Coverage Gap
Discount Program

CMS
CENTERS FOR MEDICARE & MEDICAID SERVICES

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# CGDP PORTAL DPP- MANUFACTURERS

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## *Reports - Batch 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 **Reports** tab and the **Reports – Batch** functionality.

This training will introduce you to the following topics:

1. First look introduction of the **Reports** Tab

2. **Reports** tab regions
   - **Tabbed region - Reports**
   - **Reports Current Cutoff Calendar region**
   - **Reports Type Selection region**
   - **Reports Filter – Batch region**
   - **Reports Filter Results – Batch region**

3. Work Instruction for utilizing the **Reports – Batch** functionality

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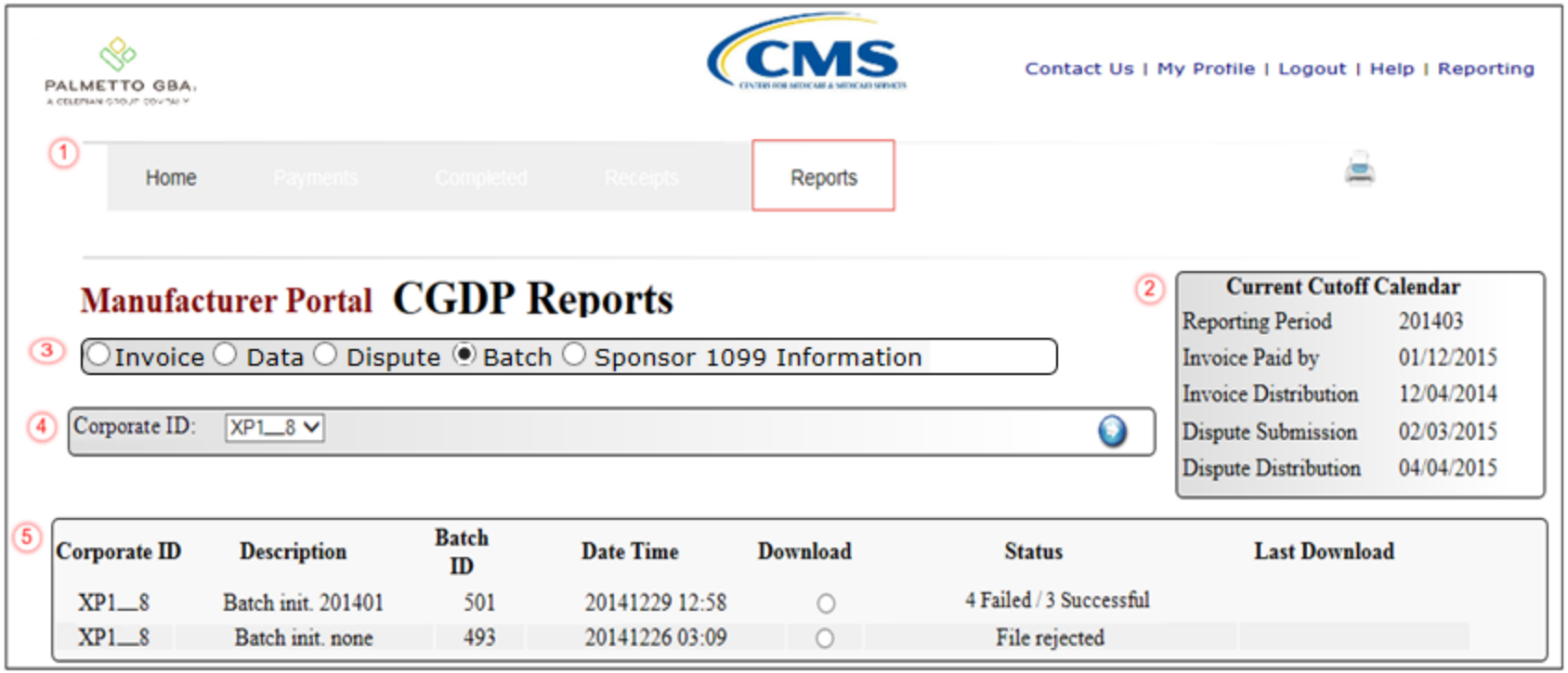
## *Introduction to the Reports – Batch Tab*

# CGDP Portal DPP-Manufacturers
# Reports Tab

The **Reports** tab allows the user to review invoice related reporting data.

This training session will describe each of the five regions displayed on the **Reports** tab and provide direction on the functionality of each. Regions four and five are specific to the **Reports – Batch** functionality.



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***Reports - Batch***

***Tab Regions***

# CGDP Portal DPP-Manufacturers
# Tabbed, Calendar and Report Type Regions

The first three regions of the **Reports** tab are:

The **Tabbed region** allows the user to select different activities to perform while accessing the system. The **Tabbed region – Reports** provides the access to the **Reports** tab to review the different invoice related reporting data.

The **Reports Current Cutoff Calendar region** displays pertinent program dates for the applicable reporting period. The calendar updates each quarter to provide the active reporting period date information.

The **Reports Type Selection region** provides a user with four selections to display or download distributed files and reports. The following slide will describe the five types of report selections available.

In this example, the **Reports** tab is active, the **Reports Current Cutoff Calendar region** displays program dates for the 4th quarter of calendar year 2014 and the **Reports Type Selection region** radio button is populated for Batch reports.

# CGDP Portal DPP-Manufacturers
# Reports Type Selection Region

The **Reports Type Selection region** provides four types of report selections for Manufacturers to utilize.

- Batch reports: provides a user with reports containing uploaded batch file results when using the **Payment Initiation Upload** process. The user is able to view batch file status for successful upload, partial upload or failed batch file uploads and review errors associated with failed records.

- Invoice reports: provides a user with the ability to select and view distributed invoice line item reports. The report provides abbreviated information for distributed invoice line item totals and provides the ability to download the collected information for review. The default selection for the **Report Type Selection region** is Invoice. *Invoice reports will be presented in a separate training session.*

- Data reports: provides a user with reports containing detail information of Prescription Drug Event (PDE) submissions combined to create the total invoice line item amounts distributed to the Manufacturer. *Data reports will be presented in a separate training session.*

- Dispute reports: allows the user to submit disputes and review reports for the status of submitted disputes. *Dispute reports will be presented in a separate training session.*

# CGDP Portal DPP-Manufacturers
# Reports Type Selection Region (continued)

- Sponsor 1099 Information reports: allows the user to view the information formerly collected in the EFT File. *Sponsor1099 Information reports will be presented in a separate training session.*
-

# CGDP Portal DPP-Manufacturers
# Reports Filter – Batch Region

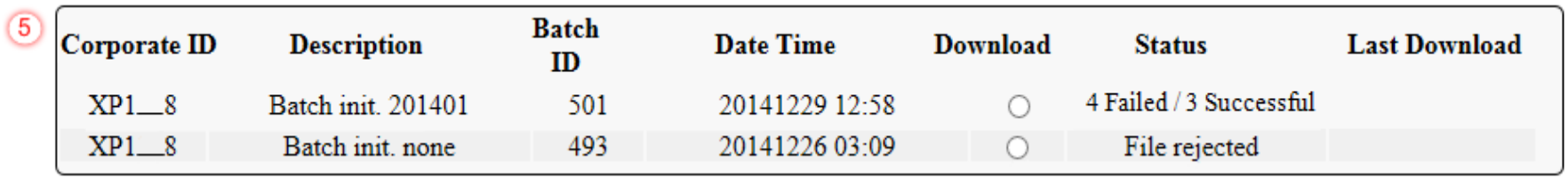
The fourth region of the **Reports** tab, the **Reports Filter – Batch region**, displays when the Batch radio button is selected in the **Reports Type Selection region**.

The **Reports Filter – Batch region** contains one field that provides batch file data uploaded to the system based on the Manufacturer Corporate ID.

- Corporate ID: defaults to the Corporate ID, formerly the Mailbox ID, used to log into the Portal.

# CGDP Portal DPP-Manufacturers
# Reports Filter Results – Batch Region

The fifth and final region of the **Reports** tab, the **Reports Filter Results – Batch region**, displays when the Batch radio button is selected in the **Reports Type Selection region** and provides information on processed batch payment files.




This region contains the following seven fields used to review batched payment files loaded to the Portal.

- Corporate ID: defaults to the Corporate ID, formerly the Mailbox ID, utilized to access the Portal.
- Description: displays the batch file name loaded to the Portal.
- Batch ID: displays the system generated batch number. The numbering convention is based on the order the batch file is received by the Portal.
- Date Time: displays the batch file date and time for files loaded to the Portal. Date format is YYYYMMDD. Time format is HH:MM.
- Download: displays radio button that when selected allows downloading of batch file information loaded to the Portal.
- Status: provides the condition of the batch file loaded to the Portal. Batches can be successful, partially successful (containing line failures) or failed.
- Last Downloaded: displays the last date and time distributed invoice report data retrieved from the Portal. Date format is YYYY/MM/DD. Time format is HH:MM.

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***Reports – Batch***

***Tab Functionality***

***Work Instruction***

# CGDP Portal DPP-Manufacturers
# **Reports – Batch Tab Functionality**

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

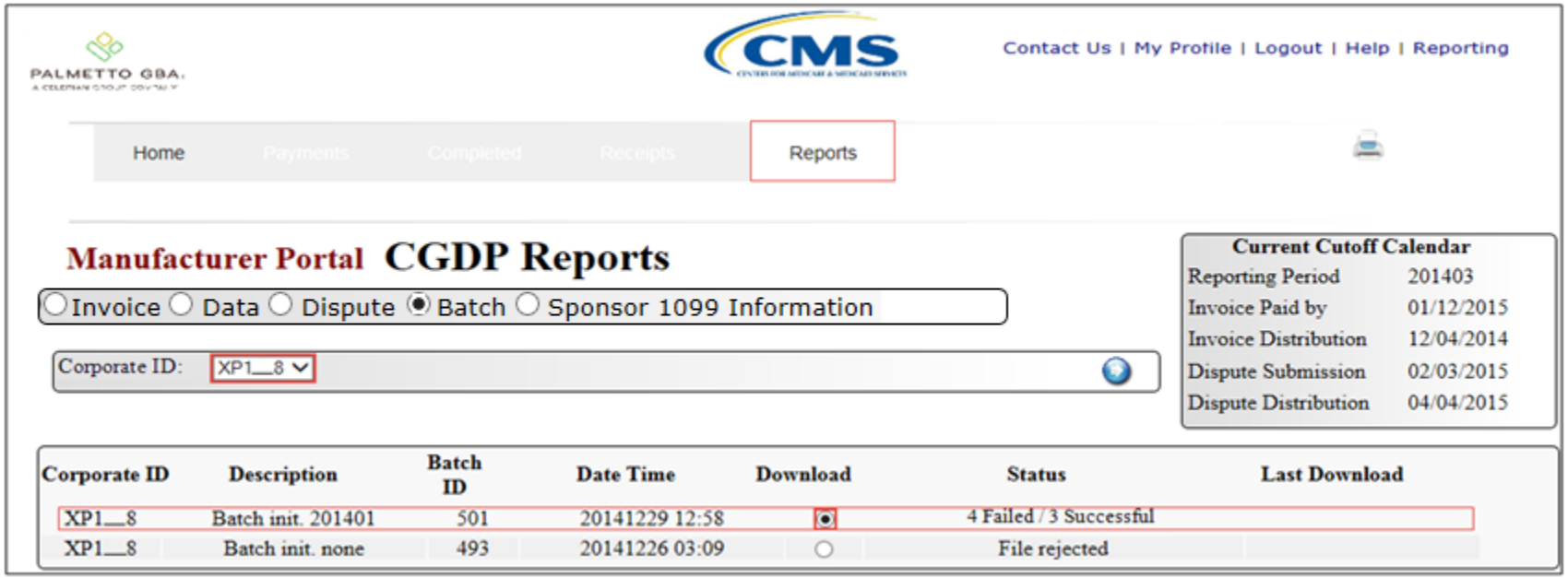
In this section of the training session, a high level overview of the steps needed to utilize the **Reports – Batch** tab functionality will be presented on the following slides.

# CGDP Portal DPP-Manufacturers
# Reports – Batch Tab Functionality

On the **Home** tab, select the **Reports** tab view the report types available for the Manufacturer for the reporting period.

On the **Reports** tab, select the radio button for Batch in the **Reports Type Selection region**, verify the Corporate ID field defaults to the applicable Manufacturer Corporate ID, and select an applicable batch file to download and review.

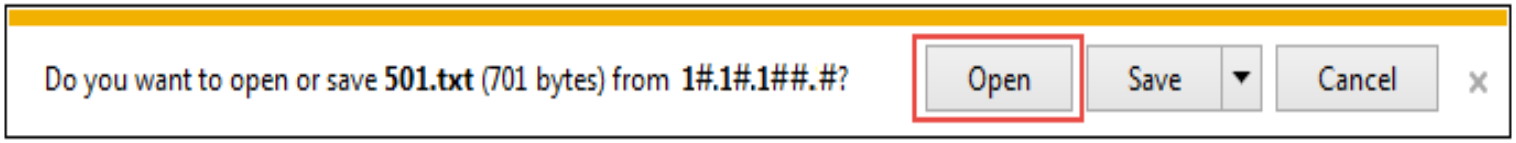
In this example the Batch radio button is populated, the Corporate ID field displays the default selection of XP1__8 and the Download radio button corresponding to the Batch ID of 501 is populated.



# CGDP Portal DPP-Manufacturers
# Reports – Batch Tab Functionality

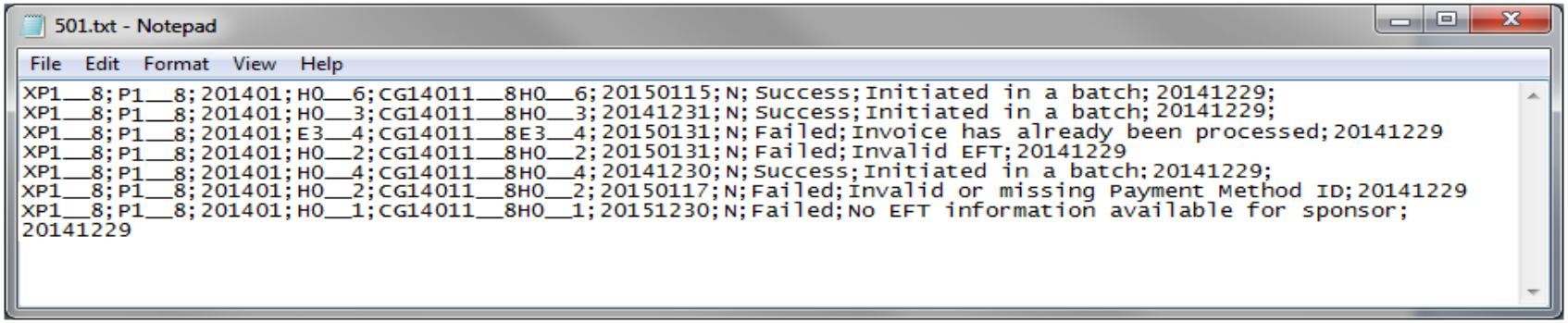
To view the batch file report, select one of the following dialog boxes in the message that appears at the bottom of the screen.

- *Open*: view the data in text file format
- *Save*: save the data in text file format
- *Cancel*: exit the decision message




Selecting the *Open* dialog box will allow a user to view all invoice line items displayed in the batch text file.

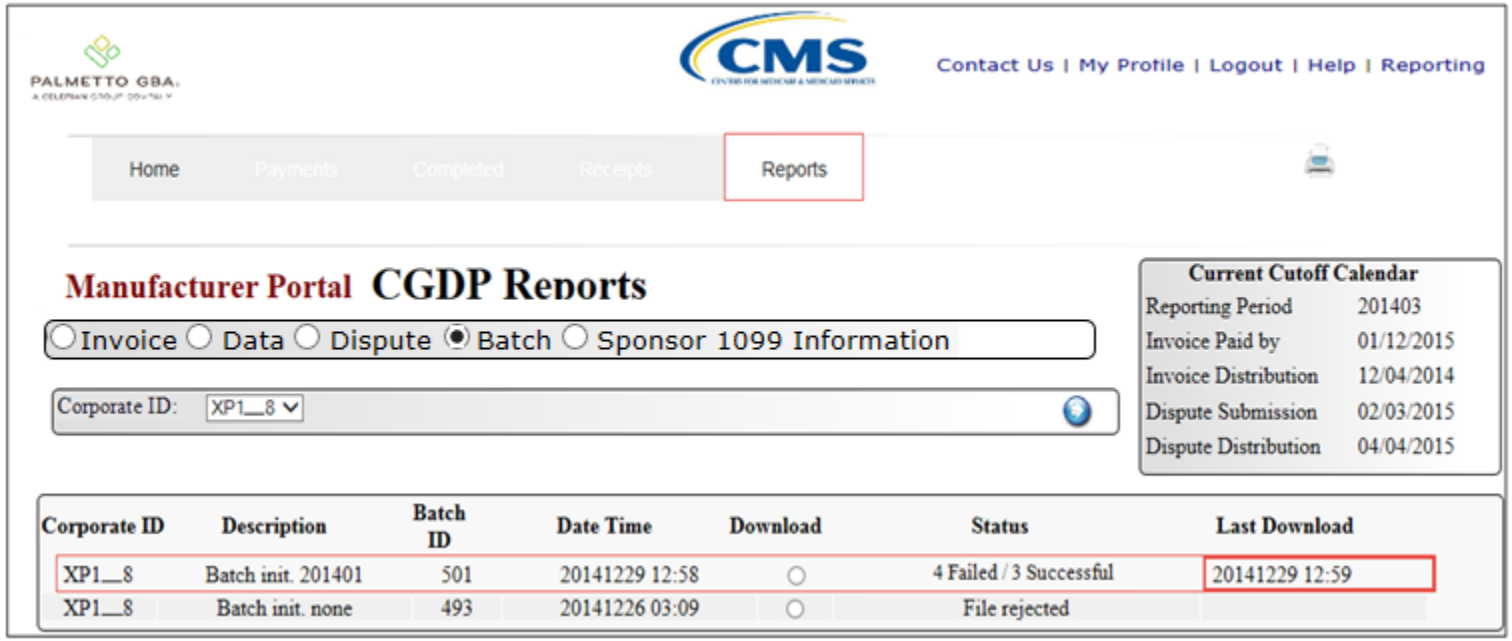
This example displays the downloaded batch text file with seven lines, four of which failed batch processing with error messages listed in the file.



# CGDP Portal DPP-Manufacturers
# Reports – Batch Tab Functionality

The **Reports Filter Results - Batch region** will display the date, in YYYYMMDD format, and time, in HH:MM format, of the last download of the specific batch file item(s) in the Last Download field.

In the following example, the date of 20141229 and the time of 12:59 populate the Last Download field.



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*Training Review*

# CGDP Portal DPP-Manufacturers **–Training Review**

In this training session you have learned about the CGDP Portal DPP-Manufacturers **Reports** tab and the **Reports – Batch** functionality.

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1. First look introduction of the **Reports** Tab

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3. Work Instruction for utilizing the **Reports - Batch** tab functionality

# CGDP Portal DPP-Manufacturers – **Questions**

Questions?