

Coverage Gap Discount Program



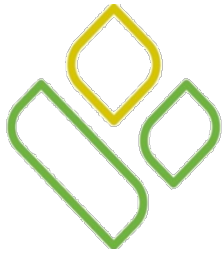
CGDP PORTAL DPP- MANUFACTURERS



PALMETTO GBA®

A CELERIAN GROUP COMPANY

Receipts Tab Functionality



CGDP Portal DPP-Manufacturers – Topics

In this training session you will learn about the Coverage Gap Discount Program (CGDP) Portal Direct Payment Process (DPP)-Manufacturers **Receipts** tab.

This training will introduce you to the following topics:

1. First look introduction of the **Receipts** Tab
2. **Receipts** tab regions
 - **Tabbed region – Receipts**
 - **Receipts Invoiced Reporting Period region**
 - **Receipts Filter region**
 - **Receipts Payment Information region**
 - **Receipts Filter Results region**
 - **Receipts Status Definitions region**
3. Work Instruction for utilizing the **Receipts** tab functionality

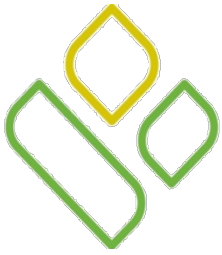
CGDP PORTAL DPP- MANUFACTURERS



PALMETTO GBA®

A CELERIAN GROUP COMPANY

*Introduction to the
Receipts Tab*



CGDP Portal DPP-Manufacturers Receipts Tab

The **Receipts** tab allows the user to review negative invoice line item information for updated invoiced line items by Part D Sponsor Contract Number.

This training session will describe each of the six regions displayed on the **Receipts** tab and provide direction on the functionality of each.

Palmetto GBA | **CMS** | Contact Us | My Profile | Logout | Help | Reporting

1 Home Payments Completed **Receipts** Reports

Manufacturer Portal CGDP Receipt Status

2 Invoiced Reporting Period: 201403

3 Contract Number: ANY Corporate ID: XP1__8 P Number: P1__8

Contract	Invoiced Amt.	Payment Date	EFTID	Status
S1__0	613.10	12/30/2014	CG14031__8S1__0	Received
H1__2	2.86	12/30/2014	CG14031__8H1__2	Deferred
S5__0	1570.91		CG14031__8S5__0	Outstanding
H3__2	445.12		CG14031__8H3__2	Outstanding
H0__1	75.38		CG14031__8H0__1	Outstanding
H1__9	352.00		CG14031__8H1__9	Outstanding

4 **Payment Information**

Total Owed	3059.37
Total Received	613.10
Total Deferred	2.86
Total Outstanding	2443.41

6 **Received** - Payment is in your account
Pending - Payment has been initiated
Outstanding - No payment activity
Deferred - Invoice amount falls below minimum
Failed - One or more items has an unsuccessful payment attempt

CGDP PORTAL DPP- MANUFACTURERS



PALMETTO GBA®

A CELERIAN GROUP COMPANY

Receipts Tab Regions



CGDP Portal DPP-Manufacturers Tabbed & Invoiced Reporting Period Regions

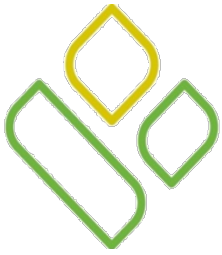
The first two regions of the **Receipt** tab are:

The screenshot shows the user interface of the CGDP Portal. At the top left is the Palmetto GBA logo. To the right is the CMS logo with the text 'CENTERS FOR MEDICARE & MEDICAID SERVICES'. Further right are links for 'Contact Us', 'My Profile', 'Logout', 'Help', and 'Reporting'. Below this is a navigation bar with tabs for 'Home', 'Payments', 'Completed', 'Receipts', and 'Reports'. The 'Receipts' tab is highlighted with a red box and a circled '1'. Below the navigation bar is a horizontal line, followed by the text 'Manufacturer Portal CGDP Receipt Status' and 'Invoiced Reporting Period: 201403', with a circled '2' next to the reporting period.

The **Tabbed region** allows the user to select different activities to perform while accessing the system. The **Tabbed region – Receipts** page provides access to the **Receipts** page to review the status of negative invoice line item information due for payment from the Part D Sponsor.

The **Receipts Invoiced Reporting Period region** displays the specified reporting period, in YYYYQQ format, based on the reporting period selected in the **Home Filter region**. In this example, the invoice line items for the 3rd quarter of calendar year 2014 will appear in the **Receipts Filter region** of the **Receipts** tab.


In this example, the **Receipts** tab is active and the **Receipts Invoiced Reporting Period** for displayed invoice line items is the 3rd quarter of calendar year 2014.



CGDP Portal DPP-Manufacturers Receipts Filter Region

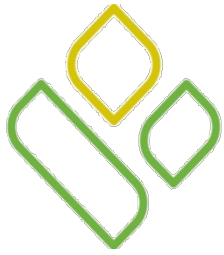
The third region of the **Receipts** tab, the **Receipts Filter region**, contains the following three fields to assist with narrowing completed invoice criteria.

Manufacturer Portal CGDP Receipt Status

③ Contract Number: ANY ▼ Corporate ID: XP1__8 P Number: P1__8 ▼ 

- Contract Number: allows the user to select specific contract numbers from the drop down list. The drop down list provides update capability to select another contract number with negative line items due within the same reporting period.
- Corporate ID: defaults to the Corporate ID, formerly the Mailbox ID, used to log into the Portal.
- P Number: displays the P Number for negative invoice line items. This field defaults based on the distributed invoice selected on the **Home** tab. The drop down list provides update capability to select another P Number from those assigned to the Corporate ID..

In the example, the Contract Number field displays the default selection of 'ANY', Corporate ID field displays the default Corporate ID used to access the Portal, and the P Number field displays the P Number associated with the distributed invoice selected on the **Home** tab.



CGDP Portal DPP-Manufacturers Receipts Payment Information Region

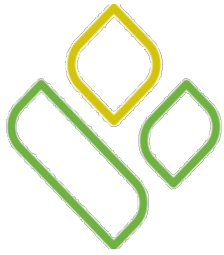
The fourth region of the **Receipts** tab, the **Receipts Payment Information region**, provides a summary view of activities that occur on the **Receipts** tab.

4

<u>Payment Information</u>	
Total Owed	3059.37
Total Received	613.10
Total Deferred	2.86
Total Outstanding	2443.41

This region contains the following four fields to provide up-to-date data regarding invoice line item activity.

- Total Owed: displays total dollar amount of negative invoice line items due from Part D Sponsors.
- Total Received: displays the total dollar amount of negative invoice line items received from Part D Sponsors.
- Total Deferred: displays the total dollar amount of deferred negative invoice line items less than the system-default allowable amount not received from Part D Sponsors.
- Total Outstanding: displays the total dollar amount of negative invoice line items pending payment receipt from Part D Sponsors.



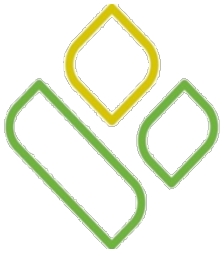
CGDP Portal DPP-Manufacturers Receipts Filter Results Region

The fifth region of the **Receipts** tab, the **Receipts Filter Results region**, provides a detail view of invoice line item statuses.

5	Contract	Invoiced Amt.	Payment Date	EFTID	Status
	S1__0	613.10	12/30/2014	CG14031__8S1__0	Received
	H1__2	2.86	12/30/2014	CG14031__8H1__2	Deferred
	S5__0	1570.91		CG14031__8S5__0	Outstanding
	H3__2	445.12		CG14031__8H3__2	Outstanding
	H0__1	75.38		CG14031__8H0__1	Outstanding
	H1__9	352.00		CG14031__8H1__9	Outstanding

This form contains the following five fields that provide listings of negative invoice line items that are pending payment receipt from a Part D Sponsor.

- Contract : displays the Part D Sponsor Contract Number.
- Invoiced Amt.: displays the negative invoice line item amounts processed from the Part D Sponsor
- Payment Date: displays information regarding the status of the payment.
 - Displays calendar date, in MM/DD/YYYY format, for payments containing a status of 'Received'.
 - Displays calendar date, in MM/DD/YYYY format, for payments containing a status of 'Deferred'.
 - Displays blank field for payments not yet initiated containing a status of 'Outstanding'.
- EFT ID: displays EFT identifying information in the specified format of CG for Coverage Gap; YYQQ for the reporting period; ##### for the P Number and ##### for the Contract Number for invoice line items with a Received status.
 - Example: CG14011##8H###3.
- Status: displays the status of negative invoice line items listed in the **Receipts Filter Results region**.



CGDP Portal DPP-Manufacturers Receipts Status Definitions Region

The sixth and final region of the **Receipts** tab, the **Receipts Status Definitions region** provides explanations of each of the statuses that may display in the **Receipts Filter Results region**.

- ⑥
- Received** - Payment is in your account
 - Pending** - Payment has been initiated
 - Outstanding** - No payment activity
 - Deferred** - Invoice amount falls below minimum

This region contains five definitions that assist in reviewing invoices displayed on the **Receipts** tab.

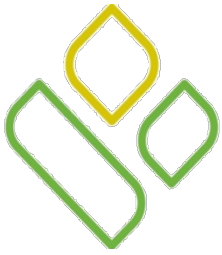
CGDP PORTAL DPP- MANUFACTURERS



PALMETTO GBA®

A CELERIAN GROUP COMPANY

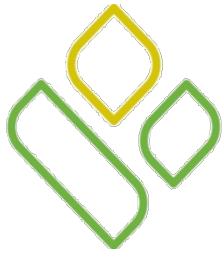
*Receipts Tab Functionality
Work Instruction*



CGDP Portal DPP-Manufacturers Receipts Tab Work Instructions

You have now learned about the different regions and fields available on the **Receipts** tab.

In this section of the training session, a high level overview of the steps needed to utilize the **Receipts** tab functionality will be presented on the following slides.



CGDP Portal DPP-Manufacturers Receipts Filter Search

Select a specific P Number from the drop down list in the P Number field of the **Receipts Filter region**.

In the following example, the P Number field is populated with P1__8 and the **Receipts** tab is active.

Manufacturer Portal CGDP Receipt Status Invoiced Reporting Period: 201403

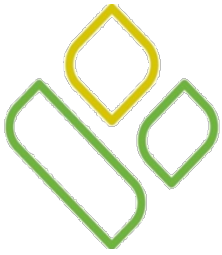
Contract Number: ANY Corporate ID: XP1__8 P Number: P1__8

Contract	Invoiced Amt.	Payment Date	EFTID	Status
S1__0	613.10	12/30/2014	CG14031__8S1__0	Received
H1__2	2.86	12/30/2014	CG14031__8H1__2	Deferred
S5__0	1570.91		CG14031__8S5__0	Outstanding
H3__2	445.12		CG14031__8H3__2	Outstanding
H0__1	75.38		CG14031__8H0__1	Outstanding
H1__9	352.00		CG14031__8H1__9	Outstanding

Payment Information

Total Owed	3059.37
Total Received	613.10
Total Deferred	2.86
Total Outstanding	2443.41

Received - Payment is in your account
Pending - Payment has been initiated
Outstanding - No payment activity
Deferred - Invoice amount falls below minimum



CGDP Portal DPP-Manufacturers Deferred Receipts Status

Locate an invoice line item(s) with the Status field populated with *Deferred* in the **Receipts Filter Results** region.

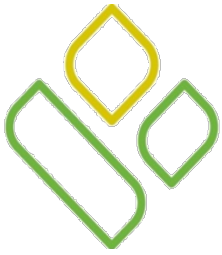
In the following example, the invoice line item of \$2.86 displays with the Status of *Deferred*.

The screenshot displays the CMS (Centers for Medicare & Medicaid Services) portal for Palmetto GBA. The page title is "Manufacturer Portal CGDP Receipt Status" with an "Invoiced Reporting Period: 201403". The navigation menu includes Home, Payments, Completed, Receipts (highlighted), Messages, and Reports. The filter section shows Contract Number: ANY, Corporate ID: XP1__8, and P Number: P1__8. A table lists invoice items with columns for Contract, Invoiced Amt., Payment Date, EFTID, and Status. The row for Contract H1__2 with an amount of 2.86 and status of Deferred is highlighted. A summary box on the right shows Payment Information: Total Owed 3059.37, Total Received 613.10, Total Deferred 2.86, and Total Outstanding 2443.41. A legend at the bottom right explains the status codes: Received (payment in account), Pending (payment initiated), Outstanding (no activity), and Deferred (amount below minimum).

Contract	Invoiced Amt.	Payment Date	EFTID	Status
S1__0	613.10	12/30/2014	CG14031__8S1__0	Received
H1__2	2.86	12/30/2014	CG14031__8H1__2	Deferred
S5__0	1570.91		CG14031__8S5__0	Outstanding
H3__2	445.12		CG14031__8H3__2	Outstanding
H0__1	75.38		CG14031__8H0__1	Outstanding
H1__9	352.00		CG14031__8H1__9	Outstanding

Payment Information	
Total Owed	3059.37
Total Received	613.10
Total Deferred	2.86
Total Outstanding	2443.41

Received - Payment is in your account
Pending - Payment has been initiated
Outstanding - No payment activity
Deferred - Invoice amount falls below minimum



CGDP Portal DPP-Manufacturers Received Receipts Status

Locate an invoice line item(s) with the Status field populated with *Received* in the **Receipts Filter Results** region.

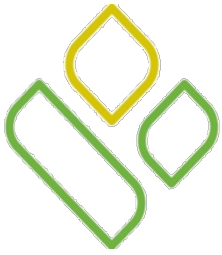
In the following example, the invoice line item of \$613.10 displays with the Status of *Received*

The screenshot displays the 'Manufacturer Portal CGDP Receipt Status' interface. At the top, there are navigation links for Home, Payments, Completed, Receipts (highlighted), Messages, and Reports. The main heading is 'Manufacturer Portal CGDP Receipt Status' with the 'Invoiced Reporting Period: 201403'. Below this, there are search filters for Contract Number (ANY), Corporate ID (XP1__8), and P Number (P1__8). A table lists invoice items with columns for Contract, Invoiced Amt., Payment Date, EFTID, and Status. The first row, with Contract S1__0, Invoiced Amt. 613.10, Payment Date 12/30/2014, EFTID CG14031__8S1__0, and Status Received, is highlighted with a red border. To the right, a 'Payment Information' box shows Total Owed (3059.37), Total Received (613.10, highlighted with a red border), Total Deferred (2.86), and Total Outstanding (2443.41). A legend at the bottom right explains the status terms: Received (payment in account), Pending (payment initiated), Outstanding (no activity), and Deferred (amount below minimum).

Contract	Invoiced Amt.	Payment Date	EFTID	Status
S1__0	613.10	12/30/2014	CG14031__8S1__0	Received
H1__2	2.86	12/30/2014	CG14031__8H1__2	Deferred
S5__0	1570.91		CG14031__8S5__0	Outstanding
H3__2	445.12		CG14031__8H3__2	Outstanding
H0__1	75.38		CG14031__8H0__1	Outstanding
H1__9	352.00		CG14031__8H1__9	Outstanding

Payment Information	
Total Owed	3059.37
Total Received	613.10
Total Deferred	2.86
Total Outstanding	2443.41

Received - Payment is in your account
Pending - Payment has been initiated
Outstanding - No payment activity
Deferred - Invoice amount falls below minimum



CGDP Portal DPP-Manufacturers Outstanding Receipts Status

Locate an invoice line item(s) with the Status field populated with *Outstanding* in the **Receipts Filter Results** region.

In the following example, the invoice line items of \$1,570.91, \$445.12, \$75.38 and \$352.00 display the Status of *Outstanding*.

The screenshot displays the CMS (Centers for Medicare & Medicaid Services) portal for Palmetto GBA. The page title is "Manufacturer Portal CGDP Receipt Status" for the Invoiced Reporting Period of 201403. The "Receipts" tab is selected in the navigation menu. The search filters show Contract Number: ANY, Corporate ID: XP1__8, and P Number: P1__8. A table lists invoice line items with columns for Contract, Invoiced Amt., Payment Date, EFTID, and Status. Four items are highlighted with a red border: S5__0 (\$1,570.91), H3__2 (\$445.12), H0__1 (\$75.38), and H1__9 (\$352.00), all with a status of "Outstanding". To the right, a "Payment Information" box shows a Total Outstanding of 2443.41. A legend at the bottom right explains the status codes: Received (payment in account), Pending (payment initiated), Outstanding (no payment activity), and Deferred (amount below minimum).

Contract	Invoiced Amt.	Payment Date	EFTID	Status
S1__0	613.10	12/30/2014	CG14031__8S1__0	Received
H1__2	2.86	12/30/2014	CG14031__8H1__2	Deferred
S5__0	1570.91		CG14031__8S5__0	Outstanding
H3__2	445.12		CG14031__8H3__2	Outstanding
H0__1	75.38		CG14031__8H0__1	Outstanding
H1__9	352.00		CG14031__8H1__9	Outstanding

Payment Information	
Total Owed	3059.37
Total Received	613.10
Total Deferred	2.86
Total Outstanding	2443.41

Received - Payment is in your account
Pending - Payment has been initiated
Outstanding - No payment activity
Deferred - Invoice amount falls below minimum

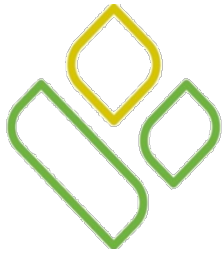
CGDP PORTAL DPP- MANUFACTURERS



PALMETTO GBA®

A CELERIAN GROUP COMPANY

Training Review

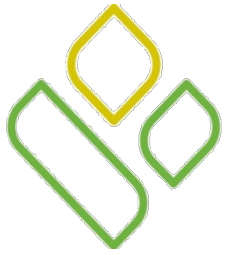


CGDP Portal DPP-Manufacturers –Training Review

In this training session you have learned about the CGDP Portal DPP-Manufacturers **Receipts** tab.

This training introduced you to the following topics:

1. First look introduction of the **Receipts** Tab
2. **Receipts** tab Regions
 - **Tabbed region – Receipts**
 - **Receipts Invoiced Reporting Period region**
 - **Receipts Filter region**
 - **Receipts Payment Information region**
 - **Receipts Filter Results region**
 - **Receipts Status Definitions region**
3. Work Instruction for utilizing the **Receipts** tab functionality



CGDP Portal DPP-Manufacturers – Questions

Questions?

