Switching To or From DDE

Slide 1 of 25 - Switching To or From DDE

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.

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. .
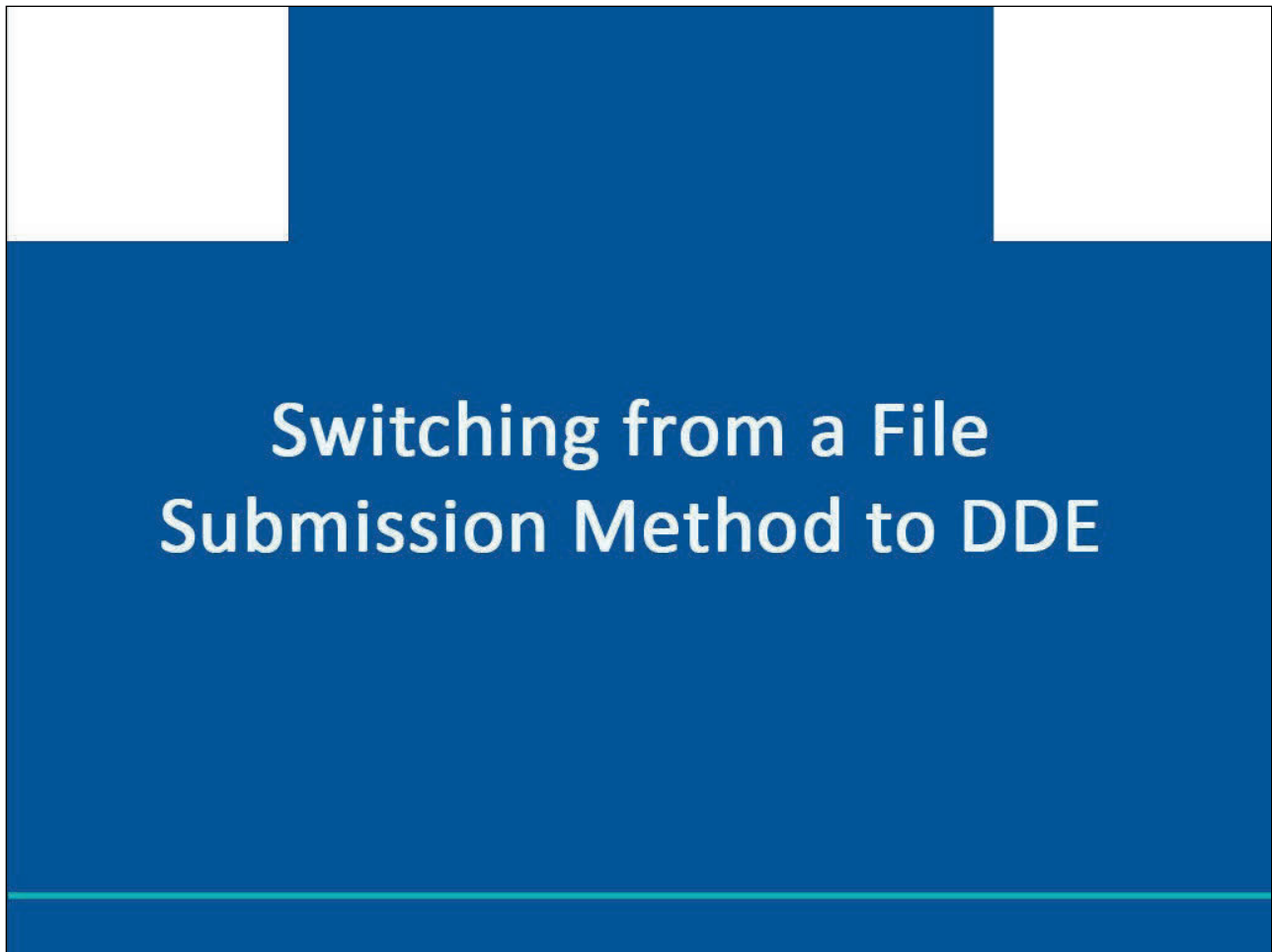
Slide notes

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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.

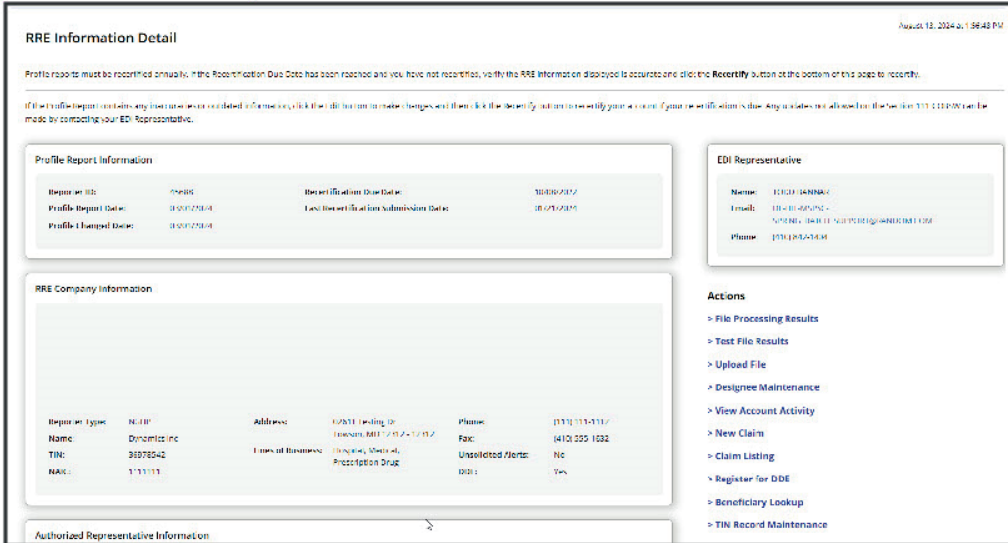**Slide 6 of 25 - Direct Data Entry**

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

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

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

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

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

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

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.

Slide 14 of 25 - Switching to DDE
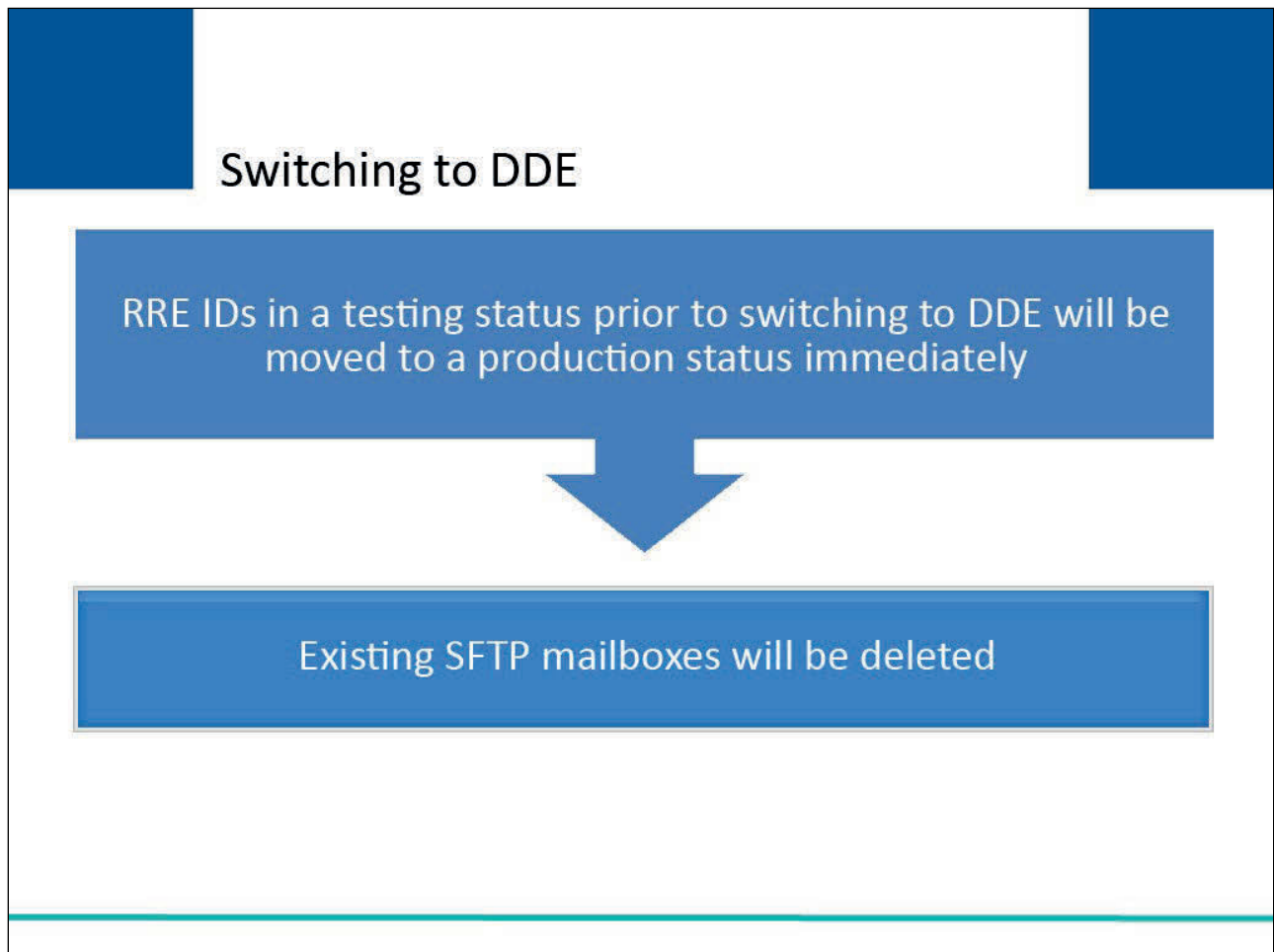
Slide notes

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
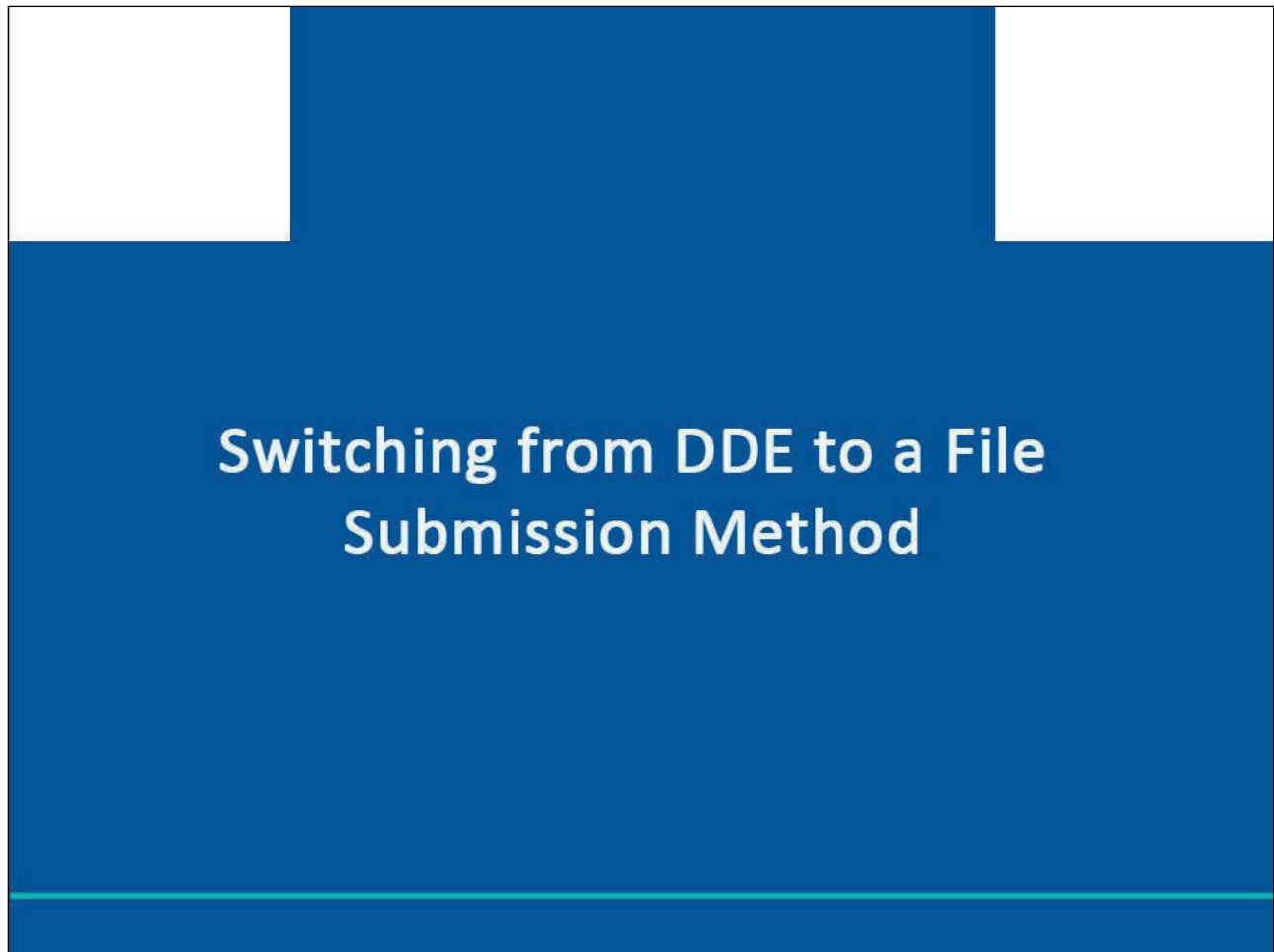
Slide notes

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

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 10th 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 10th, 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

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

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

Slide notes

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