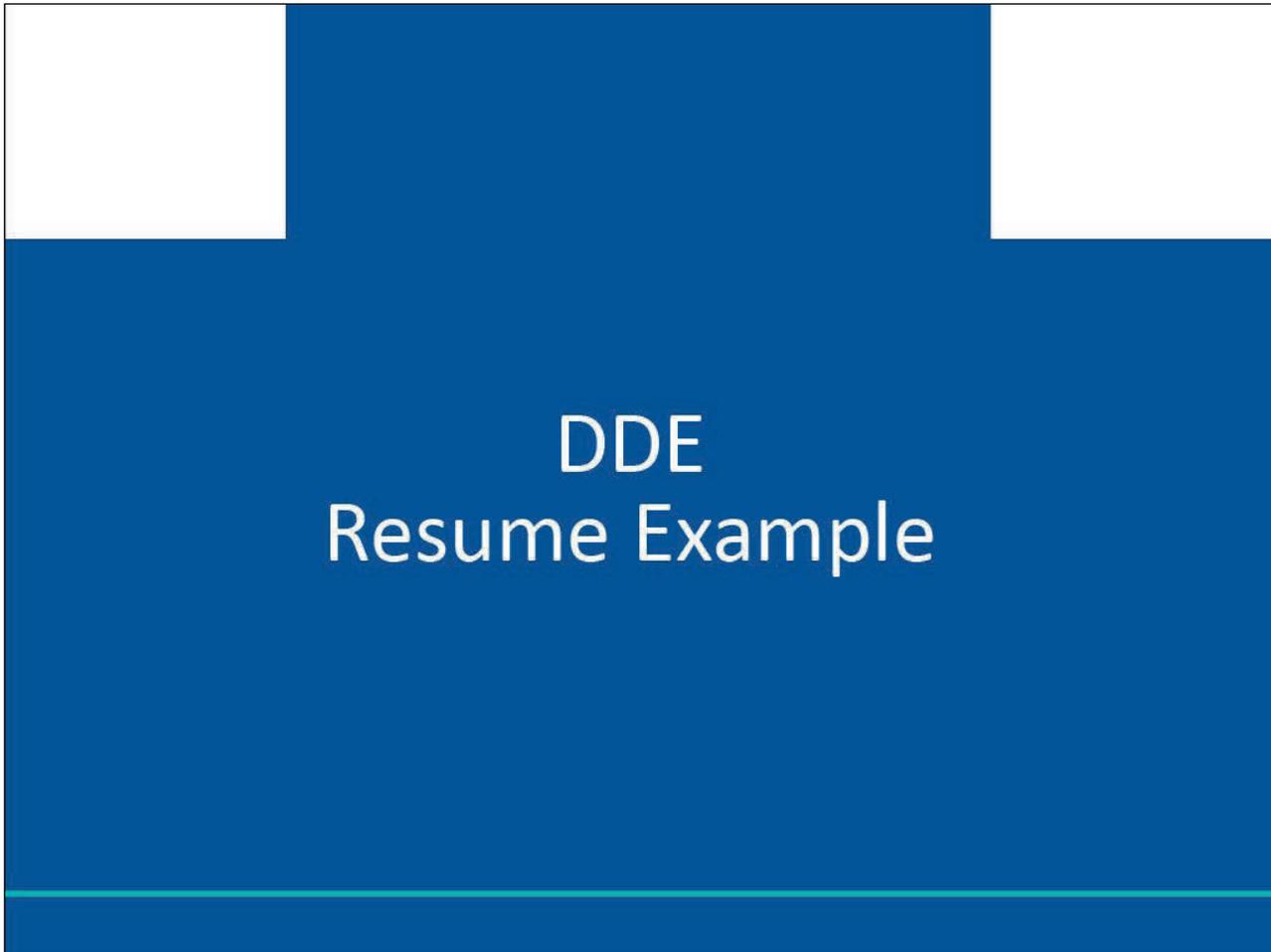


**Slide notes**

The Injury Information page will appear for the selected claim regardless of the last page that was completed and saved. Use the Continue button to access any pages you need to complete, making sure to click [Save] before going to the next page.

After all pages are completed, the Claim Summary page displays where you can submit the claim.

**Slide 16 of 54 - DDE Resume Example**



**Slide notes**

DDE Resume Example

**Slide 17 of 54 - Insurance Information**

**Slide notes**

Let’s say you begin to enter a new DDE claim report. When you get to the Insurance Information page in the New Claim entry process, you realize that you do not have the RRE’s TIN.

Since you need to research this information, you can scroll to the bottom of the page and click Save & Exit to save all of the information you have entered. When you locate the correct RRE TIN, you can complete the New Claim entry.

Note: You can use the Save & Exit option as often as necessary but must remember to submit saved claims within 30 calendar days from the date the claim was first saved.

Saved claims that are not submitted within 30 calendar days will be deleted.

Slide 18 of 54 - Claim Listing

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

Information Detail > Claim Listing

August 6, 2024 at 1:01:35 PM

### Claim Listing

This page lists all of the claims you have entered. To search for a specific claim, enter search values into any or all of the search fields, and click on the **Search** button.

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.

+ New Claim      **RRE ID:** 145688      **RRE Name:** Dynamics Inc      **Transactions Remaining:** 101

Latest DCN ↑↓	Trn Cnt ↑↓	Policy Number ↑↓	Claim Number ↑↓	Medicare ID ↑↓	Beneficiary Name ↑↓	CMS Date of Injury ↑↓	Initial Entry Date ↑↓	Last Action ↑↓	Status ↑↓	Disposition ↑↓	Actions
<input type="text" value="Latest DCN"/>	<input type="text" value="Trn Cnt"/>	<input type="text" value="Policy Numbe"/>	<input type="text" value="Claim Numbe"/>	<input type="text" value="Medicare ID Filtr"/>	<input type="text" value="Beneficiary Namr"/>	<input type="text" value="CMS Date of"/>	<input type="text" value="Initial Entry D"/>	<input type="text" value="Last Action"/>	<input type="text" value="Status Filter"/>	<input type="text" value="Disposition Filter"/>	
<a href="#">10580</a>	1	pn1111	15678000	D1690519212	WANDA CARR	01/01/2011	01/26/2021	Update	Saved Not Submitted		<a href="#">History</a> <a href="#">Delete</a>
<a href="#">10575</a>	9	12345678	15678054	519212	MARY WISE	01/01/2010	12/28/2020	Update	Completed		<a href="#">History</a> <a href="#">Delete</a>
<a href="#">10576</a>	9	914567	15678012	919212	BEN RODGERS	01/01/2010	12/28/2020	Update	Deleted		<a href="#">History</a>
<a href="#">10581</a>	1	5678ABC	15678001	018340998A	FRANK JOBS	01/01/2011	12/28/2020	Update	New		<a href="#">History</a> <a href="#">Delete</a>
<a href="#">10577</a>	9	123456C	15678003	719212	LEWIS CANNON	01/01/2010	12/28/2020	Update	In Process		<a href="#">History</a> <a href="#">Delete</a>

5 rows total.

Slide notes

Once you have the RRE TIN, you can complete the claim by clicking Latest DCN link on the Claim Listing page for the previously saved claim report.

**Slide 19 of 54 - Injury Information**

The screenshot shows a web browser window with the URL "An official website of the United States government". The page title is "Section 111 Mandatory Reporting" under the "COB&R Coordination of Benefits and Recovery" logo. The user is logged in as "Mike Brown (ts111st)". The navigation menu includes "About", "CMS Links", "How To", "Reference Materials", and "Contact Us". The breadcrumb trail is "Information Detail > Claim". The page content includes a "Claim Entry" header with a timestamp "August 6, 2024 at 11:38:40 AM" and "Transactions Remaining: 101". A summary box displays the following claim details:

Claim ID: 123456	Claim Status: Saved Not Submitted	
Reporter ID: 60527	Medicare ID: IAB2C34ED56	
Name: JANE DOE	Date Of Birth: 06/23/1943	Gender: Female

Below this is the "Injury Information" section with a form. The form includes the instruction "Enter injury information below." and a note "\*Indicates Required Field". The form fields are:

- Insurance Type: \* (Dropdown menu with "No-Fault" selected)
- CMS Date of Injury: \* (Text input with "05/20/2023")
- Industry Date of Injury: (Text input with "mm/dd/yyyy")
- State of Venue: \* (Dropdown menu with "MARYLAND" selected)
- Diagnosis Code Indicator: \* (Text input)

**Slide notes**

The Injury Information page will appear for the selected claim, regardless of the last page that was completed and saved. Continue to click Continue until you arrive at the Insurance Information page.

**Slide 20 of 54 - Insurance Information**

Insurance Information

Enter insurance information below.

\*indicates required field

Does the reportable event involve self-insurance?  Yes  No Self-Insured Type: Not Defined

RRE TIN: 413245687 Policy Number: Claim Number:

RRE Mailing Address Information

Name: Foreign Address 1:

Address 1: Foreign Address 2:

Address 2: Foreign Address 3:

City: State: Foreign Address 4:

Zip:

Plan Contact Information

Department Name: First Name: Last Name: Phone: Ext:

**Slide notes**

Enter the TIN, making sure to click Save before going to the next page. Advance to the Claim Summary page.

**Slide 21 of 54 - Claim Summary**

**Claim Summary**

Please review your claim information. If you need to change any information, select the section name above for the information you wish to change and then proceed through the remaining sections back to the "Claim Summary" to submit. You may want to print this page for your records.

**Injured Party**

Claim ID: 123456	Claim Status: Saved Not Submitted	
Reporter ID: 60527	Medicare ID: 1AB2C34ED56	
Name: JANE DOE	Date Of Birth: 06/23/1943	Gender: Female

**Injury Information**

Insurance Type: No-Fault	CMS Date of Injury: 05/20/2023	Alleged Cause of Injury Diagnosis:
Industry Date of Injury:	State of Venue: MARYLAND	

**Diagnosis Codes**

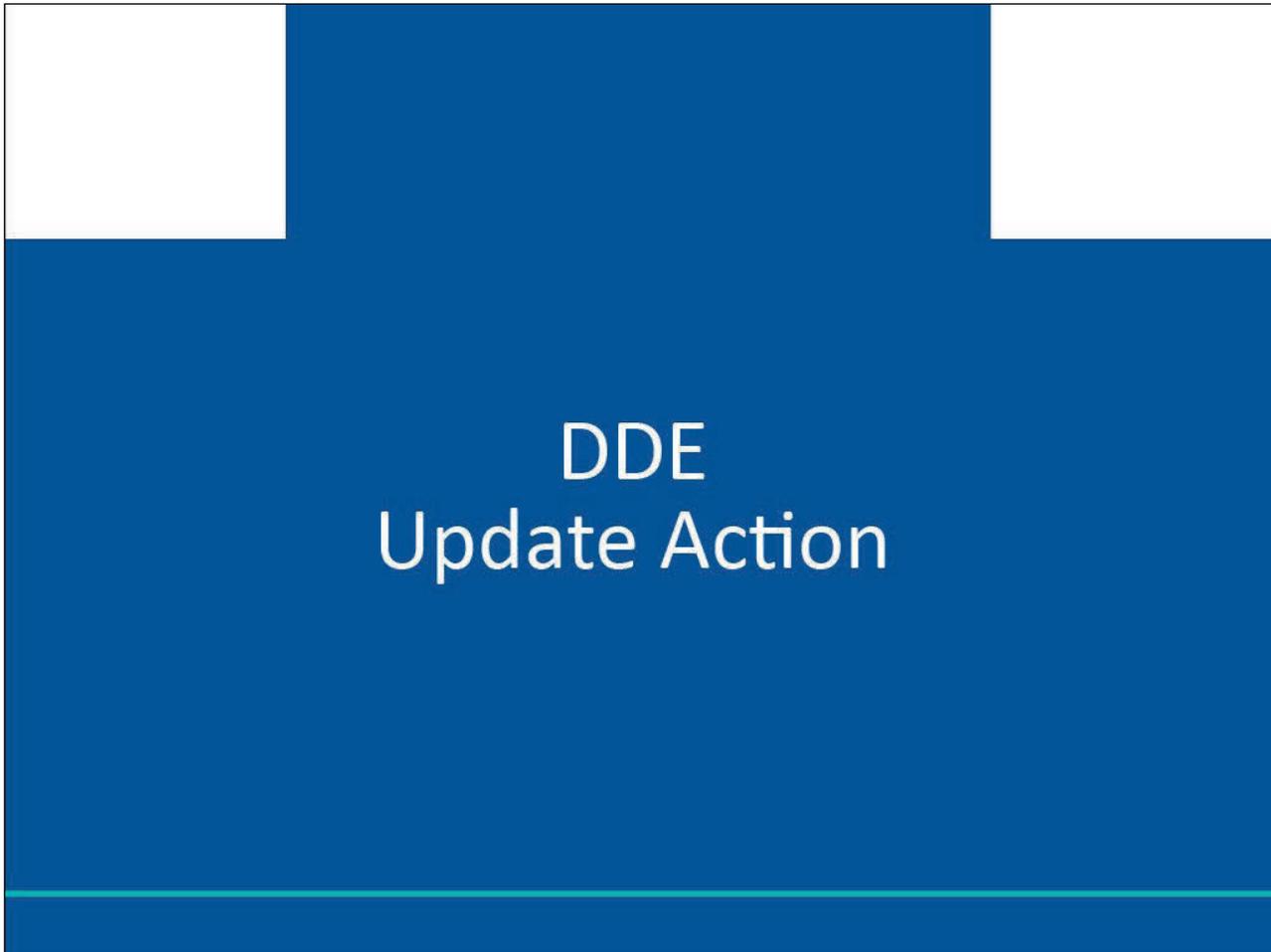
Diagnosis 1: M9900
Diagnosis 2: 92820

**ORM and TPOC Information**

**Slide notes**

When the Claim Summary page displays, verify that all information has been entered completely and accurately and then scroll to the bottom of the page and click Submit Claim.

**Slide 22 of 54 - DDE Update Action**



**Slide notes**

DDE Update Action

**Slide 23 of 54 - When to Submit an Update**

## When to Submit an Update

- For claim reports that received an SP Disposition Code
- For open ORM claims which previously received 03 Disposition Code when the injured party becomes covered by Medicare
- To modify information critical to Medicare claims payment and recovery
- Required if **critical** fields are modified
  - ICD Diagnosis Codes
  - TIN
  - TPOC Date(s) and/or TPOC Amount(s)
  - Claimant Information
  - ORM Termination Date
- Note: When data in **key** data field changes, you will not submit an update
  - Previously accepted claim report must be deleted
  - New claim report must be added with corrected information

**Slide notes**

An update should be submitted for claim reports that received an SP Disposition Code once the claim has been corrected, for open Ongoing Responsibility for Medicals (ORM) claims which previously received a 03 Disposition Code (i.e., claim report for individual matched to a Medicare beneficiary but outside Medicare coverage period), when the injured party becomes covered by Medicare; and, to modify information critical for use by Medicare in its claims payment and recovery processes.

If information in a critical data field changes on any previously submitted and accepted claim report that received a 01 or 02 disposition, you must modify the claim report immediately.

The following are critical data fields: ICD (International Classification of Diseases) Diagnosis Codes, TIN (Tax Identification Number), TPOC (Total Payment Obligation to Claimant) Date(s) and/or TPOC Amount(s), Claimant Information, and ORM Termination Date. You are not required to send updated information for other fields.

For additional information on Disposition or Error Codes, please refer to the NGHP User Guide.

Please note: When data in one or more of the key fields that are used to uniquely identify claims on a previously accepted claim report needs to be corrected, you will not update the claim.

In this case, the previously accepted claim report must be deleted, and a new claim must be added with the corrected information.

**Slide 24 of 54 - How to Submit an Update**

[About](#) > [CMS Links](#) > [How To](#) > [Reference Materials](#) > [Contact Us](#)

Show Help Page

[Home](#) > [Information Detail](#) > [Claim Listing](#)

August 6, 2024 at 1:01:35 PM

## Claim Listing

This page lists all of the claims you have entered. To search for a specific claim, enter search values into any or all of the search fields, and click on the **Search** button.

---

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.

+ New Claim

RRE ID: 145688

RRE Name: Dynamics Inc

Transactions Remaining: **101**

Latest DCN ↑↓	Trn Cnt ↑↓	Policy Number ↑↓	Claim Number ↑↓	Medicare ID ↑↓	Beneficiary Name ↑↓	CMS Date of Injury ↑↓	Initial Entry Date ↑↓	Last Action ↑↓	Status ↑↓	Disposition ↑↓	Actions
Latest DCN	Trn Cnt	Policy Numbe	Claim Numbe	Medicare ID Filtr	Beneficiary Nam	CMS Date of	Initial Entry D	Last Action	Status Filter	Disposition Filter	
<a href="#">10580</a>	1	pn1111	15678000	D1690519212	WANDA CARR	01/01/2011	01/26/2021	Update	Saved Not Submitted		<a href="#">History</a> <a href="#">Delete</a>
<a href="#">10575</a>	9	12345678	15678054	519212	MARY WISE	01/01/2010	12/28/2020	Update	Completed		<a href="#">History</a> <a href="#">Delete</a>
<a href="#">10576</a>	9	914567	15678012	919212	BEN RODGERS	01/01/2010	12/28/2020	Update	Deleted		<a href="#">History</a>
<a href="#">10581</a>	1	5678ABC	15678001	018340998A	FRANK JOBS	01/01/2011	12/28/2020	Update	New		<a href="#">History</a> <a href="#">Delete</a>
<a href="#">10577</a>	9	123456C	15678003	719212	LEWIS CANNON	01/01/2010	12/28/2020	Update	In Process		<a href="#">History</a> <a href="#">Delete</a>

5 rows total.

**Slide notes**

When an update is required, go to the Claim Listing page, locate the specific claim report and click the Latest DCN link for the corresponding claim.

If the claim report selected is in a New Status, the Transactions Remaining count will not be impacted. If the claim report selected is in a Completed Status, the Transactions Remaining count will be decreased by one.

Please Note: If a claim report is returned to you with an SP Disposition Code and associated error and subsequently you update and re-submit this report to correct the error, the Transactions Remaining count will not decrease.

**Slide 25 of 54 - Claim Summary**

**Claim Summary** ^

Please review your claim information. If you need to change any information, select the section name above for the information you wish to change and then proceed through the remaining sections back to the "Claim Summary" to submit. You may want to print this page for your records.

**Injured Party**

Claim ID: 123456	Claim Status: Saved Not Submitted	
Reporter ID: 60527	Medicare ID: 1AB2C34ED56	
Name: JANE DOE	Date Of Birth: 06/23/1943	Gender: Female

**Injury Information**

Insurance Type: No-Fault	CMS Date of Injury: 05/20/2023	Alleged Cause of Injury Diagnosis:
Industry Date of Injury:	State of Venue: MARYLAND	

---

**Diagnosis Codes**

Diagnosis 1: M9900  
Diagnosis 2: 92820

**ORM and TPOC Information**

**Slide notes**

Once the DCN link is selected, the Claim Summary page will display a detailed view of all information that was previously entered for the selected claim report. A section of this page is displayed here.

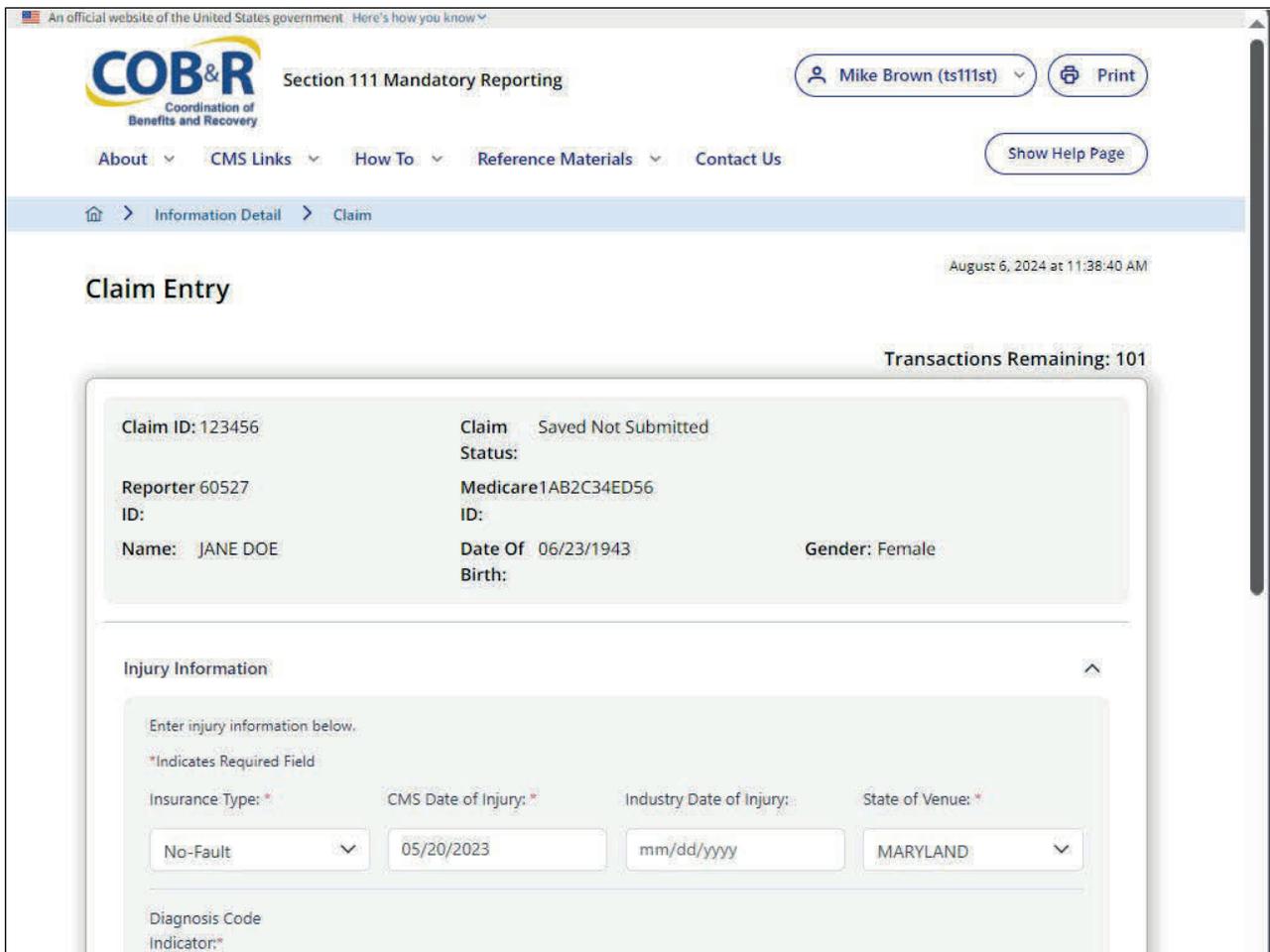
You may not edit the Injured Party Information because these fields are considered key data fields.

If data needs to be changed for any of these fields, delete the original claim report and add a New Claim report with the corrected information.

You may edit information on all other pages with the exception of the Insurance Type and CMS Date of Injury fields.

To begin the edit process, click Edit next to the Injury section. This will return you to the Injury Information page.

### Slide 26 of 54 - Injury Information



#### Slide notes

When the Injury Information page displays, all fields will be open for editing except for the Insurance Type and CMS Date of Injury fields if the claim is in Completed or In Process status.

Once you are on this page, you can advance to any page that needs corrections. After making the necessary changes, click Save to save the changes, and then click Continue until you navigate back to the Claim Summary page.

Note: Save & Exit will save what you have entered on the current page and return you to the Claim Listing page.

**Slide 27 of 54 - Claim Summary**

**Representative Information**

Type:	Other	Representative:	45 Testing Way
TIN:	545554555	Address:	Baltimore, MD 21222 - 5225
Representative Name:	First Last	Representative Phone:	(232) 252-2522
Firm Name:			

**Claimant and Claimant Representative Information**

Claimant 1		Claimant Representative 1	
Relationship:	Family Member, Individual Name Provided	Address:	98 Testing Lane, Baltimore, MARYLAND 14542 - 2121
Name:	first Last	TIN:	658425545
TIN:	0	Firm Name:	Attorneys Name
Org. Name:		Phone:	(251) 414-2552

Submit Claim

Cancel

Save

Save & Exit

**Slide notes**

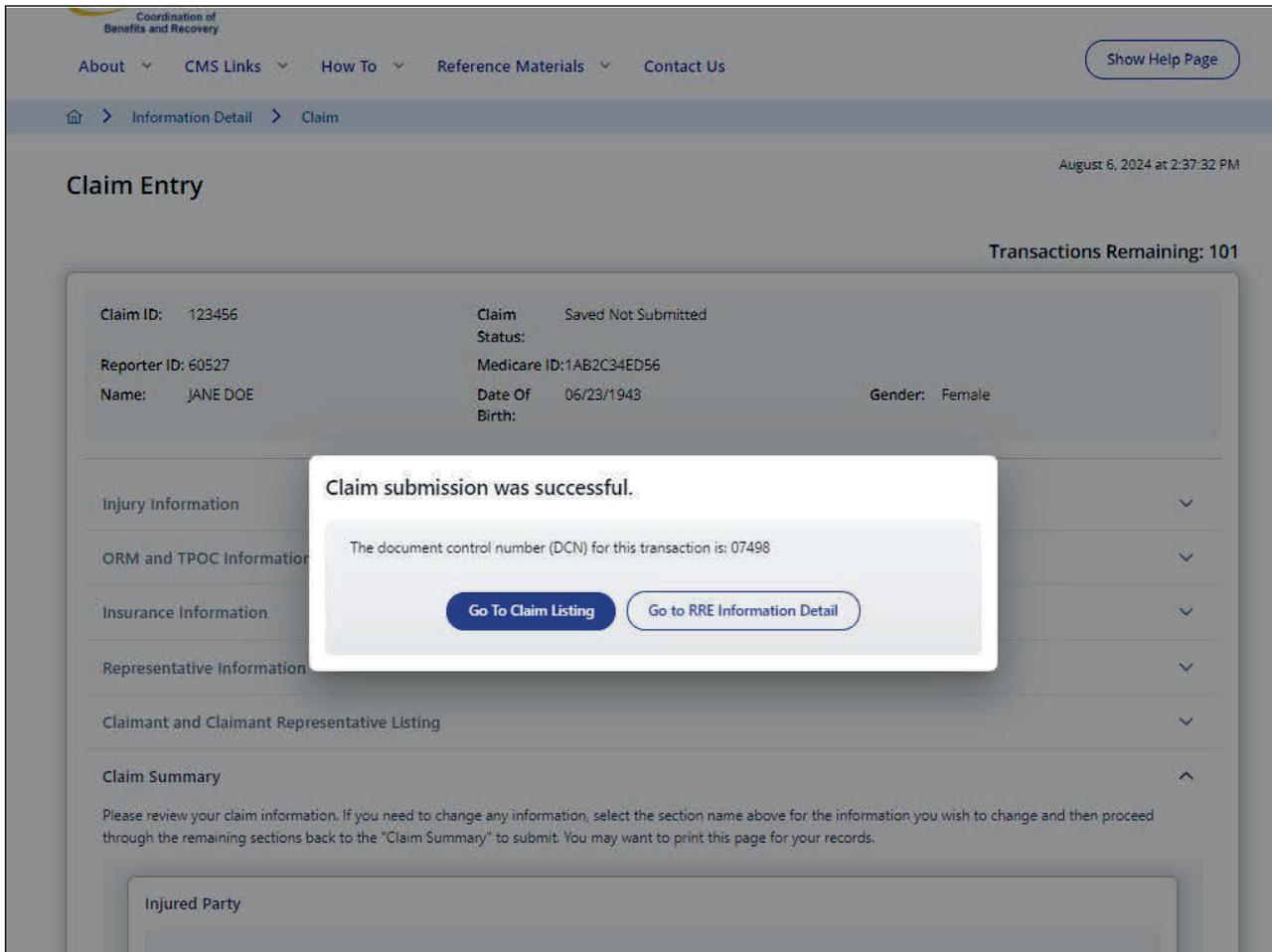
When you have returned to the Claim Summary page, verify that all updates have been made and then scroll to the bottom of the Claim Summary page.

If you want to save the claim and submit it at a later time, click Save. To submit the claim, click Submit Claim.

Note: If you click [Cancel], and have no changes pending (i.e., you saved your changes), the system will bring you directly to the Claim Listing page.

If you click Cancel and you have not yet saved your changes, the Cancel Edit page displays. If you click Cancel on this page, the modifications you made will be lost.

**Slide 28 of 54 - Claim Submission was Successful**

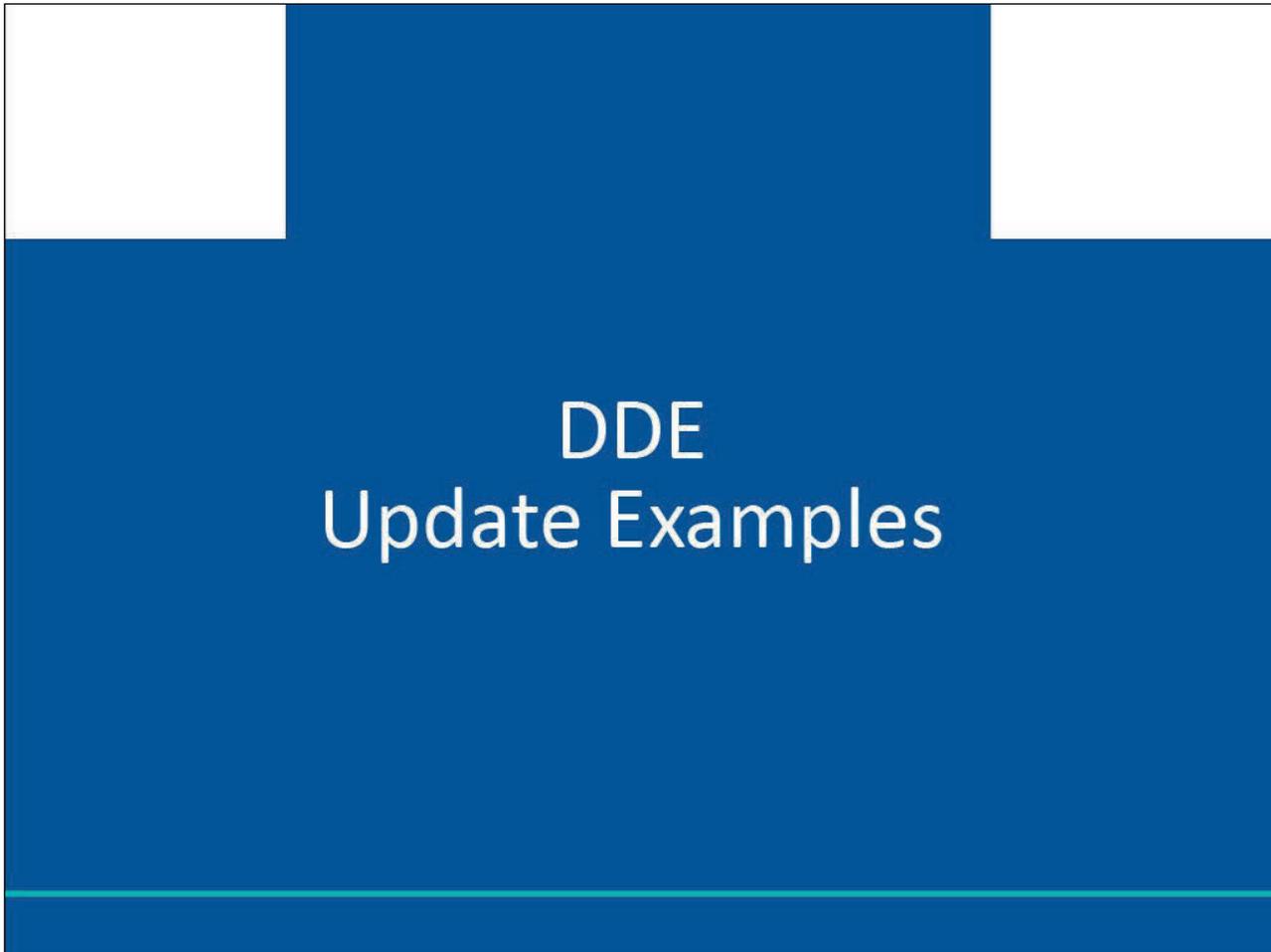


**Slide notes**

Once the claim has been submitted, the system will display the “Claim submission was successful” message.

Retain the Document Control Number (DCN) for your records. The DCN will be helpful if you need to search for the claim at a later time. Click Go To Claim Listing to return to the Claim Listing page or click Go to RRE Information Detail to return to the RRE Information Detail page.

**Slide 29 of 54 - DDE Update Examples**



**Slide notes**

DDE Update Examples

**Slide 30 of 54 - SP Disposition Code Example**

## SP Disposition Code Example

- Submitted claim report processes with an SP Disposition
  - Must be corrected and re-submitted
- To submit the required update
  - Go to Claim Listing page and click the Latest DCN link
  - Click [Edit] next to the page that requires the correction
  - Advance to any page that needs corrections
  - Once the revision has been made, click [Save] to save the changes and then Continue to navigate back to the Claim Summary page

**Slide notes**

Let's say you submit a claim report that processes with an SP Disposition. Since the claim report was not accepted due to errors, you must correct and re-submit it.

To submit the required update, go to the Claim Listing page and click the Latest DCN link for the specific claim report. When the Claim Summary page displays, click Edit for the page that requires a correction.

The selected page will appear with all fields open for editing except for the Insurance Type and Date of Injury.

Once the correction has been made, click Save to save the changes and then click Continue to navigate back to the Claim Summary page.

Slide 31 of 54 - Claim Summary

**Representative Information**

Type:	Other	Representative Address:	45 Testing Way Baltimore, MD 21222 - 5225
TIN:	545554555	Representative Name:	(232) 252-2522
Representative Name:	First Last	Phone:	
Firm Name:			

**Claimant and Claimant Representative Information**

Claimant 1		Claimant Representative 1	
Relationship:	Family Member, Individual Name Provided	Type:	Attorney
Name:	first Last	Name:	Address: 98 Testing Lane Baltimore, MARYLAND 14542 - 2121
TIN:	0	TIN:	658425545
Org. Name:		Firm Name:	Attorneys Name
Address:	47 Test Baltimore, MARYLAND 14124 - 2222	Phone:	(251) 414-2552
Phone:	(255) 553-5523 ext. 2322		

**Bottom of Claim Summary Screen**

Submit Claim

Cancel Save Save & Exit

Slide notes

When the Claim Summary page displays, you have the option to save the claim report and submit it at a later time, cancel all updates made since the last time the claim report was saved, or to submit the claim report.

Once the claim is submitted, retain the updated DCN for your records.

**Slide 32 of 54 - ORM and TPOC Information**

ORM and TPOC Information

Enter ORM (Ongoing Responsibility for Medicals) and TPOC (Total Payment Obligation of Claimant) information below.

\* Indicates required field

ORM Indicator:\*  Yes  No

Is the ORM terminated?:\*  Yes  No

ORM Termination Date:\*

There are strict requirements on the types of information that can be entered in the TPOC fields. Please click here for help.

	TPOC Date:	TPOC Amount(\$):	Funding Delayed Beyond TPOC Start Date:
1.	<input type="text" value="05/21/2023"/>	<input type="text" value="150.00"/>	<input type="text" value="05/21/2023"/>
2.	<input type="text" value="05/21/2023"/>	<input type="text" value="55.00"/>	<input type="text" value="05/21/2023"/>
3.	<input type="text" value="mm/dd/yyyy"/>	<input type="text" value="0000000.00"/>	<input type="text" value="mm/dd/yyyy"/>
4.	<input type="text" value="mm/dd/yyyy"/>	<input type="text" value="0000000.00"/>	<input type="text" value="mm/dd/yyyy"/>
5.	<input type="text" value="mm/dd/yyyy"/>	<input type="text" value="0000000.00"/>	<input type="text" value="mm/dd/yyyy"/>

Insurance Information

Representative Information

**Slide notes**

If the submitted claim report with a 03 Disposition Code did not have ORM, you are required to submit an update only if there is a subsequent TPOC.

From the Claim Summary page for the affected claim report, click the Edit button for the ORM and TPOC Information page.

When the ORM and TPOC Information page displays, add the new TPOC Date and TPOC Amount in the first available TPOC fields.

All other data elements should remain as they were originally submitted, including the ORM Indicator set to No.

Once the data has been entered, click [Save] to save the changes and then click [Next] to navigate back to the Claim Confirmation page where you can either save the claim to submit it at a later time, or you can submit the claim.

Note: Enter the date the ORM ended, if applicable. This field is enabled only if ORM Terminated is set to Yes.

The ORM Termination Date must be greater than the CMS Date of Injury. Future dates are accepted.

Note: To address situations where Responsible Report Entities (RREs) can identify future ORM termination dates based on terms of the insurance contract, RREs can now enter a future Ongoing Responsibility for Medicals (ORM) Termination Date (Field 79) up to 75 years from the current date.

**Slide 33 of 54 - 03 Disposition Code - ORM Example**

## 03 Disposition Code - ORM Example

- Claim report must be resubmitted at regular intervals
  - Once per quarter until ORM ends to see if the beneficiary became entitled to Medicare
  - From Claim Listing page, click the Latest DCN link for the specific claim report

**Slide notes**

If the submitted claim report with a 03 Disposition Code did have ORM, you must resubmit the claim at regular intervals, once per quarter until ORM ends, to see if the beneficiary has subsequently become entitled to Medicare, at which point they would receive a 01 Disposition.

To submit the required update, go to the Claim Listing page and click the Latest DCN link for the specific claim report.

**Slide 34 of 54 - Claim Summary - Submit Claim**

**Representative Information**

Type:	Other	Representative	45 Testing Way
TIN:	545554555	Address:	Baltimore, MD 21222 - 5225
Representative Name:	First Last	Representative	(232) 252-2522
Firm Name:		Phone:	

**Claimant and Claimant Representative Information**

Claimant 1		Claimant Representative 1	
Relationship:	Family Member, Individual Name Provided	Type:	Attorney
Name:	first Last	Name:	
TIN:	0	TIN:	658425545
Org. Name:		Firm Name:	Attorneys Name
Address:	47 Test, Baltimore, MARYLAND 14124 - 2222	Address:	98 Testing Lane, Baltimore, MARYLAND 14542 - 2121
Phone:	(255) 553-5523 ext. 2322	Phone:	(251) 414-2552

**Submit Claim**

Cancel Save Save & Exit

**Slide notes**

When the Claim Summary page displays, scroll to the bottom of the page and click Submit Claim.

**Slide 35 of 54 - Critical Data Fields - Example**

## Critical Data Fields - Example

- Workers' Compensation claim report with ORM was submitted and accepted
  - ORM ends 08/30/2011, you must update claim report
  - From the Claim Summary page for the affected claim report, click Edit button for the ORM and TPOC Information section

**Slide notes**

Let's say you submitted a DDE Workers' Compensation claim report, that was accepted. The RRE assumed ORM (i.e., ORM Indicator = 'Y') on this claim report.

The RRE's ongoing responsibility will end on August 30, 2011. You must update the previously accepted claim report with the ORM Termination Date.

From the Claim Summary page for the affected claim report, click Edit button for the ORM and TPOC Information section.

**Slide 36 of 54 - ORM and TPOC Information**

The screenshot shows a web form titled "ORM and TPOC Information". At the top, it says "Enter ORM (Ongoing Responsibility for Medicals) and TPOC (Total Payment Obligation of Claimant) information below." Below this is a note: "\* Indicates required field".

There are three main sections:

- ORM Indicator:** A radio button labeled "Yes" is selected, and a radio button labeled "No" is unselected.
- Is the ORM terminated?:\*** A red box highlights this section. A radio button labeled "Yes" is selected, and a radio button labeled "No" is unselected.
- ORM Termination Date:\*** A text input field contains the date "08/30/2011".

Below these is a note: "There are strict requirements on the types of information that can be entered in the TPOC fields. Please click here for help." Below this is a table with three columns: "TPOC Date:", "TPOC Amount(\$):", and "Funding Delayed Beyond TPOC Start Date:". There are five rows, numbered 1 through 5, each with three empty input fields. At the bottom of the form is a blue "Continue" button.

At the bottom of the page, there are two expandable sections: "Insurance Information" and "Representative Information", both with downward-pointing chevrons.

**Slide notes**

When the ORM and TPOC Information page displays, first click Yes for “Is the ORM Terminated?” Next, enter 08302011 in the ORM Termination Date.

All other data elements should remain as they were originally submitted.

Once the data has been entered, click Save to save the changes and then click Continue to navigate back to the Claim Summary page where you can either save the claim to submit it at a later time, or you can submit the claim.

**Slide 37 of 54 - ORM and TPOC Information**

ORM and TPOC Information

Enter ORM (Ongoing Responsibility for Medicals) and TPOC (Total Payment Obligation of Claimant) information below.

\* Indicates required field

ORM Indicator:\*  
 Yes  No

Is the ORM terminated?:\*  
 Yes  No

ORM Termination Date:\*

There are strict requirements on the types of information that can be entered in the TPOC fields. Please click [here](#) for help.

	TPOC Date:	TPOC Amount(\$):	Funding Delayed Beyond TPOC Start Date:
1.	<input type="text"/>	<input type="text"/>	<input type="text"/>
2.	<input type="text"/>	<input type="text"/>	<input type="text"/>
3.	<input type="text"/>	<input type="text"/>	<input type="text"/>
4.	<input type="text"/>	<input type="text"/>	<input type="text"/>
5.	<input type="text"/>	<input type="text"/>	<input type="text"/>

Continue

Insurance Information

Representative Information

**Slide notes**

If the RRE reassumes ORM for this claim report at a later date, you will again update the ORM and TPOC Information page.

When the ORM and TPOC Information page displays, click No in the “Is the ORM Terminated?” field which will erase the ORM Termination Date. You must then save your changes and submit the claim.

**Slide 38 of 54 - Injury Information - Diagnosis Codes**

Insurance Type: \* No-Fault

CMS Date of Injury: \* 05/20/2023

Industry Date of Injury: mm/dd/yyyy

State of Venue: \* MARYLAND

Diagnosis Code Indicator: \*  ICD-9  ICD-10

Alleged Cause of Injury: Diagnosis Code: W2211XA

Diagnosis Codes (Up to 19):

Code	Description	Remove
M9900	Segmental and somatic dysfunction of head region	X

ORM and TPOC Information

Insurance Information

Representative Information

Claimant and Claimant Representative Listing

Claim Summary

**Slide notes**

When an additional Diagnosis Code needs to be added, you are required to update the claim report. To make this change, go to the Claim Summary page for the affected claim report and click Edit next to the Injury heading.

When the Injury Information page displays, enter the new Diagnosis Code and click Add. You can use the search fields to Search to find the correct Diagnosis Code.

Once the data has been entered, click Save to save the changes and then click Continue to navigate back to the Claim Summary page where you can either save the claim to submit it at a later time, or you can submit the claim.

Note: You cannot submit a combination of ICD-9 and ICD-10 diagnosis codes on one claim.

If you need to change the selected Diagnosis Code Indicator, you must first delete all existing diagnosis codes before you will be allowed to change the Diagnosis Code Indicator.

**Slide 39 of 54 - Injury Information - Remove Diagnosis Code**

The screenshot shows a web form for 'Injury Information'. At the top, there are four fields: 'Insurance Type:' with a dropdown menu set to 'No-Fault', 'CMS Date of Injury:' with the date '05/20/2023', 'Industry Date of Injury:' with a date input field 'mm/dd/yyyy', and 'State of Venue:' with a dropdown menu set to 'MARYLAND'. Below these is a 'Diagnosis Code Indicator:' section with radio buttons for 'ICD-9' and 'ICD-10', where 'ICD-10' is selected. Underneath is an 'Alleged Cause of Injury, Diagnosis Code:' section with the code 'W2211XA' and a 'Remove Code' button. Below that is a 'Diagnosis Codes (Up to 19):' section with an 'Add' button and a table. The table has three columns: 'Code', 'Description', and 'Remove'. The first row contains 'M9900', 'Segmental and somatic dysfunction of head region', and 'X'. The 'Remove' button in this row is highlighted with a red box. At the bottom of the table is a 'Continue' button. Below the table are several expandable sections: 'ORM and TPOC Information', 'Insurance Information', 'Representative Information', 'Claimant and Claimant Representative Listing', and 'Claim Summary'. At the very bottom of the form are three buttons: 'Cancel', 'Save', and 'Save & Exit'.

**Slide notes**

If a previously submitted and accepted claim report includes a Diagnosis Code that is later determined to not apply, or no longer applies to the claim, it must be removed.

In this case, you are again required to update the Injury Information page. Once on the Injury Information page, click the [X] next to the invalid Diagnosis Code.

Once all changes have been made, save your changes and submit the claim report.

**Slide 40 of 54 - DDE Delete Action**



**Slide notes**

DDE Delete Action

**Slide 41 of 54 - When to Submit a Delete**

## When to Submit a Delete

- To remove a Saved (Not Submitted) claim report that was entered in error
- To remove claim information previously accepted but the claim report was submitted in error
- To correct data in one or more key fields used to uniquely identify claims on a previously accepted claim report

**Slide notes**

The Delete Action should only be used in the following situations:

- To remove a Saved (Not Submitted) claim report that was entered in error;
- To remove claim information that was previously submitted and accepted by the Benefits Coordination & Recovery Center (BCRC) (i.e., the claim report received a 01 or 02 Disposition), but the original claim report was submitted in error (e.g., the claim was not actually settled); and
- To correct data in one or more of the key fields that are used to uniquely identify claims on a previously accepted claim report.

**Slide 42 of 54 - Correcting Key Data Fields**

## Correcting Key Data Fields

- Medicare stores information on claims using key data fields
- If a change is required to a key data field
  - Delete the original claim report
  - Submit a New Claim with corrected data
- Key data fields
  - Injured Party Medicare ID or SSN
  - CMS Date of Incident
  - Plan Insurance Type (Liability, No-Fault, Workers' Compensation)
  - ORM Indicator
- If any other field needs to be corrected or changed
  - Simply update the claim report to modify the non-key field

**Slide notes**

Medicare stores information on claims using key data fields. If you need to change data in any of the following key data fields, you must delete the original claim report and submit a New Claim with the corrected data:

- Injured Party Medicare ID or Social Security Number (SSN),
- CMS Date of Incident,
- Plan Insurance Type (i.e., Liability, No-Fault, Workers' Compensation), and
- ORM Indicator.

If any other field needs to be corrected or changed, do not delete the claim report. Simply update the claim report to modify the non-key field as described previously.

**Slide 43 of 54 - How to Submit a Delete**

The screenshot shows a web interface for 'Claim Listing'. At the top, there are navigation links: 'About', 'CMS Links', 'How To', 'Reference Materials', and 'Contact Us'. A 'Show Help Page' button is in the top right. Below the navigation is a breadcrumb trail: 'Information Detail > Claim Listing'. The main heading is 'Claim Listing' with a timestamp 'August 6, 2024 at 1:01:35 PM'. A blue callout box with white text says 'How to Submit a Delete'. Below this, there are instructions: 'This page lists all of the claims you have entered. To search for a specific claim, enter search values into any or all of the search fields, and click on the Search button.' and '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.' and '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.' A 'Clear' button is visible. Below the instructions is a table with columns: Latest DCN, Trn Cnt, Policy Number, Claim Number, Medicare ID, Beneficiary Name, CMS Date of Injury, Initial Entry Date, Last Action, Status, Disposition, and Actions. The table has 5 rows of data. A red box highlights the 'Actions' column, which contains 'History' and 'Delete' links for each row. Above the table, there are filters for 'RRE ID: 145688', 'RRE Name: Dynamics Inc', and 'Transactions Remaining: 101'. A '+ New Claim' button is on the left.

Latest DCN	Trn Cnt	Policy Number	Claim Number	Medicare ID	Beneficiary Name	CMS Date of Injury	Initial Entry Date	Last Action	Status	Disposition	Actions
10580	1	pn1111	15678000	D1690519212	WANDA CARR	01/01/2011	01/26/2021	Update	Saved Not Submitted		History Delete
10575	9	12345678	15678054	519212	MARY WISE	01/01/2010	12/28/2020	Update	Completed		History Delete
10576	9	914567	15678012	919212	BEN RODGERS	01/01/2010	12/28/2020	Update	Deleted		History
10581	1	5678ABC	15678001	018340998A	FRANK JOBS	01/01/2011	12/28/2020	Update	New		History Delete
10577	9	123456C	15678003	719212	LEWIS CANNON	01/01/2010	12/28/2020	Update	In Process		History Delete

5 rows total.

**Slide notes**

From the Claim Listing page, click the [Delete] Action for the specific claim report.

Please Note: If the Claim Report selected is in a Completed status, the Transactions Remaining count will be decreased by one.

If the claim report selected is in a New status, the Transactions Remaining count will not be impacted.

Slide 44 of 54 - Claim Listing - Delete Claim

The screenshot shows the 'Claim Listing' page in the COB&R system. A pop-up dialog titled 'Delete Claim?' is displayed over a table of claims. The dialog contains the following text: 'Deleting a claim will reduce your transactions remaining by one. Are you certain you wish to delete the claim for injured party FRANK JOBS, claim number: 15678001?'. Below the text are 'Cancel' and 'Delete' buttons. The background table shows columns for Latest DCN, Transaction Count, Policy Number, and various claim details. The 'Delete' button is highlighted on the row for claim number 15678001.

Latest DCN	Transaction Count	Policy Number	Claim Number	Injured Party	Effective Date	Expiration Date	Action	Status	Disposition	Actions
10580	1	pn1111	15678000	WANDA CARR	01/01/2011	01/26/2021	Update	Saved Not Submitted		History Delete
10575	9	12345678	15678054	MARY WISE	01/01/2010	12/28/2020	Update	Completed		History Delete
10576	9	914567	15678012	BEN RODGERS	01/01/2010	12/28/2020	Update	Deleted		History
10581	1	5678ABC	15678001	FRANK JOBS	01/01/2011	12/28/2020	Update	New		History Delete
10577	9	123456C	15678003	LEWIS CANNON	01/01/2010	12/28/2020	Update	In Process		History Delete

Slide notes

When the Delete Action is clicked, the system will display the Delete Claim pop-up where you must confirm the delete.

If you click Delete, the claim report will be marked as deleted and the Deletion Confirmed pop-up will display an updated Document Control Number, which should be saved for your records.

The previous DCN is no longer valid for the claim record. Click Close to return to the Claim Listing page.

**Slide 45 of 54 - How to View a Deleted Claim**

## How to View a Deleted Claim

- Information for deleted DDE claim reports can be viewed on the Section 111 COBSW
- To view deleted claim information
  - Click the [View] link in the Actions field for the claim
- After viewing the deleted claim information, click [Cancel] to return to the Claim Listing page

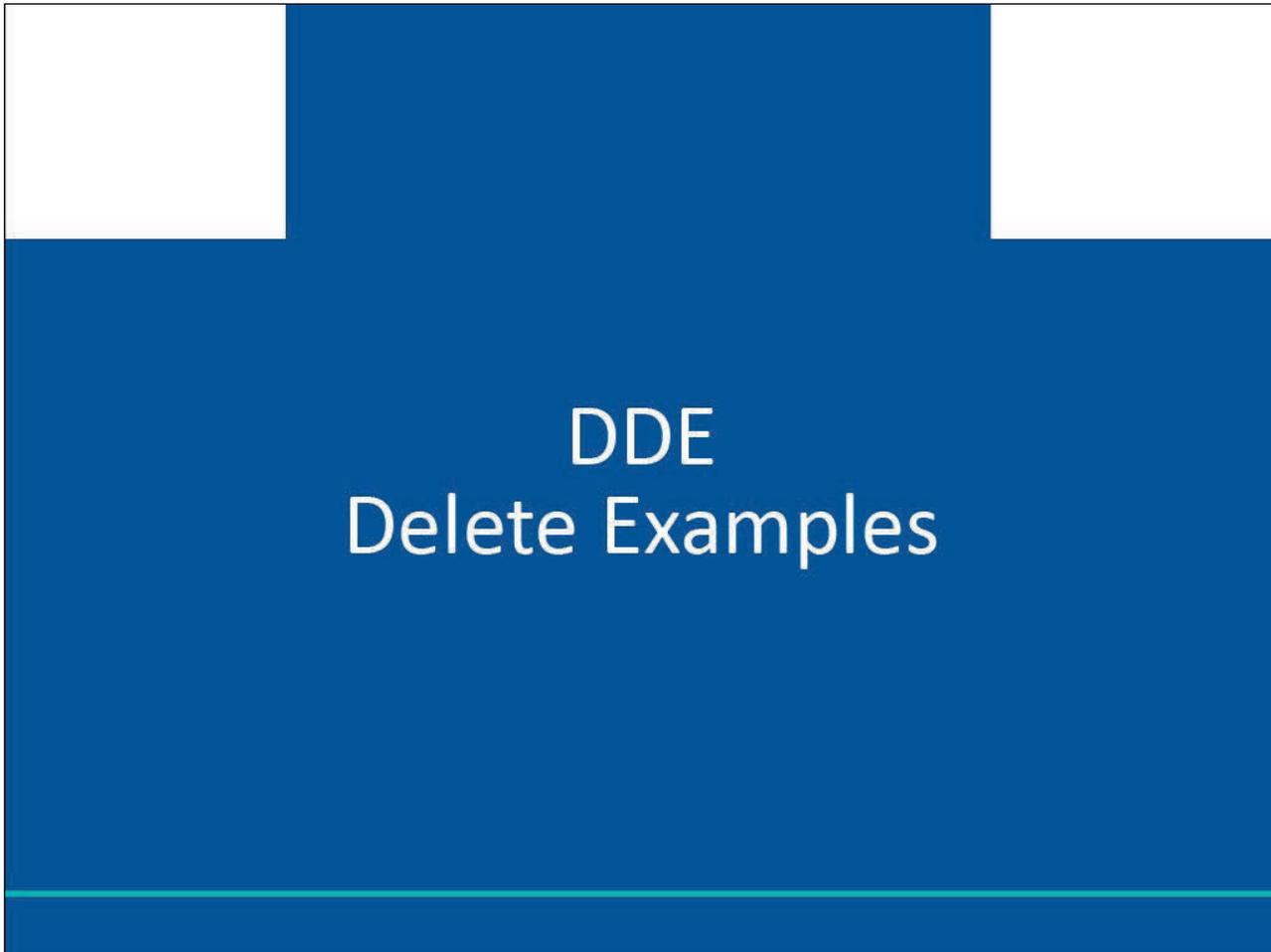
**Slide notes**

The information entered for DDE claim reports that were Deleted can still be viewed on the Section 111 COBSW.

To view deleted claim information, go to the Claim Listing page and click the Latest DCN Link for the particular claim. The Claim Summary page will then display information for the deleted claim, with all fields locked for editing.

After viewing the deleted claim information, click Cancel to return to the Claim Listing page.

**Slide 46 of 54 - DDE Delete Examples**



**Slide notes**

DDE Delete Examples

**Slide 47 of 54 - Key Data Fields - Example**

## Key Data Fields - Example

- Claim report with ORM was submitted and accepted with a 01 Disposition Code
- Subsequently, the RRE changes the CMS Date of Incident, a key data field
  - Previously added claim report must be deleted
  - New Claim must be added with correct CMS Date of Incident
- Delete should only be used to
  - Remove an entire record that was created in error or
  - Correct a key field

**Slide notes**

A claim report was submitted for a liability insurance claim with ORM by an RRE. It was accepted with a 01 Disposition Code (i.e., claim accepted and ORM).

Subsequently, the RRE changes the CMS Date of Incident (DOI) in its internal system.

Because the CMS Date of Incident is a key data field, the RRE must delete the previously added claim report and add a new claim report with the correct CMS Date of Incident.

Note: [Delete] should only be used to remove an entire record that was created in error or to correct a key field. The use of the [Delete] button will remove all previously entered data.

**Slide 48 of 54 - Claim Listing - Delete**

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August 6, 2024 at 1:01:35 PM

## Claim Listing

This page lists all of the claims you have entered. To search for a specific claim, enter search values into any or all of the search fields, and click on the **Search** button.

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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.

+ New Claim

RRE ID: 145688

RRE Name: Dynamics Inc

Transactions Remaining: **101**

Latest DCN	Trn Cnt	Policy Number	Claim Number	Medicare ID	Beneficiary Name	CMS Date of Injury	Initial Entry Date	Last Action	Status	Disposition	Actions
Latest DCN	Trn Cnt	Policy Numbe	Claim Numbe	Medicare ID Filtr	Beneficiary Nam	CMS Date of	Initial Entry D	Last Action	Status Filter	Disposition Filter	
10580	1	pn1111	15678000	D1690519212	WANDA CARR	01/01/2011	01/26/2021	Update	Saved Not Submitted		History Delete
10575	9	12345678	15678054	519212	MARY WISE	01/01/2010	12/28/2020	Update	Completed		History Delete
10576	9	914567	15678012	919212	BEN RODGERS	01/01/2010	12/28/2020	Update	Deleted		History
10581	1	5678ABC	15678001	018340998A	FRANK JOBS	01/01/2011	12/28/2020	Update	New		History Delete
10577	9	123456C	15678003	719212	LEWIS CANNON	01/01/2010	12/28/2020	Update	In Process		History Delete

5 rows total.

**Slide notes**

To submit the required delete, go to the Claim Listing page and click the Delete Action for the particular claim. When the Delete Confirmation pop-up displays, confirm the delete by clicking Delete.

Click Close to return to the Claim Listing page.

The original claim report will be marked as deleted on the Claim Listing page. When the claim report is deleted, the Transactions Remaining count will be decreased by one.

**Slide 49 of 54 - Claim Listing**

Claim Listing

August 6, 2024 at 1:01:35 PM

This page lists all of the claims you have entered. To search for a specific claim, enter search values into any or all of the search fields, and click on the **Search** button.

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.

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.

**+ New Claim** RRE ID: 145688 RRE Name: Dynamics Inc Transactions Remaining: 101

Latest DCN	Trn Cnt	Policy Number	Claim Number	Medicare ID	Beneficiary Name	CMS Date of Injury	Initial Entry Date	Last Action	Status	Disposition	Actions
10580	1	pn1111	15678000	D1690519212	WANDA CARR	01/01/2011	01/26/2021	Update	Saved Not Submitted		History Delete
10575	9	12345678	15678054	519212	MARY WISE	01/01/2010	12/28/2020	Update	Completed		History Delete
10576	9	914567	15678012	919212	BEN RODGERS	01/01/2010	12/28/2020	Update	Deleted		History
10581	1	5678ABC	15678001	018340998A	FRANK JOBS	01/01/2011	12/28/2020	Update	New		History Delete
10577	9	123456C	15678003	719212	LEWIS CANNON	01/01/2010	12/28/2020	Update	In Process		History Delete

5 rows total.

**Slide notes**

When the Claim Listing page appears, click New Claim to add the new claim report with the corrected CMS Date of Incident.

When entering the data for the New Claim, enter the most current information you have for the Injured Party’s Name, Date of Birth, and Gender along with all other required data elements including the new CMS Date of Incident.

When the New Claim is entered, the Transactions Remaining count will be decreased by one.

Each claim report will be processed with the applicable Disposition Code. The original claim report will be marked as deleted on the Claim Listing page and the new claim report will be added with the corrected CMS Date of Incident.

**Slide 50 of 54 - Claim Report Added in Error - Example**

## Claim Report Added in Error - Example

- Claim report with no ORM was accepted with a 02 Disposition Code
  - RRE discovers that the claim is not settled
  - RRE must delete the previously accepted claim report

**Slide notes**

Let's say a claim report was submitted for a settled liability claim with no ORM and was accepted with a 02 Disposition Code (i.e., claim accepted, no ORM).

Subsequently, the RRE discovers that there is no settlement, judgment, award, or other payment with respect to the claim. Therefore, there is no TPOC, and the claim is not yet reportable.

The RRE must delete the previously accepted claim report.

**Slide 51 of 54 - Claim Listing - Delete**

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August 6, 2024 at 1:01:35 PM

## Claim Listing

This page lists all of the claims you have entered. To search for a specific claim, enter search values into any or all of the search fields, and click on the **Search** button.

---

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.

+ New Claim

RRE ID: 145688

RRE Name: Dynamics Inc

Transactions Remaining: **101**

Latest DCN	Trn Cnt	Policy Number	Claim Number	Medicare ID	Beneficiary Name	CMS Date of Injury	Initial Entry Date	Last Action	Status	Disposition	Actions
Latest DCN	Trn Cnt	Policy Numbe	Claim Numbe	Medicare ID Filtr	Beneficiary Nam	CMS Date of	Initial Entry D	Last Action	Status Filter	Disposition Filter	
10580	1	pn1111	15678000	D1690519212	WANDA CARR	01/01/2011	01/26/2021	Update	Saved Not Submitted		History <a href="#">Delete</a>
10575	9	12345678	15678054	519212	MARY WISE	01/01/2010	12/28/2020	Update	Completed		History <a href="#">Delete</a>
10576	9	914567	15678012	919212	BEN RODGERS	01/01/2010	12/28/2020	Update	Deleted		History
10581	1	5678ABC	15678001	018340998A	FRANK JOBS	01/01/2011	12/28/2020	Update	New		History <a href="#">Delete</a>
10577	9	123456C	15678003	719212	LEWIS CANNON	01/01/2010	12/28/2020	Update	In Process		History <a href="#">Delete</a>

5 rows total.

**Slide notes**

To submit the required delete, go to the Claim Listing page and click the Delete Action for the particular claim. When the Delete Confirmation pop-up displays, confirm the delete by clicking Delete. Click Close to return to the Claim Listing page.

The original claim report will be marked as deleted on the Claim Listing page. When the claim report is deleted, the Transactions Remaining count will be decreased by one.

**Slide 52 of 54 - Course Summary**

## Course Summary

- Claim Listing
- When and how to
  - Resume claim submission
  - Submit updates
  - Submit deletes

**Slide notes**

This module began with an overview of the Claim Listing page. It explained when and how to resume the DDE claim submission process and clarified when and how to submit updates and deletes to DDE claim reports.

**Slide 53 of 54 - Conclusion**



You have completed the DDE Resume, Update, and Delete Claim Reports course. Detailed information on the DDE option can be found in the Section 111 COBSW User Guide available for download after login at:  
<https://www.cms.gov/medicare/coordination-benefits-recovery/mandatory-insurer-reporting>.

**Slide notes**

You have completed the DDE Resume, Update, and Delete Claim Reports course. Detailed information on the DDE option can be found in the Section 111 COBSW User Guide available for download after login at the following link: [CMS NGHP Website](#).

**Slide 54 of 54 - 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, in white, 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](#).