Coverage Gap Discount Program

CMS
CENTERS FOR MEDICARE & MEDICAID SERVICES

PALMETTO GBA
A CELERIAN GROUP COMPANY

CGDP PORTAL DIRECT PAYMENT PROCESS

PALMETTO GBA®
A CELERIAN GROUP COMPANY

Reports – Invoice, Data, Tracking and Manufacturer 1099 Information Tab Functionality

CGDP Portal DPP-Sponsors
Topics

In this training session you will learn about the Coverage Gap Discount Program (CGDP) Portal Direct Payment Process (DPP) – Sponsors **Reports** tab and the **Reports – Summary** 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 – Summary region**
   - **Reports Filter Results – Summary region**

3. Work Instruction for utilizing the **Reports - Summary** functionality

CGDP PORTAL DPP-SPONSORS

PALMETTO GBA®

A CELERIAN GROUP COMPANY

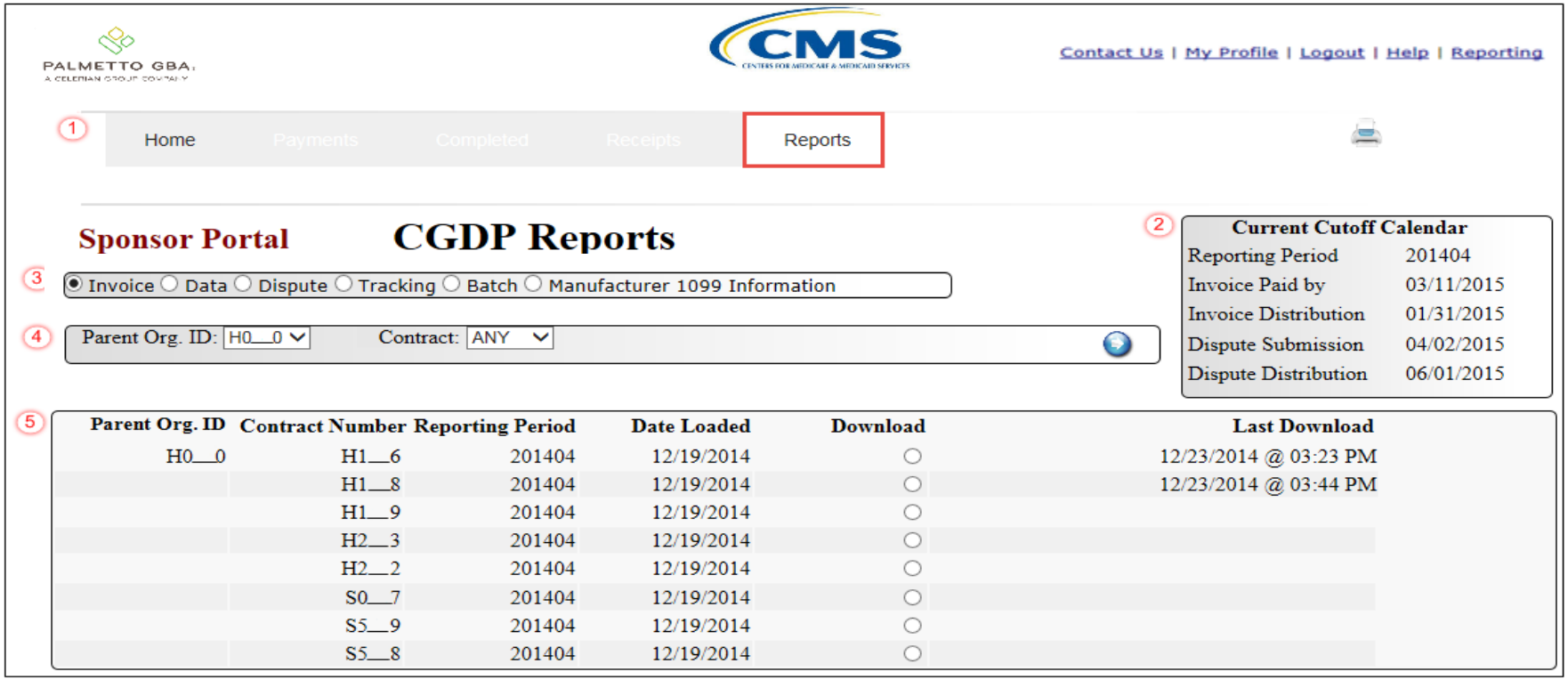
Introduction to the Reports – Summary Tab

CGDP Portal DPP-Sponsors
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 – Summary** functionality.



CGDP PORTAL DPP-SPONSORS

PALMETTO GBA®

A CELERIAN GROUP COMPANY

Reports – Invoice

Tab Regions

CGDP Portal DPP-Sponsors
Tabbed, Calendar and Report Type Regions

The first three regions of the **Reports** tab are the **Tabbed region**, the **Current Cutoff Calendar region** and the **Reports Type Selection region**:

The **Tabbed region – Reports** provides 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.

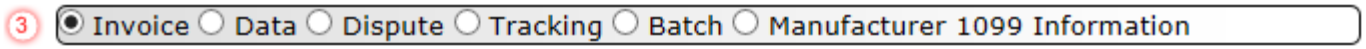
The **Reports Type Selection region** provides a user with five selections to display or download distributed files and reports. The following slides will describe the five types of report selections available.

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

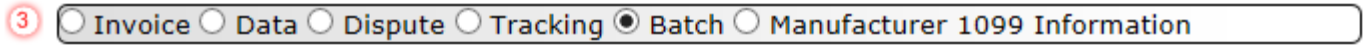
CGDP Portal DPP-Sponsors
Reports Type Selection Region

The third region of the **Reports** tab, the **Reports Type Selection region,** provides six types of report selections for Sponsors to utilize.

The first two types of Reports defined are the Invoice and Batch reports.



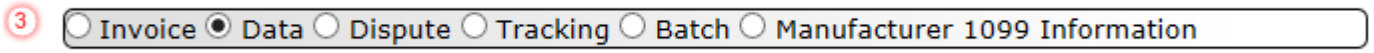
- Invoice reports: allows the user to select and view distributed invoice line item summary reports. The report provides abbreviated summary information for distributed invoice line item totals and allows the user to download the collected information for review.
  - The default selection for the **Report Type Selection region** is Invoice.



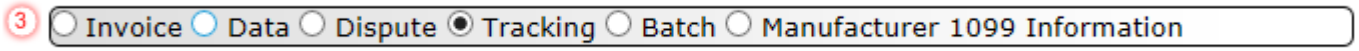
- Batch reports: provides the user with reports containing uploaded batch file results when utilizing the **Payment Initiation Upload** process. The user is able to view batch file status for successful upload, partial upload or failed batch file uploads and review errors associated with failed records.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

CGDP Portal DPP-Sponsors
Reports Type Selection Region (continued)

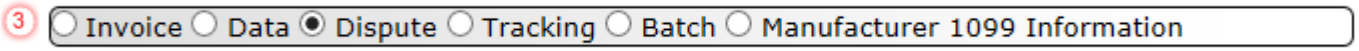
The final four **Reports Type Selection region** reports defined are Data, Tracking, Dispute and Manufacturer 1099 Information reports.



- Data reports: provides the user with reports containing detail information of the PDE's combined to create the total invoice line item amounts distributed to the Sponsor.



- Tracking reports: allows the user to view the cumulative benefit year reports that provide the status of each Gap Discount PDE saved in the CMS database.



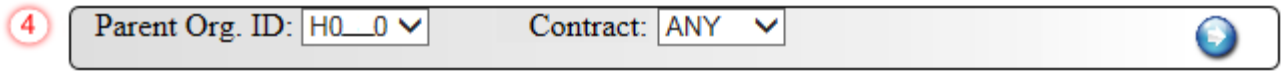
- Dispute reports: allows the user to submit disputes and review reports for the status of submitted disputes.

- Manufacturer 1099 Information reports: allows the user to view the 1099 information formerly collected in the EFT File.

CGDP Portal DPP-Sponsors
Reports Filter – Summary Region

The fourth region of the **Reports** tab, the **Reports Filter – Summary region**, displays when the Invoice, Data, Dispute or Tracking radio button is selected in the **Reports Type Selection region**.

The **Reports Filter – Summary region** contains the following two fields to assist with narrowing distributed invoice search criteria.

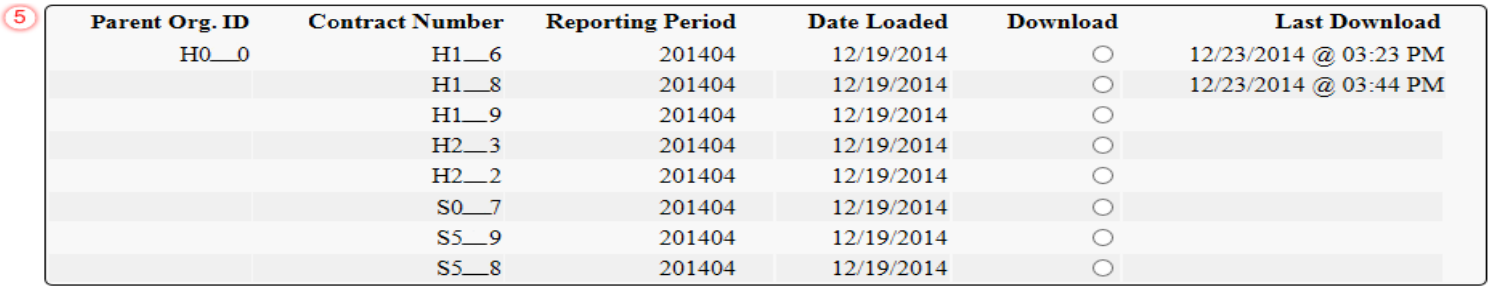


- Parent Org. ID: defaults to the Parent Organization ID utilized to access the Portal.
- Contract: displays the Contract Number for distributed invoices. The drop down list provides update capability to select another Contract Number from those assigned to the Parent Organization ID.

In the example the Parent Org. ID field displays the default Parent Organization ID used to access the Portal and the Contract field displays the default of 'ANY'.

CGDP Portal DPP-Sponsors
Reports Filter Results – Summary Region

The fifth and final region of the **Reports** tab, the **Reports Filter Results – Summary region**, displays when the Invoice radio button is selected. This region provides information on summary reports based on selections made in the **Reports Filter – Summary** region.



Parent Org. ID	Contract Number	Reporting Period	Date Loaded	Download	Last Download
H0__0	H1__6	201404	12/19/2014	○	12/23/2014 @ 03:23 PM
	H1__8	201404	12/19/2014	○	12/23/2014 @ 03:44 PM
	H1__9	201404	12/19/2014	○	
	H2__3	201404	12/19/2014	○	
	H2__2	201404	12/19/2014	○	
	S0__7	201404	12/19/2014	○	
	S5__9	201404	12/19/2014	○	
	S5__8	201404	12/19/2014	○	

This region contains the following six fields used to review information of distributed invoices and allows the user to download the summary information for review.

- Parent Org ID: defaults to the Parent Organization ID utilized to access the Portal.
- Contract Number: displays a specific Sponsor Contract Number or all Sponsor Contract Numbers associated with the Parent Organization ID.
- Reporting Period: displays the distributed invoice information by reporting period in YYYYQQ format.
- Date Loaded: displays the invoice distribution date. This date corresponds to the end of month following reporting period closing. Date format is DD/MM/YYYY.
- Download: displays radio button to allow downloading of distributed invoice information loaded to the system.
- 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.

CGDP PORTAL DPP-SPONSORS

PALMETTO GBA®

A CELERIAN GROUP COMPANY

Reports – Summary Tab Work Instruction

CGDP Portal DPP-Sponsors
Reports – Summary Work Instruction

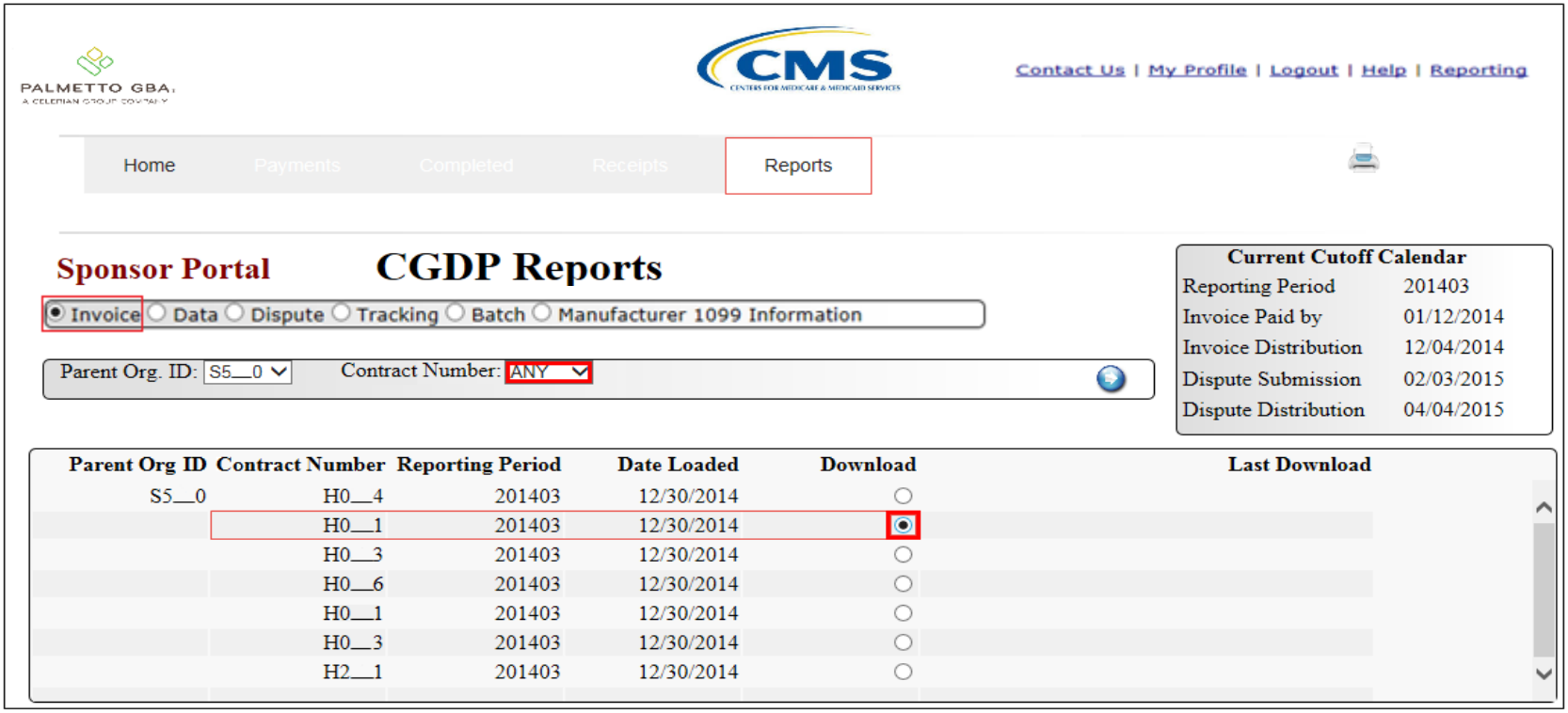
You have now learned about the different regions and fields available on the **Reports** tab.

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

CGDP Portal DPP-Sponsors
Reports – Summary Work Instruction
Select Reporting Period

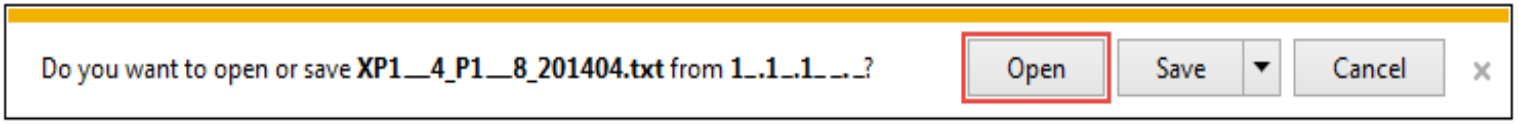
On the **Reports** tab verify the Invoice radio button in the **Reports Type Selection region** is populated. Select the applicable Contract Number from the drop down list located in the **Reports – Summary Filter region** and populate the Download radio button in the **Reports Filter Results – Summary region** to review a specific reporting period.

In the following example, the Invoice radio button is populated, the Contract Number field drop down listing displays the selection of 'ANY' and the Download radio button corresponding to Contract Number H0__1 is populated.



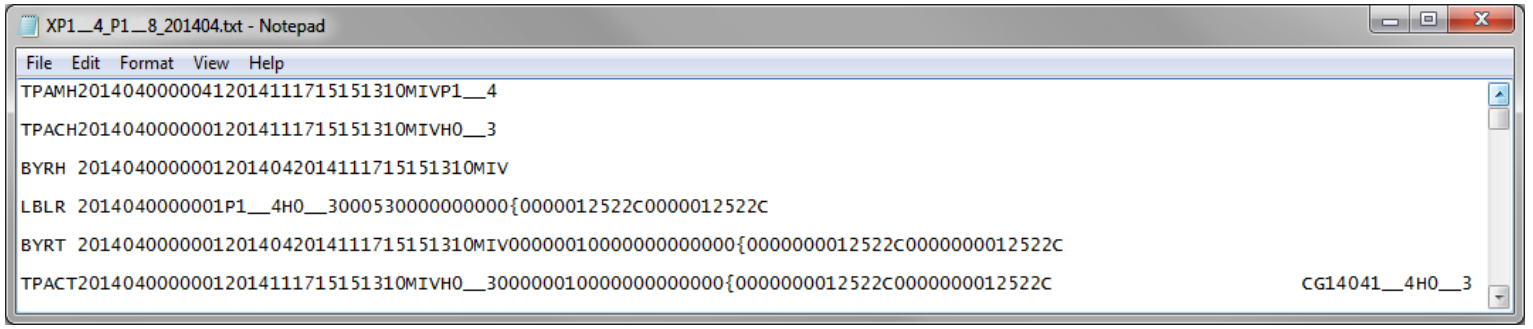
CGDP Portal DPP-Sponsors
Reports – Summary Work Instruction
Open and Review Summary Files

To view the distributed invoice line item 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

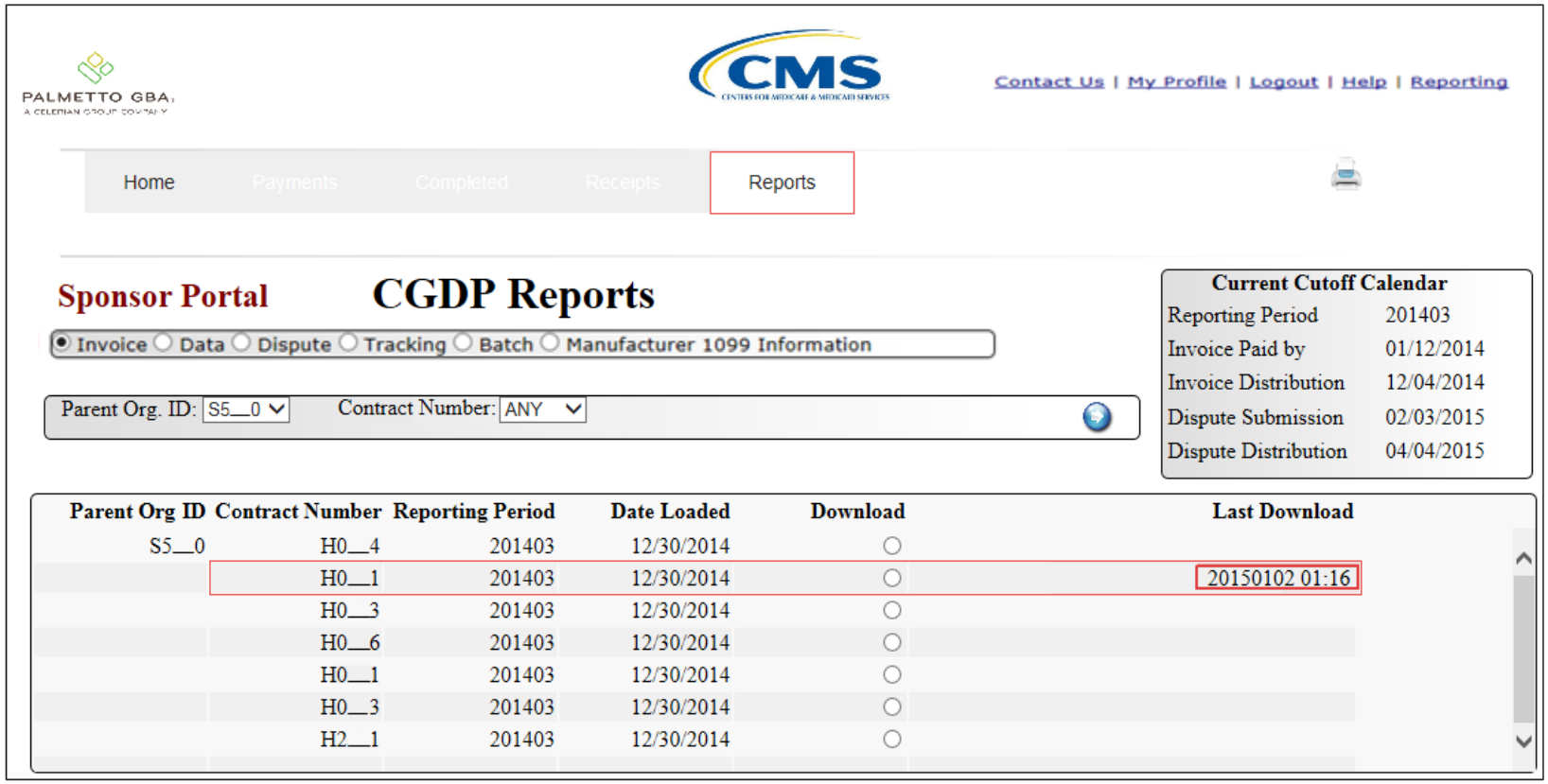
Selecting the *Open* button will display the distributed invoice information in a text file format. The following example displays an excerpt of an invoice line item text file.



CGDP Portal DPP-Sponsors
Reports – Summary Work Instruction
Summary Report Last Download

The **Reports Filter Results** – **Summary region** will display the date, in YYYYMMDD format, and time, in HH:MM format, of the last download of the specific invoice line item(s) in the Last Download field.

In the following example, the date of 20150102 and the time of 01:16 populates the Last Download field.

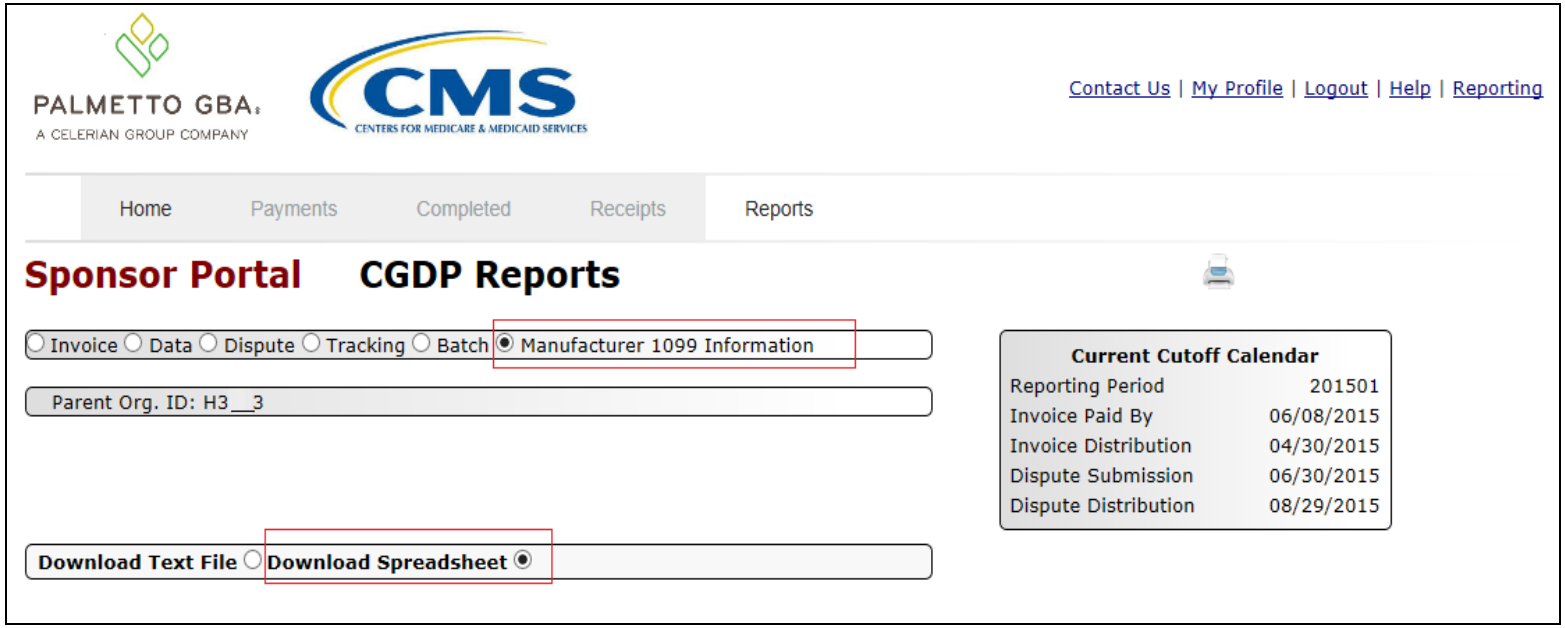


CGDP Portal DPP-Sponsors

Reports– Manufacturers1099 Information Tab Functionality

- Sponsors are able to utilize the Manufacturer 1099 Information Reports functionality to view 1099 information formerly collected on the EFT file

- In the following example, the Manufacturer 1099 Information radio button is populated, the Corporate ID field drop down list displays XP1_4 the selection of Download Spreadsheet is populated.



CGDP Portal DPP-Sponsors

Reports– Manufacturers1099 Information Tab Functionality

- To view the EFT related information 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 display the distributed invoice information in a text file format.

This example displays an excerpt of the Manufacturer 1099 Information Report spreadsheet file.

P Number	Drug Manufacturer Name	EIN	IRS Name	IRS Street Address 1	IRS Street Address 2	IRS City	IRS State	IRS Zip	For Future Use
P****	Drug Manufacturer Name	111111111	Manufacturer IRS Name	0000 Interpace Pkwy	Building A	Ireland	NJ	07054	
P****	Drug Manufacturer Name	222222222	Manufacturer IRS Name	345 Park Street		Dakota	NY	10154	
P****	Drug Manufacturer Name	333333333	Manufacturer IRS Name	1 Camden Road		Sweet	IL	60064	

CGDP PORTAL DPP-SPONSORS

PALMETTO GBA®

A CELERIAN GROUP COMPANY

Training Review

CGDP Portal DPP-Sponsors
Training Review

In this training session you have learned about the CGDP Portal DPP – Sponsors **Reports** tab and the **Reports – Summary** functionality.

This training introduced 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 – Summary region**
   - **Reports Filter Results – Summary region**

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

CGDP Portal DPP-Sponsors
Questions

Questions?