State & Local Government Solutions

Medicaid Information Technology System (MITS)

MMA Reporting/Medicare Buy-In Participant Guide

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Ohio | Medicaid Information Technology System

Course Overview

In the first part of this course, you will gain an understanding of how to access the MMA Reports. You will learn how to view and print the MMA reports so that you can identify exceptions and file errors. You will also learn how to view and print the annual CMS 372 reports.

In the second part of this course, you will learn how to search for, add, update, and delete Medicare-related segments for a recipient.

In the final part of this course, you will learn about Medicare Buy-In maintenance. You will learn how to search for and update Medicare A and B Buy-In mismatch records; how to search for a Coordination of Benefits Agreement (COBA) eligibility response record; and how to search for, add, update, and delete these record types:

- Part C Group Health Organization (GHO) contracts
- Part D Low Income Subsidy (LIS) entries
- Medicare aid category cross-references
- Medicare Part D Prescription Drug Program (PDP) carriers

Objectives

After completing this course, you should be able to:

- View and print Medicare Modernization Act (MMA) reports
- View and print the annual CMS 372 reports
- Create, search for, update, and delete these segment records:
  - Medicare A Coverage
  - Medicare B Coverage
  - Medicare Buy-In A Combined
  - Medicare Buy-In B Combined
  - Medicare ID
- Create, search for, update, and delete these records:
  - Medicare aid category cross-reference
  - Part C Group Health Organization (GHO) contracts
  - Part D Low Income Subsidy (LIS) entry
- Search for and update Medicare A or B Buy-In Mismatch records
- Search for these records:
  - Medicare A or B 1167 Mismatch
  - Coordination of Benefits Agreement (COBA) Eligibility Response
- Create, search for, and update a Part D PDP Carrier record

Agenda

Topic	Time
DAY 1	
Welcome and Introductions	15 minutes
Course Overview	15 minutes
Accessing MMA Reports	30 minutes
Accessing the Annual CMS 372 Reports	30 minutes
Break	15 minutes
Maintaining Medicare Part A or B Coverage Segments	120 minutes
Lunch	60 minutes
Maintaining Medicare Part A or B Coverage Segments, continued	30 minutes
Maintaining Medicare Buy-In A and B Combined Coverage Segments	90 minutes

Topic	Time
Break	15 minutes
Maintaining Medicare Buy-In A and B Combined Coverage Segments, continued	30 minutes
Maintaining Medicare ID Segments	90 minutes
DAY 2	
Maintaining Medicare Aid Category Cross-reference Records	120 minutes
Break	15 minutes
Maintaining Medicare Aid Category Cross-reference Records, continued	30 minutes
Maintaining Part C GHO Contracts Records	75 minutes
Lunch	60 minutes
Maintaining Part C GHO Contracts Records, continued	45 minutes
Maintaining Part D LIS Entry Records	90 minutes
Break	15 minutes
Searching for and Updating a Medicare A or B Buy-In Mismatch Record	75 minutes
Searching for Medicare A or B 1167 Mismatch Records	15 minutes
DAY 3	
Searching for Medicare A or B 1167 Mismatch Records, continued	30 minutes
Searching for COBA Eligibility Response Records	45 minutes
Maintaining Part D PDP Carrier Records	45 minutes
Break	15 minutes
Maintaining Part D PDP Carrier Records, continued	45 minutes
Total	2 days, 3 hrs

Accessing MMA Reports

What

In this topic you learn how to search for, view, and print the MMA reports.

Definitions

MMA: Medicare Modernization Act.

EDMS: Electronic Data Management System

COLD: Computer Output to Laser Disc

Background

Each day, the Centers for Medicare and Medicaid Services (CMS) electronically send a file of recipient information to the Early Adopter System, a contractor for the State of Ohio. The Early Adopter System processes this file and returns it to CMS along with a copy to the Medicaid Information Technology System (MITS), also sent electronically. MITS then generates the MMA reports that you can view to identify missing information, errors, and exceptions in recipient information.

Examples of errors:

- Incorrect Social Security Number
- Incorrect Medicare number

Examples of exceptions:

- CMS has a recipient that is now eligible to buy into Medicare but MITS does not have a record of that recipient.
- Medicare A and B coverage span dates do not agree between the CMS file and MITS.
- Medicare ID numbers do not match between the CMS file and MITS.

Who

An OHP staff member responsible for using the MMA reports to identify missing information, errors, and exceptions performs this task.

When

You perform this task when you receive one of these forms alerting you about any exceptions or errors:

Form	Indicates
JFS 07102	Changes in Medical Assistance Health Care Coverage Dates Buy-In Eligibility.
JFS 06653	Medical Claim Review Request.
JFS 07081	You need to access the Early Adopter System to check Medicare Buy-In transactions such as research, audit, and eligibility inquiries.

Relevance

Your ability to perform this task enables you to identify missing information, errors, or exceptions in the MMA file. By correcting these errors in MITS you help Ohio Health Plans comply with CMS and governmental requirements to maintain accurate Medicare recipient data.

If this task is not performed correctly, Medicare claims are denied when CMS determines there is a mismatch between their information and the MMA file.

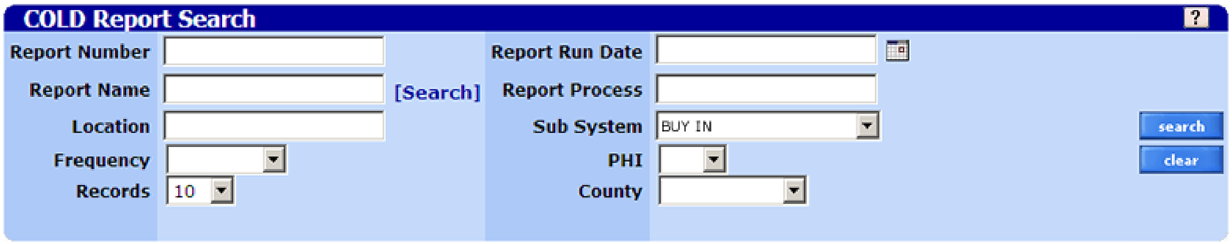
How To

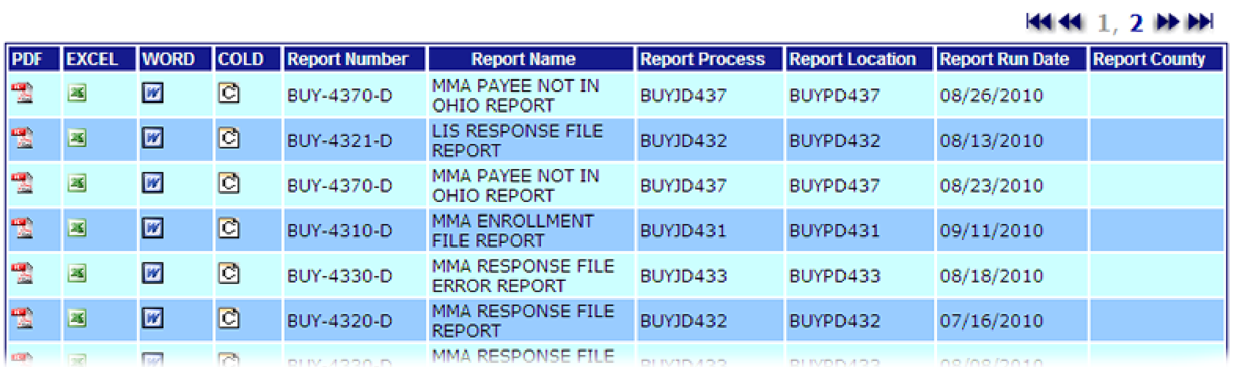
Follow these steps from the MITS landing page to access MMA reports:

Step	Action
1	Click **COLD Report Search.**
2	Select **BUY IN** from the **Sub System** drop-down list, then click **search.** **Tip:** You can narrow your results by entering search criteria in the other available fields. You can use the percent sign (%) as a wildcard character.
3	Locate the MMA report you want to view. **Tip:** You may need to navigate to locate the desired report. You can also sort the columns by clicking the column headings.
4	Click a button from one of the first four columns to select the desired format and view the report. **Note**: MITS opens the report in the software corresponding to your selection, which **must** be installed on your workstation.
5	To print the report, click the appropriate button or icon for the software in which you are viewing the report.

Success

You have successfully completed a search for MMA reports when your COLD Report Search panel looks similar to the one shown here:




1, 2

PDF	EXCEL	WORD	COLD	Report Number	Report Name	Report Process	Report Location	Report Run Date	Report County
				BUY-4370-D	MMA PAYEE NOT IN OHIO REPORT	BUYJD437	BUYPD437	08/26/2010	
				BUY-4321-D	LIS RESPONSE FILE REPORT	BUYJD432	BUYPD432	08/13/2010	
				BUY-4370-D	MMA PAYEE NOT IN OHIO REPORT	BUYJD437	BUYPD437	08/23/2010	
				BUY-4310-D	MMA ENROLLMENT FILE REPORT	BUYJD431	BUYPD431	09/11/2010	
				BUY-4330-D	MMA RESPONSE FILE ERROR REPORT	BUYJD433	BUYPD433	08/18/2010	
				BUY-4320-D	MMA RESPONSE FILE REPORT	BUYJD432	BUYPD432	07/16/2010	
				[illegible]	MMA RESPONSE FILE	[illegible]	[illegible]	[illegible]	

Next Steps

After you complete this task, you should immediately correct any errors.

Summary

In this topic you learned how to search for, view, and print the MMA reports.

Accessing the Annual CMS 372 Reports

What

In this topic you learn how to access, view, and print the annual CMS 372 waiver batch reports.

Waiver

Waivers are permissions granted to the State to use Medicaid funds for services where restrictions would normally apply.

MITS automatically generates these reports, which list the Medicaid cost data, each with a defined reporting period. The eight reports are:

- MAR-4830-A: ODA Passport HCBS Waiver
- MAR-4835-A: Transitions Carve-Out HCBS Waiver
- MAR-4840-A: Transitions HCBS Waiver
- MAR-4800-A: Assisted Living HCBS Waiver
- MAR-4810-A: HomeCare HCBS Waiver
- MAR-4815-A: MR-DD Individual Option HCBS Waiver
- MAR-4820-A: MRDD Level 1 HCBS Waiver
- MAR-4825-A: ODA Choices HCBS Waiver

You need to obtain specific numbers from these reports and then submit them to CMS via their Web site.

Who

An OHP staff member responsible for viewing and printing the annual CMS 372 reports performs this task.

When

You should perform this task when you know that a report for which you are responsible is due.

Relevance

If this task is not performed correctly, the State is unable to send the correct information to CMS.

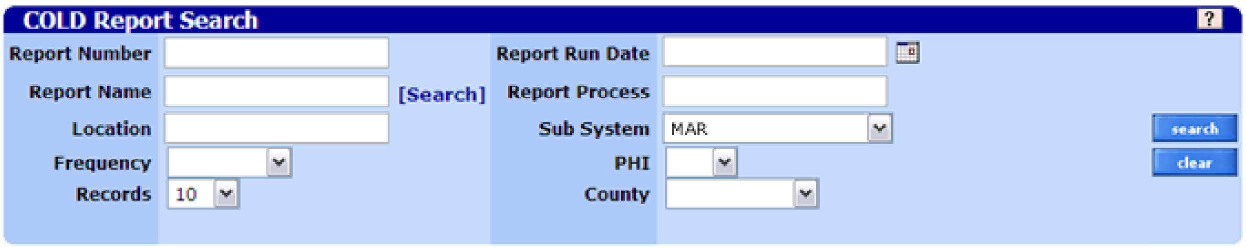
How To

Follow these steps from the MITS landing page to access the CMS 372 reports:

Step	Action
1	Click **COLD Report Search.**
2	Select **MAR** from the **Sub System** drop-down list, then click **search.** **Tip:** You can narrow your results by entering search criteria in the other available fields. You can use the percent sign (%) as a wildcard character.
3	Locate the CMS 372 report you want to view. **Tip:** You may need to navigate to locate the desired report. You can also sort the columns by clicking the column headings.
4	Click a button from one of the first four columns to select the desired format and view the report. **Note**: MITS opens the report in the software corresponding to your selection, which **must** be installed on your workstation.
5	To print the report, click the appropriate button or icon for the software in which you are viewing the report.

Success

You have successfully completed a search for the annual CMS 372 waiver batch reports when your COLD Report Search panel looks similar to the one shown here:



PDF	EXCEL	WORD	COLD	Report Number	Report Name	Report Process	Report Location	Report Run Date	Report County
				MAR-4835-A	CMS 372 ANNUAL REPORT ON HCBS TRANSITIONS AGING CARVE-OUT WAI	MARJA467	MR372RPT	07/21/2010	
				MAR-4840-A	CMS 372 ANNUAL REPORT ON HCBS TRANSITIONS MRDD WAIVER	MARJA468	MR372RPT	07/21/2010	
				MAR-4810-A	CMS 372 ANNUAL REPORT ON HCBS HOME CARE WAIVER	MARJA462	MR372RPT	07/21/2010	
				MAR-4825-A	CMS 372 ANNUAL REPORT ON HCBS CHOICES WAIVER	MARJA465	MR372RPT	07/20/2010	
				MAR-4830-A	CMS 372 ANNUAL REPORT ON HCBS PASSPORT WAIVER	MARJA466	MR372RPT	07/20/2010	
				[illegible]	CMS 372 ANNUAL REPORT ON HCBS	[illegible]	[illegible]	[illegible]	

Next Steps

After you have completed this task, follow local work instructions for submitting information to CMS.

Summary

In this topic you learned how to access, view, and print the annual CMS 372 reports.

Maintaining Medicare Part A or B Coverage Segments

What

In this topic you learn how to create, search for, update, and delete a Medicare Part A or B coverage segment. These tasks are often required when a provider contacts the State inquiring why a claim was **not** paid.

Medicare Coverage Segment

A Medicare coverage segment is a record in MITS that specifies the dates when a recipient is eligible to receive benefits.

At times, MITS denies claims because coverage (represented by a valid segment) does **not** exist. When this happens, you may need to create and retroactively apply a new coverage segment. You must also be able to answer questions about coverage effective dates and make corrections when needed. And when claims should **not** have been paid during the effective dates of a segment, you **must** delete the segment.

Who

A Buy-In Unit staff member performs these tasks.

When

You usually perform these tasks in response to one of the following:

- A request from a provider, the claims unit, or a provider representative
- An alert from the Early Adopter System

Typically you receive these requests via phone calls, emails, or letters, or you become aware of a need to perform these tasks by reviewing the MMA reports. Also when checking your work, you may determine that an error requires correction.

Relevance

Your ability to perform these tasks well has several benefits:

- The recipient can continue to receive needed medical service.
- The provider can get paid for services already rendered.
- You receive fewer complaints and issues to resolve, resulting in a reduced workload.
- You meet your job requirements.

If these tasks are not performed correctly:

- The State of Ohio could lose fiscal funding.
- Valid claims could be denied.
- Claims could be paid incorrectly.
- Your job performance ratings could be negatively affected.

Requirements

Before you attempt these tasks, you should have:

- Information necessary to locate the correct recipient in MITS, such as name and ID, usually provided on the initial contact (phone call, email, report, letter)
- The segment dates
- For new segments only, verification of eligibility (this must be proof such as documentation, a photocopy of the recipient's ID card, and so on – a provider's verbal assurance does **not** constitute proof)

Creating a Medicare Part A or B Coverage Segment

Follow these steps from the MITS home page to create a Medicare Part A or B coverage segment:

Step	Action
1	Click **Recipient**.
2	Click **search**.
3	Type or select the desired search criteria.
4	Click **search**. If you see the **Search Results** panel, click the row for the desired recipient.
5	Click the **Medicare** category link in the **Recipient Maintenance** panel.
6	Click to open the desired **Medicare Coverage** panel (A or B).
7	If coverage segments exist, follow these steps: a. Compare the date of service on the claim to the available segments. b. If the date of service falls within an existing segment: i. Advise the provider to resubmit the claim. ii. Do **not** create a new Medicare Coverage segment. iii. STOP! Do **not** continue with the remaining steps in this procedure. **Tip**: You can research the reason(s) why a claim did not pay during previous submissions by using the Audit History feature (click the **A** icon, then click **Select All**).
8	Click **add**.
9	Type or make selections in all available fields. All fields are required and dates **must** be entered in mm/dd/ccyy format. **Note:** The **Free Indicator** field appears for Medicare A coverage only. **Yes**, the default, indicates there is **no** cost to the State of Ohio.
10	Click **save**.

Searching for and Updating a Medicare Part A or B Coverage Segment

Follow these steps from the MITS home page to search for and update a Medicare Part A or B coverage segment:

Step	Action
1	Click **Recipient**.
2	Click **search**.
3	Type or select the desired search criteria.
4	Click **search**. If you see the **Search Results** panel, click the row for the desired recipient.
5	Click the **Medicare** category link in the **Recipient Maintenance** panel.
6	Click to open the desired **Medicare Coverage** panel (A or B).
7	Click the row of the desired segment.
8	Modify the fields in the **Medicare Coverage** panel as desired. All fields are required and dates **must** be entered in mm/dd/ccyy format.
9	Click **save**.

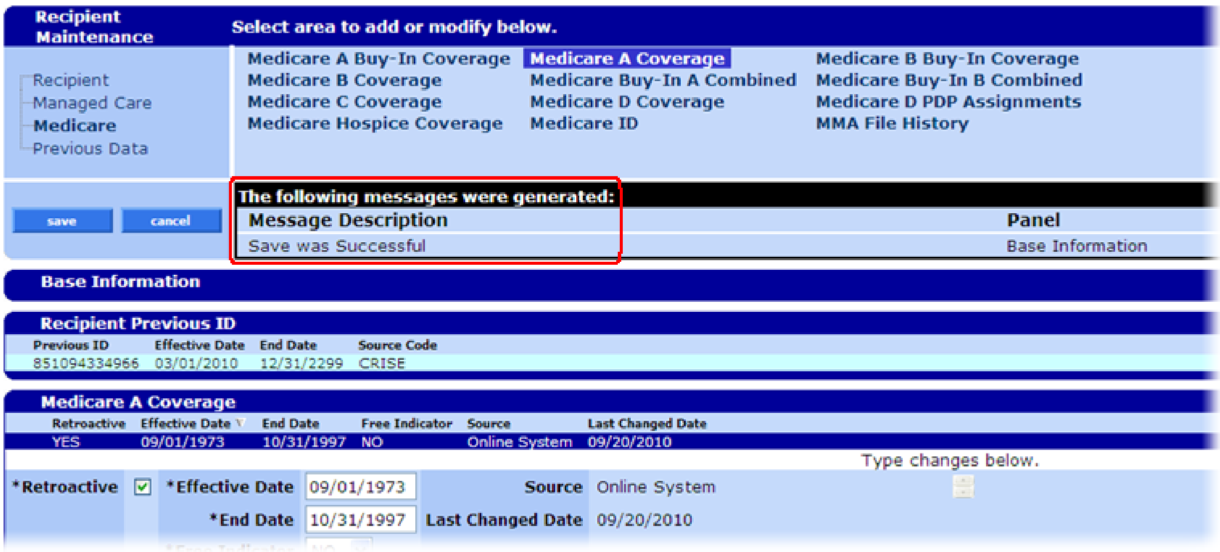
Deleting a Medicare Part A or B Coverage Segment

Follow these steps from the MITS home page to delete a Medicare Part A or B coverage segment:

Step	Action
1	Click **Recipient**.
2	Click **search**.
3	Type or select the desired search criteria.
4	Click **search**. If you see the **Search Results** panel, click the row for the desired recipient.
5	Click the **Medicare** category link in the **Recipient Maintenance** panel.
6	Click to open the desired **Medicare Coverage** panel (A or B).
7	Click the row of the desired segment.
8	Click **delete**.
9	Click **OK** to confirm the deletion.
10	Click **save**.

Success

You have successfully completed these tasks when you see the system message "Save was Successful" as shown here:



Next Steps

You should always close the task by performing any follow-up, agreed-upon communications, such as a return phone call, email reply, and so on.

Practice #1

Using the recipient information provided by your instructor, create a new Medicare Part A coverage segment using this information:

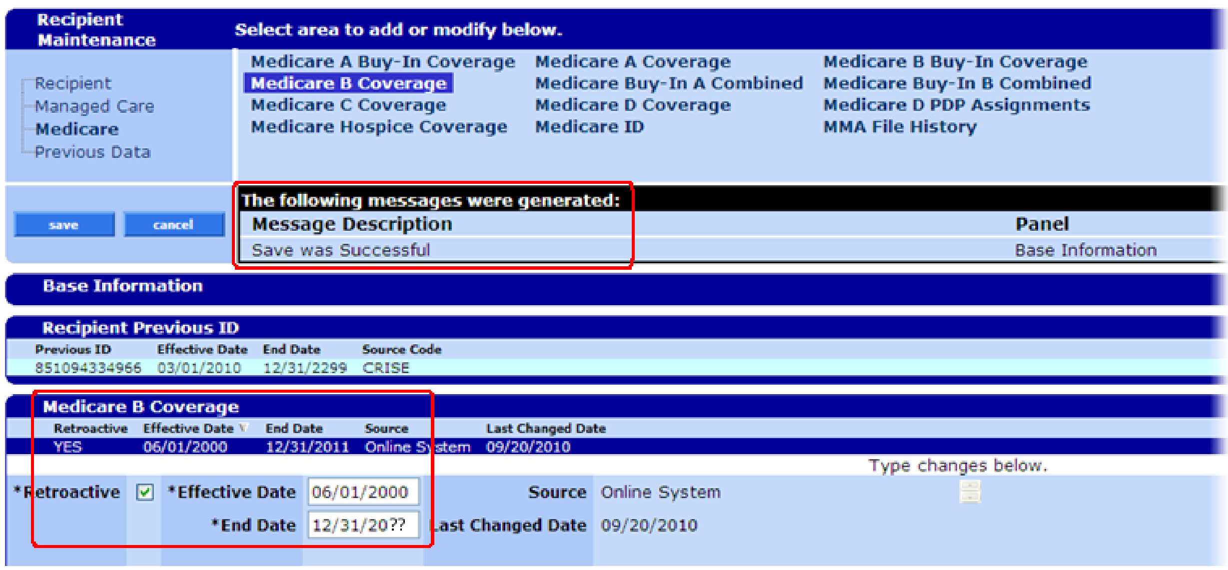
- **Effective Date:** First day of the current month
- **End Date:** Last day of the current year

When you complete this practice, you should see this system message: Save was Successful.

Practice #2

For the same recipient, there is an existing Medicare Part B coverage segment that has expired. Reactivate this segment by changing the end date to the last day of next year.

When you complete this practice, the Medicare B Coverage panel for your recipient should look similar to this example:



Summary

In this topic you learned how to create, search for, update, and delete a Medicare Part A or B coverage segment.

Maintaining Medicare Buy-In A and B Combined Coverage Segments

What

In this topic you learn how to create, search for, update, and delete a Medicare Buy-In A or B Combined coverage segment.

Who

An OHP staff member responsible for accessing and viewing MMA reports from EDMS COLD Report Storage performs these tasks.

When

Typically, you perform these tasks after finding recipients with missing information, errors, or exceptions to their Medicare Buy-In A or B Coverage as shown in the MMA reports. You may also receive a form, phone call, or email indicating there is an exception or an error that needs to be corrected.

Relevance

Your ability to perform these tasks enables Ohio Health Plans to comply with CMS and governmental requirements to maintain accurate Medicare recipient data in MITS. It also ensures that a recipient who is eligible for Medicare A or B Buy-In suffers no money loss resulting from a claim being incorrectly denied.

If this task is not performed correctly, valid Medicare claims are denied when CMS sees a mismatch between their information and the MMA file.

Requirements

Before you attempt these tasks, you should have:

- Information necessary to locate the correct recipient in MITS, such as name, ID, or Social Security Number.
- The appropriate dates and transaction code.

Creating a Medicare Buy-In A or B Combined Coverage Segment

Follow these steps from the MITS home page to create a Medicare Buy-In A or B Combined coverage segment:

Step	Action
1	Click **Recipient**.
2	Click **search**.
3	Type or select the desired search criteria.
4	Click **search**. If you see the **Search Results** panel, click the row for the desired recipient.
5	Click the **Medicare** category link in the **Recipient Maintenance** panel.
6	Click to open the desired **Medicare Buy-In Combined** panel (A or B).
7	Click **add**.
8	Type or make selections in all available fields. **Notes:** Some fields are automatically populated with information from the recipient record. To be sure you have a valid transaction code, use the **Search** link. Obtain the date for the **TXN Date** field from the Buy-In Part A or B form or the MMA report that triggered this task. The end date can be open and dates **must** be entered in mm/dd/ccyy format.
9	Click **save**.

Searching for and Updating a Medicare Buy-In A or B Combined Coverage Segment

Follow these steps from the MITS home page to search for and update a Medicare Buy-In A or B Combined coverage segment:

Step	Action
1	Click **Recipient**.
2	Click **search**.
3	Type or select the desired search criteria.
4	Click **search**. If you see the **Search Results** panel, click the row for the desired recipient.
5	Click the **Medicare** category link in the **Recipient Maintenance** panel.
6	Click to open the desired **Medicare Buy-In Combined** panel (A or B).
7	Click the row of the desired segment.
8	Modify the fields in the **Medicare Buy-In Combined** panel as desired.
9	Click **save**.

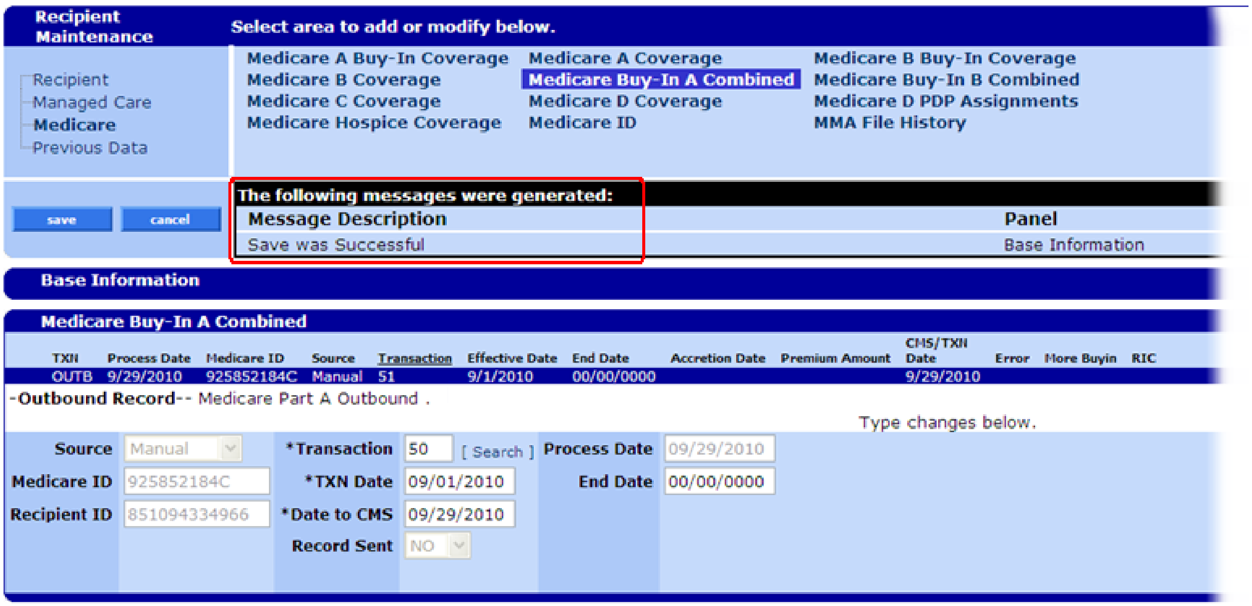
Deleting a Medicare Buy-In A or B Combined Coverage Segment

Follow these steps from the MITS home page to delete a Medicare Buy-In A or B Combined coverage segment:

Step	Action
1	Click **Recipient**.
2	Click **search**.
3	Type or select the desired search criteria.
4	Click **search**. If you see the **Search Results** panel, click the row for the desired recipient.
5	Click the **Medicare** category link in the **Recipient Maintenance** panel.
6	Click to open the desired **Medicare Buy-In Combined** panel (A or B).
7	Click the row of the desired segment.
8	Click **delete**.
9	Click **OK** to confirm the deletion.
10	Click **save**.

Success

You have successfully completed these tasks when you see the system message "Save was Successful" as shown here:



Practice #1

Using the recipient information provided by your instructor, create a new Medicare Buy-In A Combined coverage segment using this information:

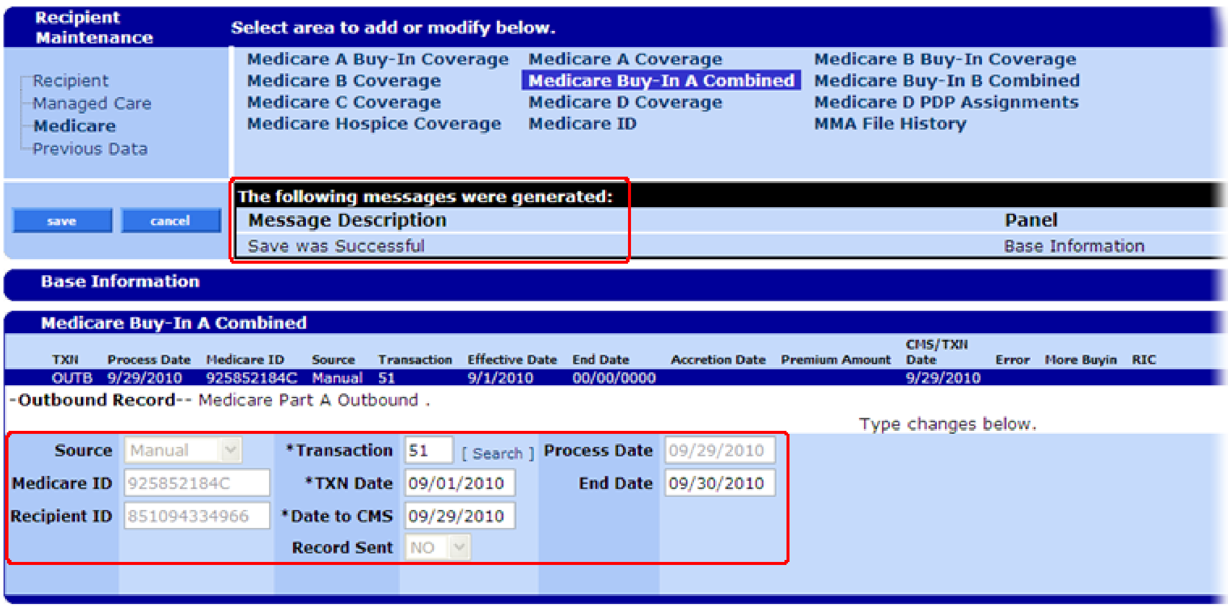
- **Transaction code:** 51
- **Transaction date:** First day of the current month

When you complete this practice, you should see this system message: Save was Successful.

Practice #2

For the same recipient and segment, change the end date to the last day of the current month. Do **not** delete the segment!

When you complete this practice, the Medicare Buy-In A Combined panel for your recipient should look similar to this example:



Summary

In this topic you learned how to create, search for, update, and delete a Medicare Buy-In A or B Combined coverage segment.

Maintaining Medicare ID Segments

What

In this topic you learn how to create, search for, update, and delete a Medicare ID segment.

Medicare ID Segment

A Medicare ID segment is a record in MITS containing the recipient's Medicare ID number and an effective date.

The Medicare ID number is assigned to the recipient by CMS. If a recipient's record in MITS is missing this number, it must be added for billing purposes.

Segments may be created for many reasons, such as disability, death of a spouse, railroad benefits, reaching age, and so on.

The recipient may have more than one ID during his or her lifetime but will never have concurrent active numbers.

Who

A Buy-In Unit staff member performs these tasks.

When

You usually perform these tasks in response to one of the following:

- A request from a provider, the claims unit, or a provider representative
- An alert from the Early Adopter System

Typically you receive these requests via phone calls, emails, or letters, or you become aware of a need to perform these tasks by reviewing the MMA reports. Also when checking your work, you may determine that an error requires correction.

Relevance

Your ability to perform these tasks well has several benefits:

- The recipient can continue to receive needed medical service.
- The provider can get paid for services already rendered.
- You receive fewer complaints and issues to resolve, resulting in a reduced workload.
- You meet your job requirements.

If these tasks are not performed correctly:

- The State of Ohio could lose fiscal funding.
- Valid claims could be denied.
- Claims could be paid incorrectly.
- Your job performance ratings could be negatively affected.

Requirements

Before you attempt these tasks, you should have the information necessary to locate the correct recipient in MITS, such as name or Social Security number, which is usually provided on the initial contact (phone call, email, report, or letter). You must also have the Medicare ID number for the segment.

This information comes from performing research in CRISE, with the Social Security Administration office, by viewing a claim, and so on.

Creating a Medicare ID Segment

Follow these steps from the MITS home page to create a Medicare ID segment:

Step	Action
1	Click **Recipient**.
2	Click **search**.
3	Type or select the desired search criteria.
4	Click **search**. If you see the **Search Results** panel, click the row for the desired recipient.
5	Click the **Medicare** category link in the **Recipient Maintenance** panel.
6	Click **Medicare ID.**
7	Click **add**.
8	Type the Medicare ID number in the corresponding field.
9	Click **save**.

Searching for and Updating a Medicare ID Segment

Follow these steps from the MITS home page to search for and update a Medicare ID segment:

Step	Action
1	Click **Recipient**.
2	Click **search**.
3	Type or select the desired search criteria.
4	Click **search**. <u>If you see the **Search Results** panel</u>, click the row for the desired recipient.
5	Click the **Medicare** category link in the **Recipient Maintenance** panel.
6	Click **Medicare ID.**
7	Click the row of the desired segment.
8	Type the new Medicare ID number or effective date in the corresponding fields.
9	Click **save**.

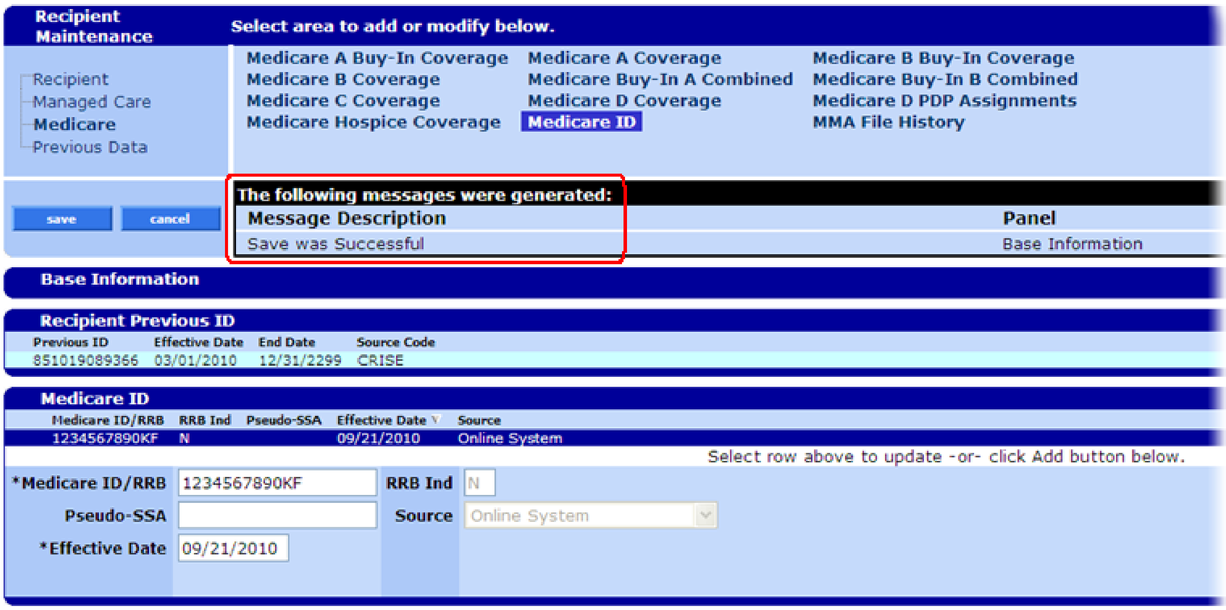
Deleting a Medicare ID Segment

Follow these steps from the MITS home page to delete a Medicare ID segment:

Step	Action
1	Click **Recipient**.
2	Click **search**.
3	Type or select the desired search criteria.
4	Click **search**. If you see the **Search Results** panel, click the row for the desired recipient.
5	Click the **Medicare** category link in the **Recipient Maintenance** panel.
6	Click **Medicare ID.**
7	Click the row of the desired segment.
8	Click **delete**.
9	Click **OK** to confirm the deletion.
10	Click **save**.

Success

You have successfully completed these tasks when you see the system message "Save was Successful" as shown here:



Next Steps

You should always close the task by performing any follow-up, agreed-upon communications, such as a return phone call, email reply, and so on.

Important: You should immediately create a corresponding coverage segment if one does not currently exist.

Practice #1

Using the recipient information provided by your instructor, create a new Medicare ID segment using this information:

> **Medicare ID**: 1020304050 plus your first and last initial (for example, 1020304050KF)

When you complete this practice, you should see this system message: Save was Successful.

Practice #2

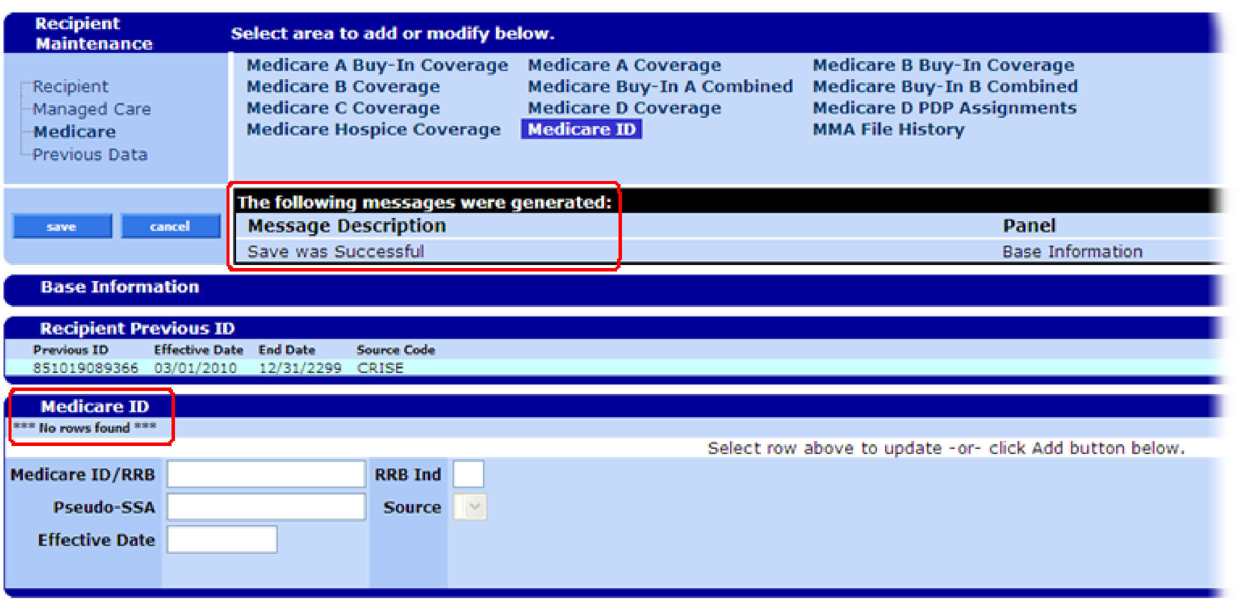
For the same recipient and segment, update the Medicare ID number by moving your initials to the front of the number.

When you complete this practice, you should see this system message: Save was Successful.

Practice #3

Locate another student who has completed the practice session up to this point. Exchange recipient information, and then delete the Medicare ID segment for that recipient.

When you complete this practice, the Medicare ID panel for your exchanged recipient should look similar to this example:



Summary

In this topic you learned how to create, search for, update, and delete a Medicare ID segment.

Maintaining Medicare Aid Category Cross-Reference Records

What

In this topic you learn how to create, search for, update, and delete a Medicare aid category cross-reference record.

This is rarely necessary because these tasks are usually performed by the Early Adopter System, a contractor for the State of Ohio. You should not need to add a record or make updates.

Who

A Buy-In Unit staff member performs these tasks. However, only super users can create new records or make updates.

When

You perform these tasks for technical support purposes only.

Relevance

If you do not make the appropriate additions or changes, the Medicare aid category cross-reference record will **not** be added or updated correctly.

Guidelines

The Medicare Aid Category Cross-Reference panel is used to display and modify the Buy-In Aid category configuration.

Creating a Medicare Aid Category Cross-reference Record

Follow these steps from the MITS home page to create a Medicare aid category cross-reference record:

Step	Action
1	Click **Recipient**.
2	Click **buyin**.
3	Click the **Buy-In Related Data** category in the **Buy-In Maintenance** panel.
4	Click **Medicare Aid Category Cross-Reference**.
5	Click **add**.
6	Type the appropriate information in the fields. All fields are required and are case sensitive.
7	Click **save**.

Searching for and Updating a Medicare Aid Category Cross-reference Record

Follow these steps from the MITS home page to search for and update a Medicare aid category cross-reference record:

Step	Action
1	Click **Recipient**.
2	Click **buyin**.
3	Click the **Buy-In Related Data** category in the **Buy-In Maintenance** panel.
4	Click **Medicare Aid Category Cross-Reference**.
5	Click the row of the record you want to view or update in the **Search Results** panel. **Note:** If there are too many records to find the one you want easily or if the record is from a previous month, search for the desired record in the **Medicare Aid Category Cross-Reference** panel.
6	Super users only: a. Type the new information in the appropriate field(s). b. Click **save**. **Note:** The **Aid Category** and **BIEC** fields **cannot** be changed.

Deleting a Medicare Aid Category Cross-reference Record

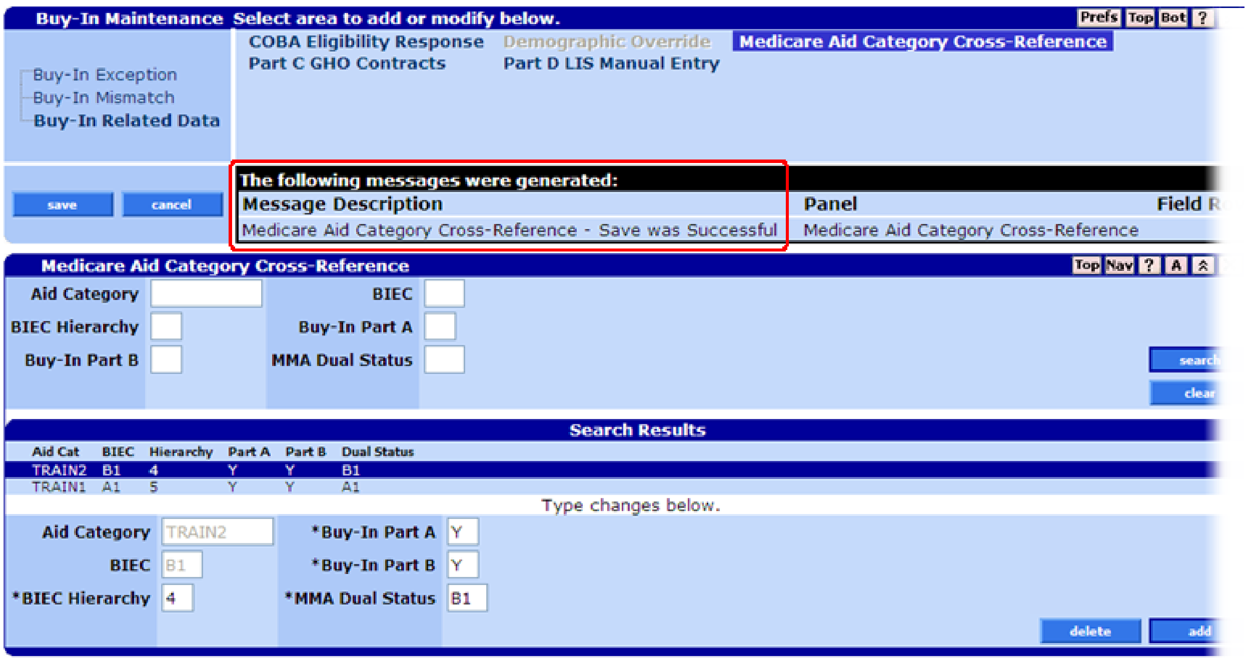
Follow these steps from the MITS home page to delete a Medicare aid category cross-reference record:

Step	Action
1	Click **Recipient**.
2	Click **buyin**.
3	Click the **Buy-In Related Data** category in the **Buy-In Maintenance** panel.
4	Click **Medicare Aid Category Cross-Reference**.
5	Click the row of the record you want to delete in the **Search Results** panel. **Note:** If there are too many records to find the one you want easily or if the record is from a previous month, search for the desired record in the **Medicare Aid Category Cross-Reference** panel.
6	Click **delete**.
7	Click **OK** to confirm the deletion. **Note**: You do **not** need to click **save** because the record is deleted **immediately**.

Success

You have successfully searched for a record when the record you want appears on your screen. You have successfully deleted a record when the row no longer appears in the Search Results panel.

You have successfully created a new record when you see the system message "Save was Successful" as shown here:



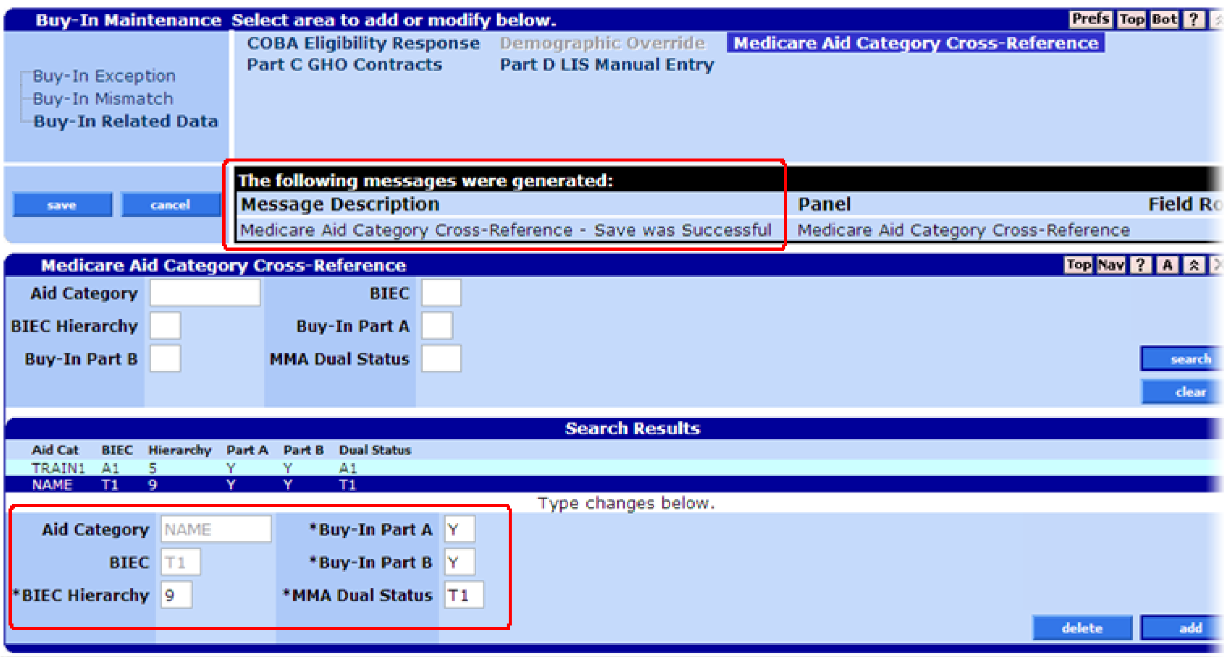
Ohio Medicaid Information Technology System

Practice

Create a Medicare aid category cross-reference using this information:

- **Aid Category:** your first name
- **BIEC:** T1
- **BIEC Hierarchy:** 9
- **Buy-In Part A:** Y
- **Buy-In Part B:** Y
- **Dual:** T1

When you complete this practice, your Medicare Aid Category Cross-Reference panel should look similar to this example:



Summary

In this topic you learned how to create, search for, update, and delete a Medicare aid category cross-reference record.

Reminders

- These tasks are rarely necessary because they are usually performed by the Early Adopter System, a contractor for the State of Ohio.
- Only super users can create new records or make updates.
- You perform these tasks for technical support purposes only.

Maintaining Part C GHO Contracts Records

What

In this topic you learn how to create, search for, update, and delete a Part C GHO contracts record.

GHO

GHO stands for Group Health Organization.

This is rarely necessary because these tasks are usually performed by the Early Adopter System, a contractor for the State of Ohio. You should not need to add a record or make updates.

Who

A Buy-In Unit staff member performs these tasks. However, only super users can create new records or make updates.

When

You perform these tasks for technical support purposes only.

Relevance

If you do not make the appropriate additions or changes, the Part C GHO contracts record will **not** be added or updated correctly.

Guidelines

When you open the Part C GHO Contracts panel, MITS automatically displays the corresponding Search Results panel.

Creating a Part C GHO Contracts Record

Follow these steps from the MITS home page to create a Part C GHO contracts record:

Step	Action
1	Click **Recipient**.
2	Click **buyin**.
3	Click the **Buy-In Related Data** category in the **Buy-In Maintenance** panel.
4	Click **Part C GHO Contracts.**
5	Click **add**.
6	Type the appropriate information in the fields. All fields are required.
7	Click **save**.

Searching for and Updating a Part C GHO Contracts Record

Follow these steps from the MITS home page to search for and update a Part C GHO contracts record:

Step	Action
1	Click **Recipient**.
2	Click **buyin**.
3	Click the **Buy-In Related Data** category in the **Buy-In Maintenance** panel.
4	Click **Part C GHO Contracts**.
5	Click the row of the record you want to view or update in the **Search Results** panel. **Note:** If there are too many records to find the one you want easily or if the record is from a previous month, search for the desired record in the **Part C GHO Contracts** panel.
6	<u>Super users only</u>: a. Type the new information in the appropriate field(s). b. Click **save**. **Note:** The **Contract** field **cannot** be changed.

Deleting a Part C GHO Contracts Record

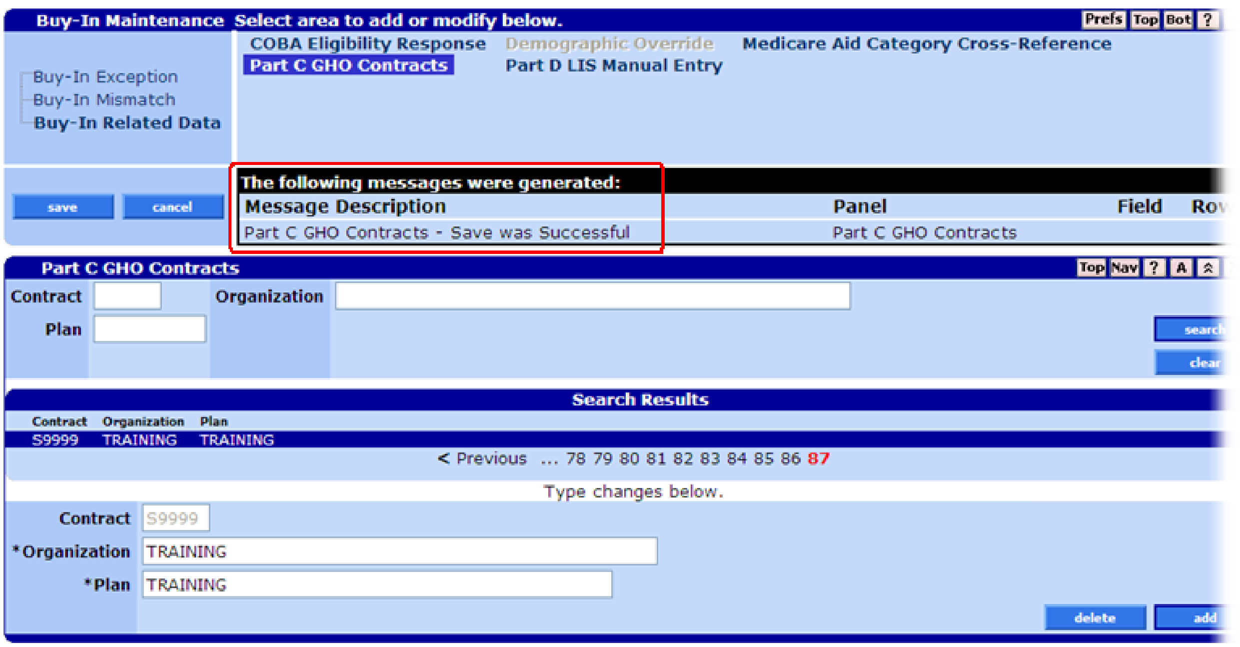
Follow these steps from the MITS home page to delete a Part C GHO contracts record:

Step	Action
1	Click **Recipient**.
2	Click **buyin**.
3	Click the **Buy-In Related Data** category in the **Buy-In Maintenance** panel.
4	Click **Part C GHO Contracts**.
5	Click the row of the record you want to delete in the Search Results panel. **Note:** If there are too many records to find the one you want easily or if the record is from a previous month, search for the desired record in the **Part C GHO Contracts** panel.
6	Click **delete**.
7	Click **OK** to confirm the deletion. **Note**: You do **not** need to click **save** because the record is deleted **immediately**.

Success

You have successfully searched for a record when the record you want appears on your screen. You have successfully deleted a record when the row no longer appears in the Search Results panel.

You have successfully created a new record when you see the system message "Save was Successful" as shown here:

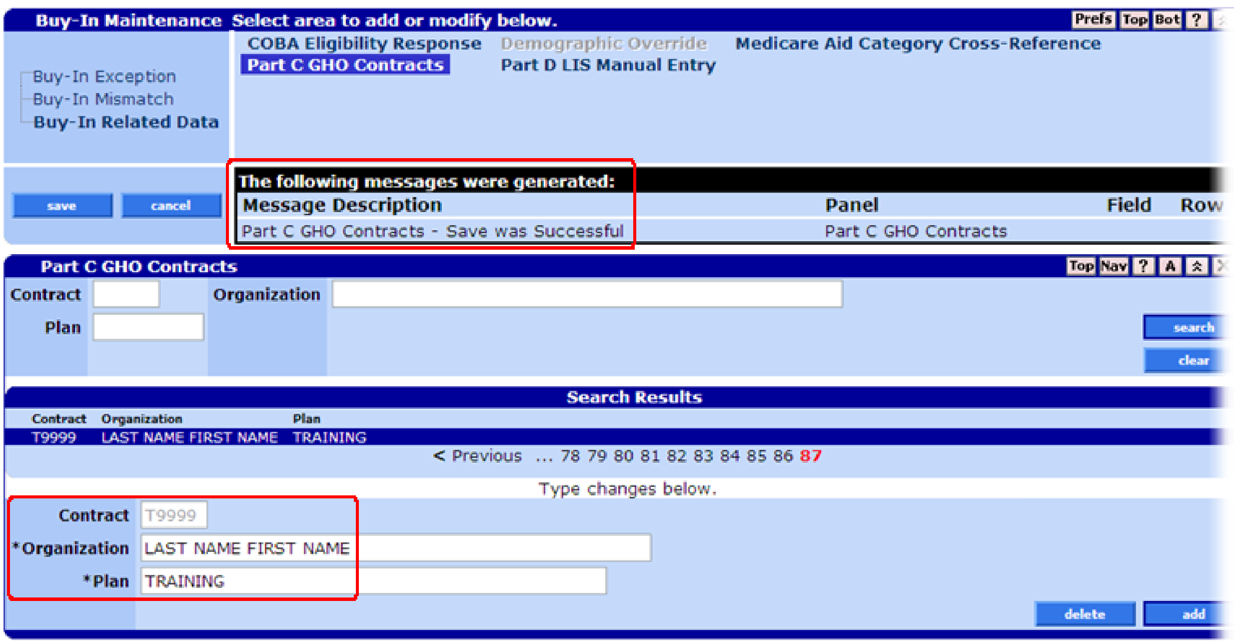


Practice

Create a Part C GHO contracts record using this information:

- **Contract:** T9999
- **Organization:** Your last name, then your first name
- **Plan:** TRAINING

When you complete this practice, your Part C GHO Contracts panel should look similar to this example:



Summary

In this topic you learned how to create, search for, update, and delete a Part C GHO contracts record.

Reminders

- These tasks are rarely necessary because they are usually performed by the Early Adopter System, a contractor for the State of Ohio.
- Only super users can create new records or make updates.
- You perform these tasks for technical support purposes only.

Maintaining Part D LIS Entry Records

What

In this topic you learn how to create, search for, update, and delete a Part D LIS entry record.

> **LIS**
>
> LIS stands for Low Income Subsidy.

This is rarely necessary because these tasks are usually performed by the County case worker. You should **not** need to add a record or make updates.

Who

A Buy-In Unit staff member performs these tasks. However, only super users can create new records or make updates.

When

You perform these tasks for technical support purposes only.

Relevance

If you do not make the appropriate additions or changes, the Part D LIS entry record will **not** be added or updated correctly.

Guidelines

When you open the Part D LIS Manual Entry panel, MITS automatically displays the corresponding Search Results panel.

Creating a Part D LIS Entry Record

Follow these steps from the MITS home page to create a Part D LIS manual entry record:

Step	Action
1	Click **Recipient**.
2	Click **buyin**.
3	Click the **Buy-In Related Data** category in the **Buy-In Maintenance** panel.
4	Click **Part D LIS Manual Entry**.
5	Click **add**.
6	Type data or make selections in the fields.
7	Click **save**.

Searching for and Updating a Part D LIS Entry Record

Follow these steps from the MITS home page to search for and update a Part D LIS manual entry record:

Step	Action
1	Click **Recipient**.
2	Click **buyin**.
3	Click the **Buy-In Related Data** category in the **Buy-In Maintenance** panel.
4	Click **Part D LIS Manual Entry**.
5	Click the row of the record you want to view or update in the **Search Results** panel. **Note:** If there are too many records to find the one you want easily or if the record is from a previous month, search for the desired record in the **Part D LIS Manual Entry** panel.
6	<u>Super users only</u>: a. Type the new information or make selections in the appropriate field(s). b. Click **save.**

Deleting a Part D LIS Entry Record

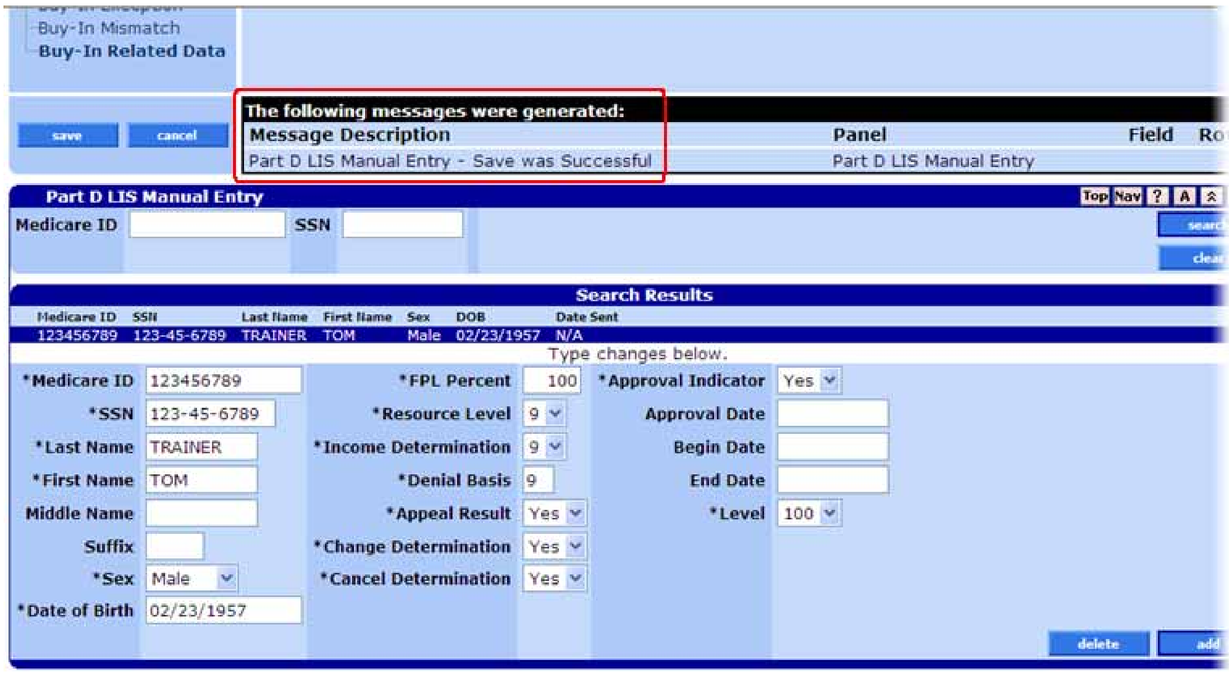
Follow these steps from the MITS home page to delete a Part D LIS manual entry record:

Step	Action
1	Click **Recipient**.
2	Click **buyin**.
3	Click the **Buy-In Related Data** category in the **Buy-In Maintenance** panel.
4	Click **Part D LIS Manual Entry**.
5	Click the row of the record you want to delete in the **Search Results** panel. **Note:** If there are too many records to find the one you want easily or if the record is from a previous month, search for the desired record in the **Part D LIS Manual Entry** panel.
6	Click **delete**.
7	Click **OK** to confirm the deletion. **Note**: You do **not** need to click **save** because the record is deleted **immediately**.

Success

You have successfully searched for a record when the record you want appears on your screen. You have successfully deleted a record when the row no longer appears in the Search Results panel.

You have successfully created a new record when you see the system message "Save was Successful" as shown here:

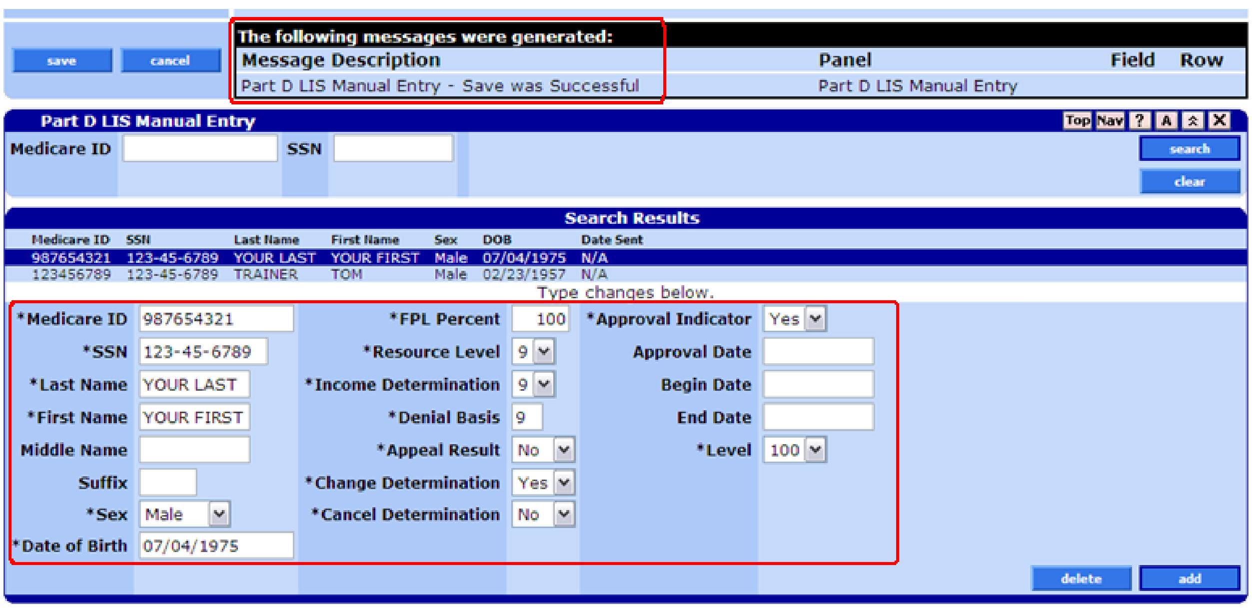


Practice

Create a Part D LIS manual entry record using this information:

- **Medicare ID:** 987654321
- **SSN:** 123456789
- **Last Name:** Use your own
- **First Name:** Use your own
- **Sex:** Use your own
- **Date of Birth:** 07/04/1975
- **Appeal Result:** No
- **Change Determination:** Yes
- **Cancel Determination:** No
- Accept the defaults in all other fields

When you complete this practice, your Part D LIS Manual Entry panel should look similar to this example:



Summary

In this topic you learned how to create, search for, update, and delete a Part D LIS manual entry record.

Reminders

- These tasks are rarely necessary because they are usually performed by the County case worker.
- Only super users can create new records or make updates.
- You perform these tasks for technical support purposes only.

Searching for COBA Eligibility Response Records

What

In this topic you learn how to view a COBA eligibility response record.

COBA

COBA stands for Coordination of Benefits Agreement.

This task is rarely necessary because it is usually performed by the Early Adopter System, a contractor for the State of Ohio.

The COBA eligibility response record is a summary of records that were:

- Submitted
- Added
- Updated
- Deleted

It also shows the number of errors that were encountered by the Coordination of Benefits Contractor (COBC) while processing the State's file

Who

A Buy-In Unit staff member performs this task.

When

You perform this task on a monthly basis.

Relevance

Being able to perform this task allows you to view the COBA eligibility response records processed for the month, which is a method of sharing Medicare and Medicaid coverage with outside entities.

Requirements

Before you begin this task you should have the COBA Eligibility Response Report (BUY-6510-M).

How To

Follow these steps from the MITS home page to search for a COBA eligibility response record:

Step	Action
1	Click **Recipient**.
2	Click **buyin**.
3	Click **Buy-In Related Data**.
4	Click **COBA Eligibility Response**.
5	Type information or make selections in the desired field(s) to narrow your search. At least one search criteria is required.
6	Click **search**.
7	Click the row of the record you want to view in the **Search Results** panel. **Note:** If there are too many records to find the one you want easily or if the record is from a previous month, search for the desired record in the **COBA Eligibility Response** panel.

Success

You have successfully completed this task when a COBA eligibility response record appears.

Next Steps

You may need to perform one of these follow-up tasks:

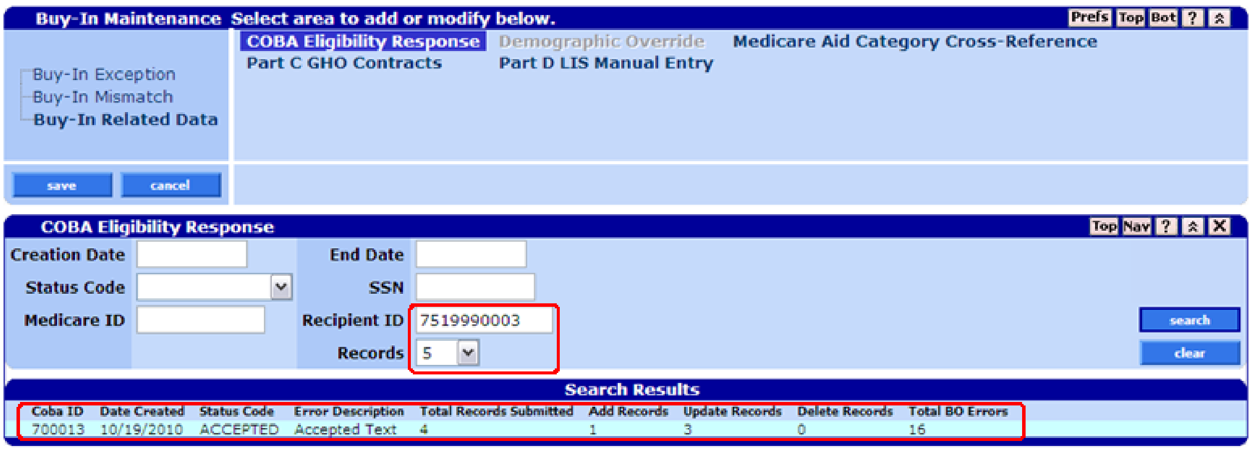
- View the appropriate COBA Eligibility Response Report (BUY-6510-M).
- Call or email the Early Adopter System staff with any corrections.

Practice

Search for a COBA eligibility response record using this information:

- **Recipient ID:** 7519990003
- **Records:** 5

When you complete this practice, your COBA Eligibility Response panel should look similar to this example:



Summary

In this topic you learned how to view a COBA eligibility response record.

Ohio Medicaid Information Technology System

Searching for and Updating a Medicare A or B Buy-In Mismatch Record

What

In this topic you learn how to search for and update a Medicare A or B Buy-In mismatch record.

This is rarely necessary because these tasks are usually performed by the Early Adopter System, a contractor for the State of Ohio. You should **not** need to make updates.

Who

A Buy-In Unit staff member performs these tasks. However, only super users can make updates.

When

You perform these tasks for technical support purposes only.

Relevance

If you do not make the appropriate updates, mismatched records will **not** be resolved.

Requirements

Before you begin this task you should have the Buy-In Weekly Mismatches Report (BUY-1110-W).

Guidelines

When you open a Buy-In Mismatch Search panel, MITS automatically displays the corresponding Search Results panel showing information for all transactions not processed within the past 30 days. MITS refreshes the information on the first day of every month, showing the information for the current month only. If you need information for a past month, use the Buy-In Mismatch Search panel to search for the desired record.

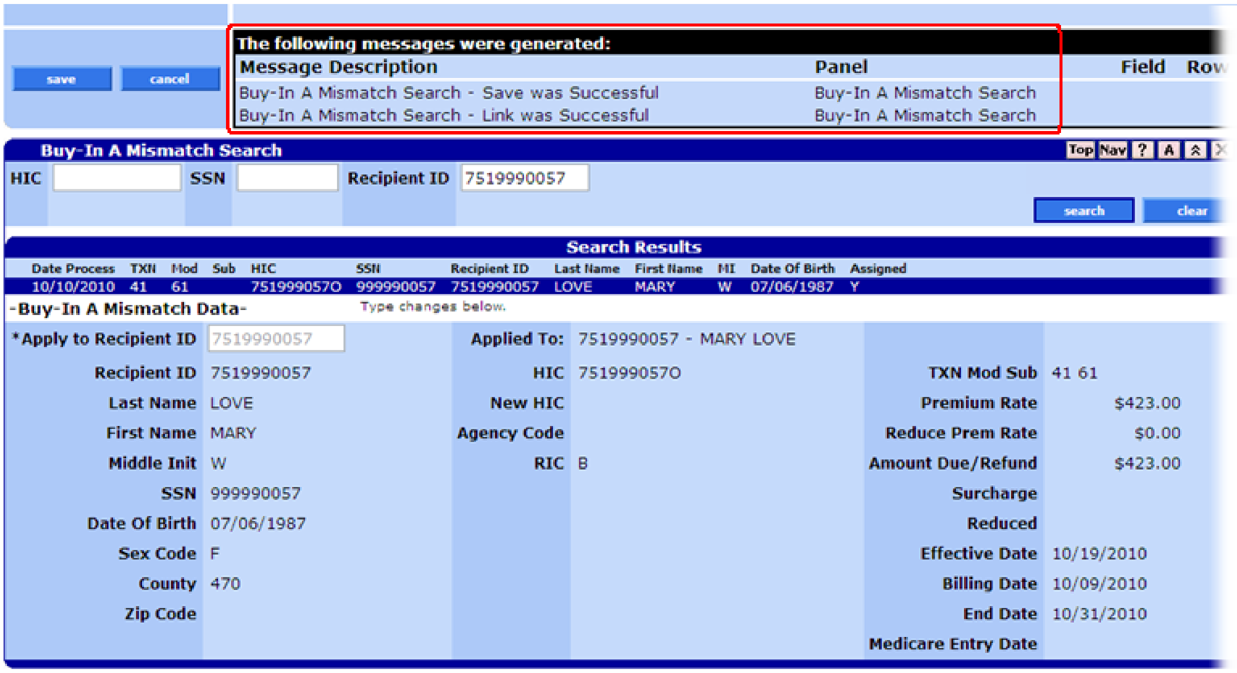
How To

Follow these steps from the MITS home page to search for and update a Medicare A or B Buy-In mismatch record:

Step	Action
1	Click **Recipient**.
2	Click **buyin**.
3	Click **Buy-In Mismatch**.
4	Click the **Buy-In Mismatch Search** panel (A or B) you want to open.
5	Click the row of the record you want to view or update in the **Search Results** panel. **Note:** If there are too many records to find the one you want easily or if the record is from a previous month, search for the desired record in the **Buy-In Mismatch Search** panel.
6	Super users only: a. Type information in the **Apply to Recipient ID** field. b. Modify the information in the remaining fields, if needed. c. Click **save.**

Success

You have successfully searched for a record when the record you want appears on your screen. You have successfully updated a record when you see the system message "Save was Successful" as shown here:

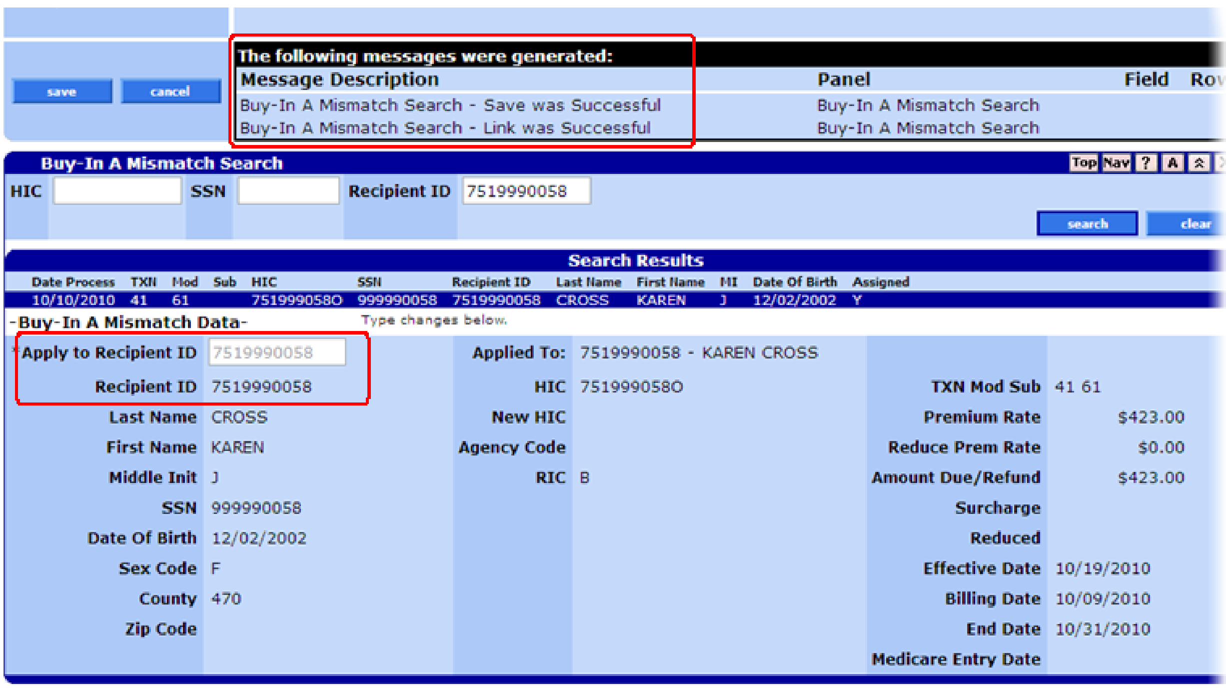


Practice

Using the recipient information provided by your instructor, search for and update a Medicare A Buy-In mismatch record using this information:

- Search for and display the Medicare A Buy-In mismatch record for your recipient **ONLY**. (There should be only one.)
- Add your recipient's ID to the **Apply to Recipient ID** field.

When you complete this practice, your Buy-In A Mismatch Data panel should look similar to this example:



Summary

In this topic you learned how to search for and update a Medicare A or B Buy-In mismatch record.

Reminders

- These tasks are rarely necessary because they are usually performed by the Early Adopter System, a contractor for the State of Ohio.
- Only super users can make updates.
- You perform these tasks for technical support purposes only.

Searching for Medicare A or B 1167 Mismatch Records

What

In this topic you learn how to view a Medicare A or B 1167 mismatch record.

This is rarely necessary because this task is usually performed by the Early Adopter System, a contractor for the State of Ohio.

Who

A Buy-In Unit staff member performs this task.

When

You perform this task when the Buy-In Weekly Mismatches Report (BUY-1110-W) lists transactions received from the Centers for Medicare and Medicaid Services (CMS) that could not be automatically matched to a recipient.

Relevance

Being able to perform this task allows you to quickly determine whether all Medicare transactions for the month have been processed.

Requirements

Before you begin this task you should have the Buy-In Weekly Mismatches Report (BUY-1110-W).

Guidelines

When you open a Medicare 1167 Mismatch panel, MITS automatically displays the corresponding Search Results panel showing information for all transactions not processed within the past 30 days. MITS refreshes the information on the first day of every month, showing the information for the current month only. If you need information for a past month, use the Medicare 1167 Mismatch panel to search for the desired record.

How To

Follow these steps from the MITS home page to search for a Medicare A or B 1167 mismatch record:

Step	Action
1	Click **Recipient**.
2	Click **buyin**.
3	Click **Buy-In Exception**.
4	Click the **Medicare 1167 Mismatch** panel (A or B) you want to open.
5	Click the row of the record you want to view in the **Search Results** panel. **Note:** If there are too many records to find the one you want easily or if the record is from a previous month, search for the desired record in the **Medicare 1167 Mismatch** panel.

Success

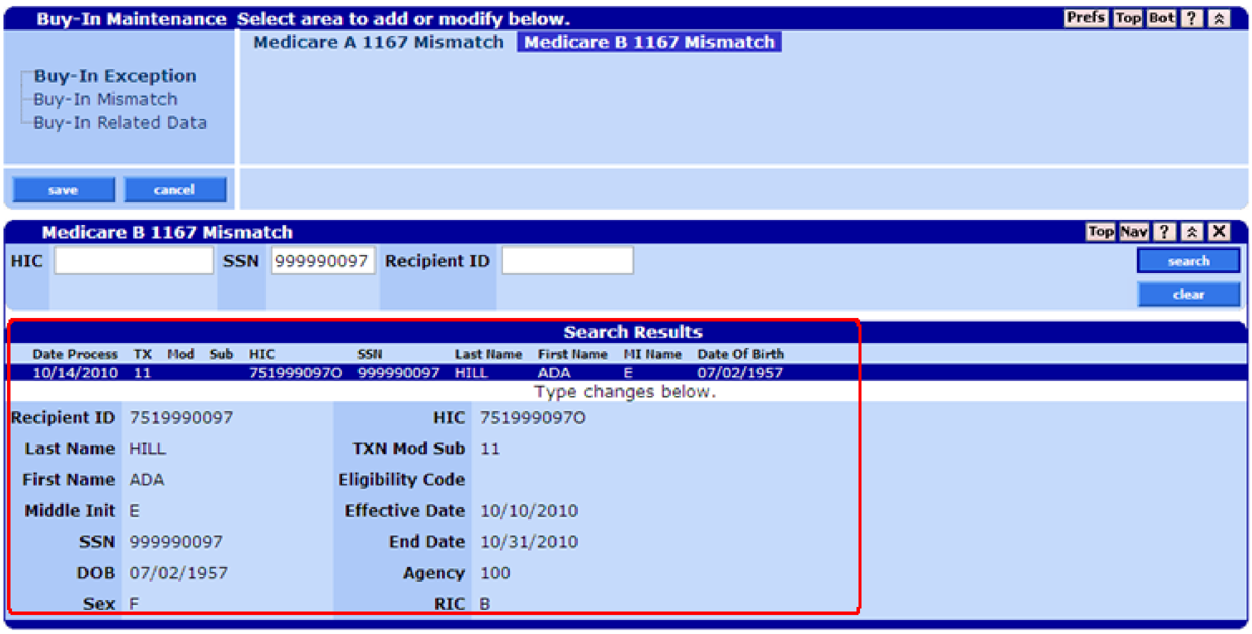
You have successfully completed this task when a Medicare A or B 1167 mismatch record appears.

Practice

Search for a Medicare B 1167 mismatch record using this information:

SSN: 999990097 (Hill, Ada)

When you complete this practice, your Medicare B 1167 Mismatch panel should look like this:



Summary

In this topic you learned how to view a Medicare A or B 1167 mismatch record.

Reminders

This task is rarely necessary because it is usually performed by the State of Ohio's contractor, the Early Adopter System.

Maintaining Part D PDP Carrier Records

What

In this topic you learn how to create, search for, and update a Part D PDP carrier record. This is a very rare event because this information is usually maintained via an electronic data feed.

New carriers for PDP are assigned and approved by the State.

PDP

PDP stands for Prescription Drug Program.

Who

A Buy-In Unit staff member performs these tasks. However, only super users can make updates.

When

You should create a record after being notified of approval of a new carrier, usually from a report or other internal communication. You may also receive a notice from a provider.

You should update a record when you are informed of a need to change the information, which may come from a provider representative, provider, the claims unit, or when you check your own work.

Relevance

Your ability to perform these tasks helps the State maintain a current and accurate database for processing claims and supports regulatory compliance. Being able to search for Part D PDP records enables you to answer questions when needed. If you have super user security you can also make corrections to information such as the carrier name or the carrier and plan indicators.

Without an appropriate carrier, MITS **cannot** link the correct benefit coverage to the recipient.

Requirements

To successfully complete this task you need the information required to complete the fields:

- Carrier name
- Carrier status
- Plan status

Guidelines

Before you create a new record, you should verify that the carrier is appropriate to add to the database.

Warning! You **cannot** manually delete Part D PDP carrier records.

Creating a Part D PDP Carrier Record

Follow these steps from the MITS home page to create a Part D PDP carrier record:

Step	Action
1	Click **Recipient**.
2	Click **related data.**
3	Click the **Codes** category link in the **Related Data** panel.
4	Click **PDP Carrier / Plan Type**.
5	Click **add**.
6	Type a two-character code in the **Type Code** field. **Note:** You can use any alphanumeric code not currently in use or previously deactivated.
7	Type data or make a selection in the remaining fields. **Notes:** The **Description** field usually contains the name of the carrier. At least one of the drop-down selections must be set to **Yes**.
8	Click **save**.

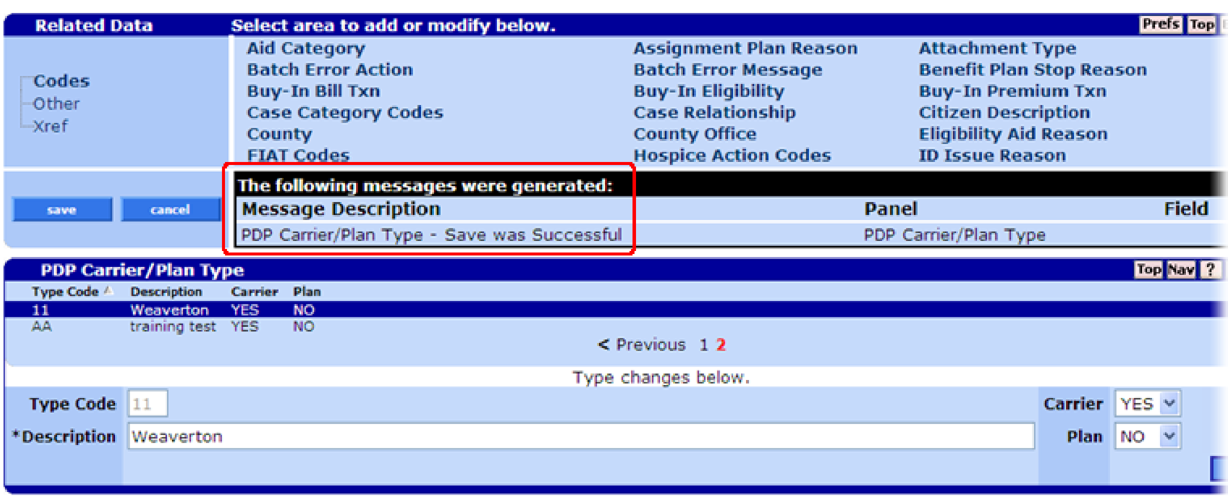
Searching for and Updating a Part D PDP Carrier Record

Follow these steps from the MITS home page to search for and update a Part D PDP carrier record:

Step	Action
1	Click **Recipient**.
2	Click **related data.**
3	Click the **Codes** category link in the **Related Data** panel.
4	Click **PDP Carrier/Plan Type**.
5	Click the row of the desired carrier record.
6	<u>Super users only</u>: a. Modify the content of the fields as desired. b. Click **save**. **Note:** The **Type Code** field **cannot** be modified.

Success

You have successfully completed these tasks when you see the system message "Save was Successful" as shown here:

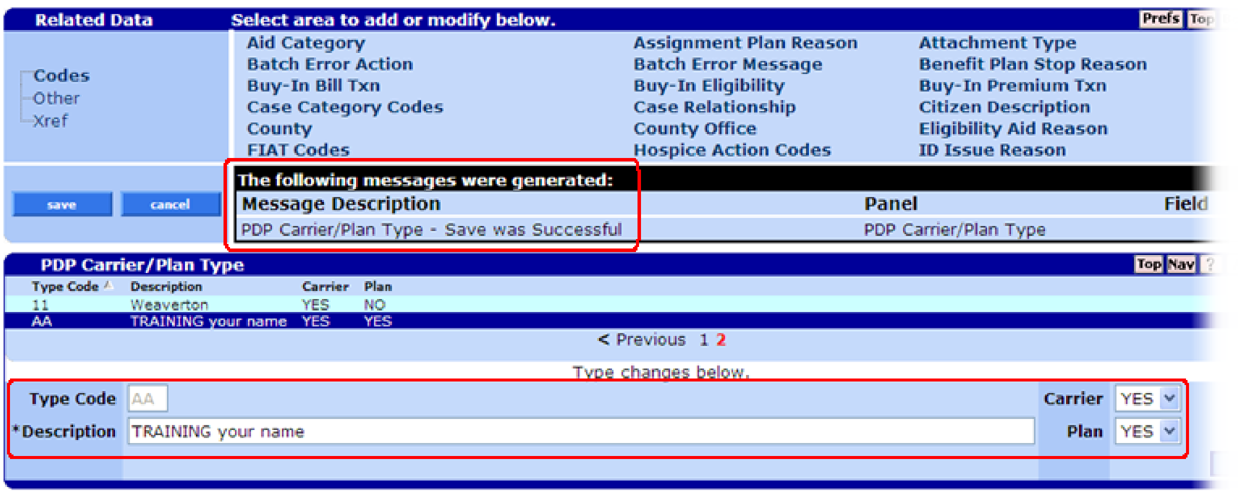


Practice

Create a new Part D PDP carrier record using this information:

- **Type Code:** Use your first and last initials
- **Description:** TRAINING plus your name
- **Carrier:** Yes
- **Plan:** Yes

When you complete this practice, your PDP Carrier/Plan Type panel should look similar to this example:



Summary

In this topic you learned how to create, search for, and update a Part D PDP carrier record.

Reminders

- You should verify that the carrier is appropriate to add to the database before you create a new record.
- Only super users can update existing records.
- You **cannot** manually delete Part D PDP carrier records.

Review

Objectives

In this course, you learned how to:

- View and print Medicare Modernization Act (MMA) reports
- View and print the annual CMS 372 reports
- Create, search for, update, and delete these segment records:
    - Medicare A Coverage
    - Medicare B Coverage
    - Medicare Buy-In A Combined
    - Medicare Buy-In B Combined
    - Medicare ID
- Create, search for, update, and delete these records:
    - Medicare aid category cross-reference
    - Part C Group Health Organization (GHO) contracts
    - Part D Low Income Subsidy (LIS) entry
- Search for and update Medicare A or B Buy-In Mismatch records
- Search for these records:
    - Medicare A or B 1167 Mismatch
    - Coordination of Benefits Agreement (COBA) Eligibility Response
- Create, search for, and update a Part D PDP Carrier record