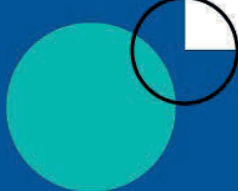




## Switching To or From DDE

### Slide 1 of 25 - Switching To or From DDE



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

## Switching To or From DDE

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 Switching To or From Direct Data Entry (DDE) course.

**Slide 2 of 25 - 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 at the following link:

<https://www.cms.gov/medicare/coordination-benefits-recovery/mandatory-insurer-reporting>.

**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: [CMS NGHP Website](https://www.cms.gov/medicare/coordination-benefits-recovery/mandatory-insurer-reporting).

**Slide 3 of 25 - Course Overview**

## Course Overview

- Switching to DDE from a File Submission Method
- Switching from DDE to a File Submission Method

\* Direct Data Entry is only available for NGHPs at this time

**Slide notes**

This course explains the process a Non-Group Health Plan (NGHP) Responsible Reporting Entity (RRE) must follow when switching to Direct Data Entry (DDE) from a file submission method, explains how an NGHP RRE can switch to a file submission method from DDE, and includes general information regarding these methods.

This course is intended for NGHP RREs that have already completed the registration and account setup processes. Direct Data Entry is only available for NGHPs at this time.

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 25 - 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 on the COBSW S111/MRA 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. .

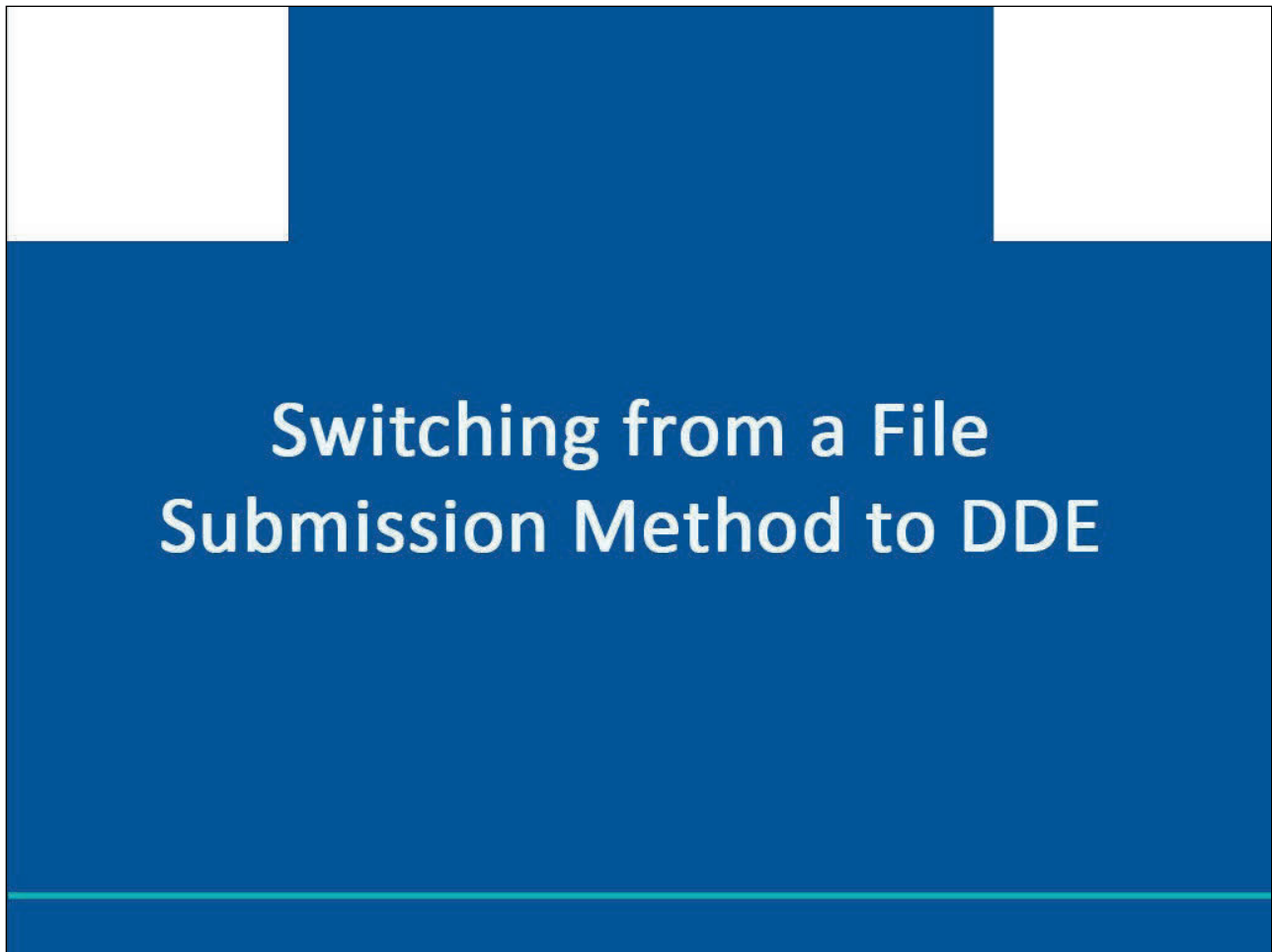
**Slide notes**

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 on the COBSW S111/MRA 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 25 - Switching from a File Submission Method to DDE**



**Slide notes**

This part of the course explains the process an NGHP RRE will follow to change their reporting method from a file submission method to DDE.

**Slide 6 of 25 - Direct Data Entry**

The slide features a white background with two blue rectangular accents in the top-left and top-right corners. The title "Direct Data Entry" is centered at the top in a large, black, sans-serif font. Below the title, a bulleted list contains one item: "NGHP RRE must be a Small Reporter". This item is followed by a blue rectangular box with a thin white border containing the text "Intends to submit 500 or fewer claim reports per year" in white, sans-serif font. A thin teal horizontal line is positioned near the bottom of the slide area.

## Direct Data Entry

- NGHP RRE must be a Small Reporter

Intends to submit 500 or fewer claim reports per year

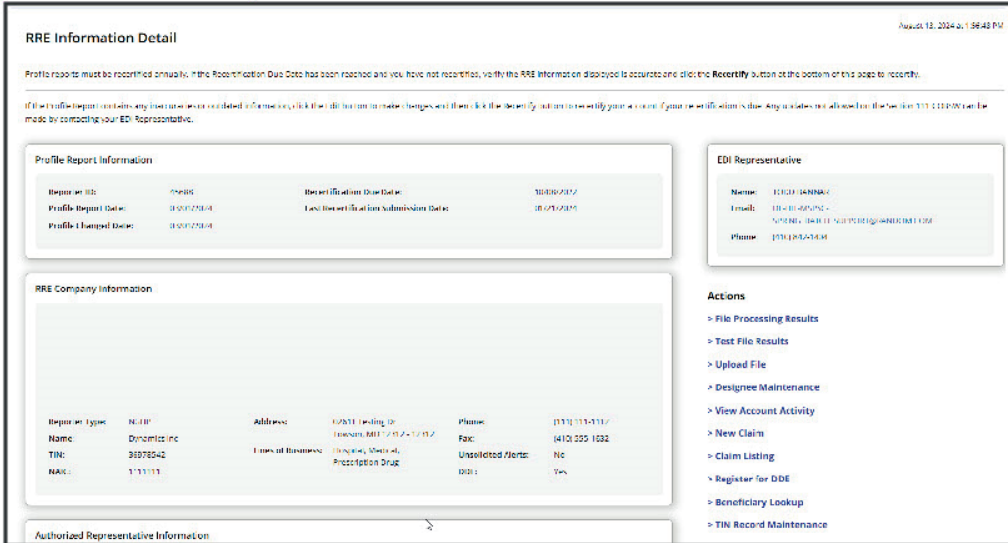
**Slide notes**

To qualify for the DDE method, the NGHP RRE must be a Small Reporter, which is defined as an RRE that intends to submit 500 or fewer claim reports per year.

## Slide 7 of 25 - Switching to DDE

## Switching to DDE

Original Account Setup information:



The screenshot displays the 'RRE Information Detail' page. It includes a 'Profile Report Information' section with fields for Report ID, Profile Report Date, and Profile Change Date. An 'EDI Representative' section lists Name, Email, and Phone. An 'RRE Company Information' section provides details about the company, including Name, TIN, and Address. An 'Actions' sidebar on the right lists various functions like File Processing Results, Test File Results, Upload File, Designee Maintenance, View Account Activity, New Claim, Claim Listing, Register for DDE, Beneficiary Lookup, and TIN Record Maintenance.

- May change to DDE if they now expect to submit fewer than 500 claims annually
- Must contact their EDI Representative to make this change

## Slide notes

RREs that are currently set up with a file transmission method (i.e., Hypertext Transfer Protocol over Secure Socket Layer (HTTPS), Secure File Transfer Protocol (SFTP), or Connect:Direct via CMS EFT) and originally indicated during their Account Setup that they had more than 500 annual expected claims, may change from their current file transmission method to the DDE submission method if they now expect to submit fewer than 500 claim reports on an annual basis. These RREs must contact their EDI Representative for assistance in making this submission change.

**Slide 8 of 25 - Switching to DDE**

## Switching to DDE

RRE currently set up with HTTPS, SFTP, or Connect:Direct via CMS EFT and originally indicated 500 or fewer annual expected claims

- May change to DDE on the Section 111 COBSW without EDI Representative assistance
  - RRE's Account Manager can make this change
- Note: Connect:Direct via CMS EFT submitters are strongly encouraged to contact EDI Representative for assistance
  - EDI Representative will perform cleanup activities

**Slide notes**

RREs that are currently set up with a file transmission method (i.e., HTTPS, SFTP, or Connect:Direct via CMS EFT) and originally indicated during their Account Setup that they had 500 or fewer annual expected claims, may change from their current file submission method to the DDE submission method without EDI Representative assistance.

The RRE's Account Manager can make this change on the Section 111 Coordination of Benefits Secure Website (COBSW) themselves.

Please note: Although RREs currently set up with Connect:Direct via CMS EFT may change to DDE without EDI Representative assistance if they originally indicated during their Account Setup that they had 500 or fewer annual expected claims, these RREs are strongly encouraged to contact their EDI Representative for help with this process. The EDI Representative will be required to perform some cleanup activities for these submitters.



**Slide 9 of 25 - Getting Started**

The screenshot displays the 'Section 111 Mandatory Reporting' page of the COB&R (Coordination of Benefits and Recovery) website. The header includes the COB&R logo, navigation links for 'About', 'CMS Links', and 'How To', and buttons for 'New Registration', 'Account Setup', and 'Show Help Page'. A large blue box with the text 'Getting Started' is prominently displayed. Below this, the 'Welcome to the Section 111 COB Secure Website' section contains a 'Section 111 News & Updates' box with a test message. To the right, the 'Account Sign In' section features input fields for 'Login ID' and 'Password', each with a 'Forgot your [Login ID/Password]?' link, and a 'Sign In' button. A blue callout box states: 'Must login to the Section 111 COBSW at <https://www.imp.cob.cms.hhs.gov/mra/> to make this change'. The bottom of the page features a 'Coordination of Benefits' section with the text 'The registration process requires' and an illustration of people and icons representing various benefits.

**Slide notes**

In order to switch from a file submission method to DDE, the Account Manager for the RRE ID that originally indicated during their Account Setup that they had 500 or fewer annual expected claims should log into the Section 111 COBSW at [Section 111 COBSW](#) to make this change.

## Slide 10 of 25 - Switching to DDE

**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 clicking on the column headers. 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.

• Users can only switch methods for those RREs that they are the associated Account Manager

Switching to DDE

**RRE Listing** Export

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

## Slide notes

After a successful login, the RRE Listing Page will appear. This page lists all of the RRE IDs to which the user is associated. Users can only switch methods for those RREs that they are the associated Account Manager.

Use the RRE ID link to access the RRE from the list to access the Actions available for the selected RRE ID.

**Slide 11 of 25 - Switching to DDE**

The screenshot shows the 'RRE Information Detail' page on the COB&R website. The page header includes the COB&R logo, the title 'Section 111 Mandatory Reporting', and user information 'Mike Brown ()' with a 'Print' button. A navigation bar contains links for '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'. It contains two paragraphs of text explaining the recertification process. Below the text are two side-by-side panels: 'Profile Report Information' and 'EDI Representative'. The 'Profile Report Information' panel displays fields for Reporter ID, Recertification Due Date, Profile Report Date, Last Recertification Date, Submission Date, and Profile Changed Date. The 'EDI Representative' panel displays fields for Name, Email, and Phone number.

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 () Print

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

Information Detail

July 29, 2024 at 1:47:03 PM

### RRE Information Detail

Profile reports must be recertified annually. If the Recertification Due Date has been reached and you have not recertified, verify the RRE information displayed is accurate and click the **Recertify** button at the bottom of this page to recertify.

If the Profile Report contains any inaccuracies or outdated information, click the Edit button to make changes and then click the Recertify button to recertify your account if your recertification is due. Any updates not allowed on the Section 111 COBSW can be made by contacting your EDI Representative.

#### 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-SUP PORT@RANDOM.COM
Phone:	(410) 842-1404

**Slide notes**

The RRE Information Detail page will appear for the selected RRE ID. Use the scroll bar on the far right-hand side of page to scroll down to the Actions links.

## Slide 12 of 25 - 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		

**EDI Representative**

Name: TODD BANNAR  
Email: DL-HIT-MSPSC-SPRING\_BATCH\_SUPPORT@RANDOM.COM  
Phone: (410) 842-1404

**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, select the Register for DDE

Note: RREs that indicated that they expected to submit more than 500 claims on an annual basis during the Account Setup step will receive an error if they select the Register for DDE action.

Since DDE submitters must indicate that they plan to submit 500 or fewer claim reports on an annual basis, these RREs must contact their EDI Representative to proceed with this change.

Note: The S111/MRA application RRE Listing page will be modified to include the "Beneficiary Lookup" as an available action for DDE reporters.

## Slide 13 of 25 - Switching to DDE

August 13, 2024 at 1:56:48 PM

## RRE Information Detail

Profile reports must be recertified annually. If the Recertification Due Date has been reached and you have not recertified, verify the RRE information displayed is accurate and click the **Recertify** button at the bottom of this page to recertify.

If the Profile Report contains any inaccuracies or outdated information, click the Edit button to make changes and then click the Recertify button to recertify your account if your recertification is due. Any updates not allowed on the Section 111 COBSW can be made by contacting your EDI Representative.

Profile Report Information

Switching to DDE

EDI Representative

Report  
Profile  
Date:  
Profile  
Date:

**Register Reporter for Direct Data Entry (DDE)** [Show Help Page](#)

Direct Data Entry (DDE) enables you to directly enter, review, and monitor your claim information using the COB Secure Website. It is designed to reduce the cost of submitting claims for reporters that submit 500 or fewer claims annually. If you register for DDE you will not be able to submit claims via file; however, you may continue to monitor the status of files you submitted previously.

Would you like to register for DDE now?

Yes

No

RRE Comp

- Once Yes is clicked, RRE profile is updated
  - RRE will be unable to submit files

Reporter NGHP Address: 02611 Testing Phone: (111) 111-

[> Upload File](#)  
[> Designee Maintenance](#)

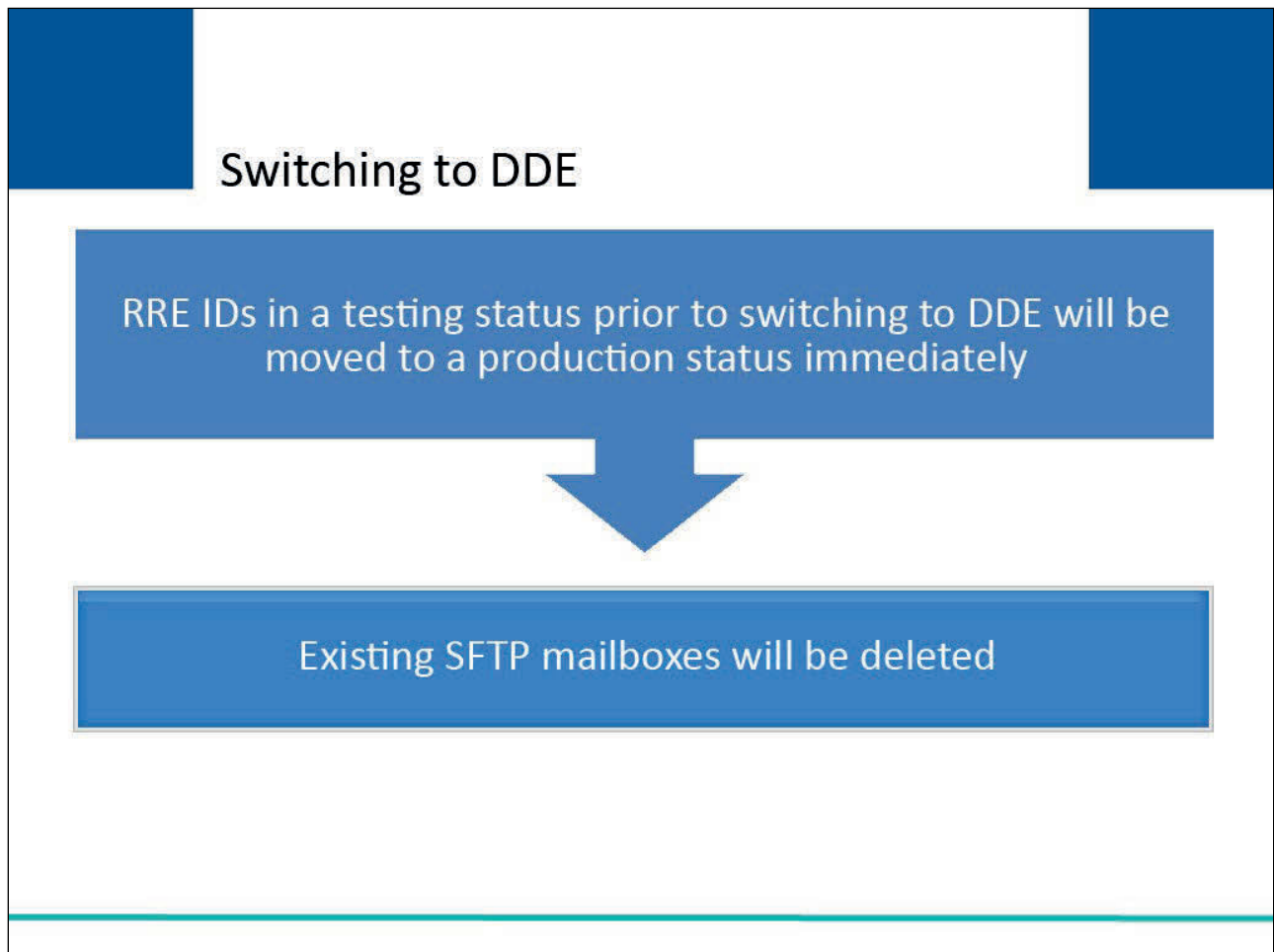
Slide notes

The system will display the Register Reporter for Direct Data Entry (DDE) pop-up box. The Account Manager must click yes to confirm that they wish to change from a file submission method to DDE.

Once Yes is clicked, the system will update the RRE profile to DDE and return the Account Manager to the RRE Listing page.

These RRE IDs will no longer be able to submit any Claim Input Files. If they attempt to, the Account Manager will receive an email indicating the file has failed with a severe error.

Page 13 of 25

**Slide 14 of 25 - Switching to DDE****Slide notes**

RRE IDs in a testing status prior to switching to DDE will be moved to a production status immediately since testing is not required for DDE.

Any existing SFTP mailboxes previously established for the RRE ID will not be deleted immediately, as they may contain submitted files in process or response files to be downloaded.

However, these mailboxes will eventually be deleted as appropriate, at a later date, by the Benefits Coordination & Recovery Center (BCRC).

**Slide 15 of 25 - Switching to DDE - Previously Submitted Files**

## Switching to DDE Previously Submitted Files

- RREs that change to DDE from a file submission
  - Will not see any claim reports previously reported via a file submission on the DDE Claim Listing screens
  - Can continue to view file processing results for their previously submitted test and production files using Test File Results and File Processing Results actions

**Slide notes**

When an RRE has changed their submission method from a file-related process to DDE, any claim reports previously reported via a file submission method will not be listed on the DDE Claim Listing screens.

RREs can continue to view file processing results for their previously submitted test and production files using the Test File Results and File Processing Results actions on the RRE Listing page.

Note: DDE RREs accessing certain pages in the COBSW Section 111 will not see the “Transaction Remaining” field as the lookup is not limited for those RREs.



**Slide 16 of 25 - Switching to DDE - Updating Records Accepted via File Submission**

## Switching to DDE - Updating Records Accepted via File Submission

- To view, update and/or delete a claim report previously submitted and accepted via file submission on a DDE Claim Listing screen
  - RRE must resubmit the record as a New Claim using DDE
    - Key data fields must match key data fields on previously accepted file submission claim report
  - System will treat the newly added claim report as an update
  - New DDE claim report will be visible on DDE screens
  - RRE can maintain the claim report using DDE
  - Any resubmission of claim information will count towards your annual 500 claim transaction limit

**Slide notes**

In order for an RRE to view, update, and/or delete a claim report previously submitted and accepted via a file submission method on a DDE Claim listing screen, the RRE will have to resubmit the claim report as a New Claim using DDE.

When the claim report is resubmitted, the key data fields must match the key data fields on the previously accepted file submission claim report.

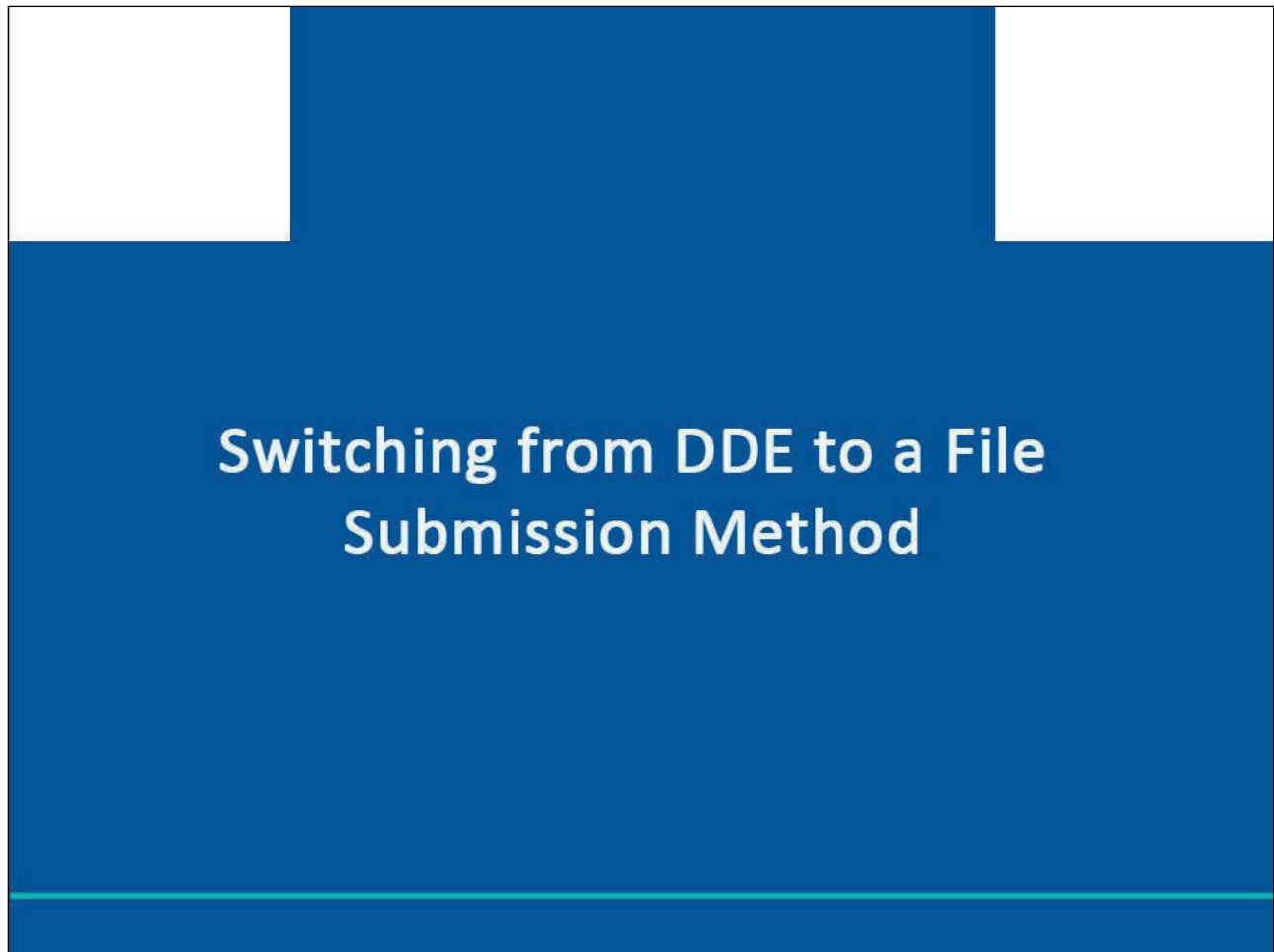
The system will treat the newly added DDE claim report as an Update Record to the claim report previously submitted in the file submission.

The new DDE claim report will then be visible on the DDE screens and the RRE will be able to maintain the claim report using DDE.

Please remember, any resubmission of claim information will count towards your annual 500 claim transaction limit.



**Slide 17 of 25 - Switching from DDE to a File Submission Method**



**Slide notes**

This part of the course explains the process a NGHP RRE will follow to change their reporting method from DDE to a file submission method.

**Slide 18 of 25 - Switching to File Submission from DDE**

## Switching to File Submission from DDE

- RREs that chose DDE and later determine they should be using a file submission method must contact their EDI Representative



### Slide notes

RREs that are currently setup with DDE and later determine that they should be using a file submission method must contact their EDI Representative to make this switch.

**Slide 19 of 25 - Switching to File Submission from DDE Status**

## Switching to File Submission from DDE Status

- Once the EDI Representative converts the RRE ID, the RRE ID will be reset to their prior status
  - Status relates to where the RRE ID is in the Account Setup process (Test or Production)
- RREs that never had a file submission status will be placed in test status because they initially registered as DDE
- RREs that originally selected file submission will be reset to their prior status
  - Example: RRE that was in Test status before switching to DDE will be placed back into Test status

**Slide notes**

Once the EDI Representative converts the RRE ID, the RRE ID will be reset to their prior status. The status of the RRE ID relates to where the RRE ID is in the Account Setup process.

An RRE ID can be in a “Test” or “Production” status. RREs that never had a file submission status will be automatically placed in a Test status because they initially registered as DDE.

RREs that had originally selected a file submission method prior to converting to DDE will be reset to their prior status under the file submission method.

For example, an RRE that was in a Test status when they were setup for a file submission method will be placed back into a Test status since testing is required for file submission methods.

**Slide 20 of 25 - Switching to File Submission from DDE**

## Switching to File Submission from DDE Submission Period

- Newly registered RREs that chose DDE and later switch to a file submission method will be assigned a new submission period
- RREs that switch from a file submission to DDE and switch back to a file submission
  - Assigned same period as when the RRE was converted back to file submission
  - Example: RRE converts to a file submission on January 10<sup>th</sup> is assigned a submission period of Group 2

Dates	1st Month	2nd Month	3rd Month
01 - 07	Group 1	Group 5	Group 9
08 - 14	Group 2	Group 6	Group 10
15 - 21	Group 3	Group 7	Group 11
22 - 28	Group 4	Group 8	Group 12

**Slide notes**

Newly registered RREs that chose DDE as their original data submission method and later switch to a file submission method will be assigned a new submission period.

RREs that switch from a file submission to DDE and switch back to a file submission will be assigned the same period as when the RRE was converted back to file submission.

For example, an RRE converting to a file submission on January 10<sup>th</sup>, will be assigned to that submission period which is Group 2.

**Slide 21 of 25 - Switching to File Submission from DDE**

## Switching to File Submission from DDE Submission Period

- Once a file submission period is set
  - Quarterly reporting will commence the following quarter per the requirements in the NGHP User Guide Technical Information Chapter

**Slide notes**

Once a file submission period is set for an RRE ID, quarterly reporting will commence the following quarter per the requirements set forth in the NGHP User Guide Technical Information Chapter.

**Slide 22 of 25 - Switching to File Submission from DDE**

## Switching to File Submission from DDE Maintaining Records Accepted via DDE

- RREs will have to maintain their previously accepted DDE claim reports using their file submission
  - Submit any changes as an Update or Delete Record on RREs file submission
- RRE cannot use DDE to maintain any claim reports previously reported under DDE after switching to file submission
- RRE can only use one method to submit claim information
- RRE IDs that switch to a file submission method will no longer have access to DDE

**Slide notes**

RREs that convert from the DDE submission method to a file submission method will have to maintain their previously accepted DDE claim reports outside of the Section 111 COBSW.

Any changes to these DDE claim reports must be submitted using an Update or Delete Record on the RREs file submission.

Once an RRE has switched from DDE to a file submission method, the RRE cannot use DDE to maintain any claim reports previously reported under DDE. RREs can only use one method to submit claim information.

If an RRE ID switches to a file submission method, DDE will no longer be accessible for that RRE ID.

**Slide 23 of 25 - Course Summary**

## Course Summary

- Switching to DDE from a File Submission Method
- Switching from DDE to a File Submission Method



\* Direct Data Entry is only available for NGHPs at this time



### Slide notes

This course explained the process a Non-Group Health Plan (NGHP) Responsible Reporting Entity (RRE) must follow when switching to Direct Data Entry (DDE) from a file submission method, explained how an NGHP RRE can switch to a file submission method from DDE, and included general information regarding these methods.

**Slide 24 of 25 - Conclusion**





You have completed the Switching To or From Direct Data Entry (DDE) 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.imp.cob.cms.hhs.gov/mra/>.

**Slide notes**

You have completed the Switching To or From Direct Data Entry (DDE) 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: [Section 111 COBSW](#).



**Slide 25 of 25 - NGHP Training Survey**



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

**Slide notes**

If you have any questions or feedback on this material, please go the following URL: [NGHP Training Survey](#).