

Coverage Gap Discount Program



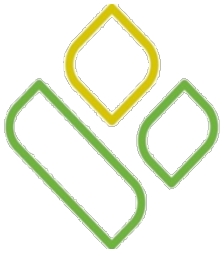
CGDP PORTAL DIRECT PAYMENT PROCESS



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*Accessing and Navigating the
CGDP Portal Direct Payment Process-
Sponsors*



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.

This training will introduce you to the following topics:

1. Introduction of the new CGDP Portal DPP
2. Access to the new CGDP Portal DPP
3. Learning to navigate through the new CGDP Portal DPP
4. Common Icons and Links available throughout the new CGDP Portal DPP

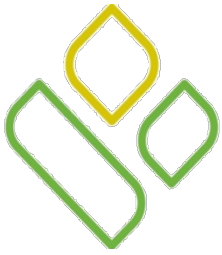
CGDP PORTAL DPP- SPONSORS



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*Introducing the
Direct Payment Process*



CGDP Portal DPP-Sponsors Introduction

The CGDP Portal DPP portal is designed to assist Sponsors with processing CGDP payments to Manufacturers. This system allows Sponsors to review invoice line items and initiate bank-to-bank Automated Clearing House (ACH) transfers for invoice line item payments due back to the Manufacturer, similar to the way an online banking customer pays a monthly bill.

The CGDP Portal DPP will provide functionality for the following:

- Invoice review
- Invoice payment deferment
- Automatic payment confirmation
- Invoice dispute filing
- Invoice payment selection
- Batch Invoice payment selection
- Payment receipt review
- Reports retrieval

The CGDP Portal DPP will become the active system starting with the 2015 Q2 reporting period. Quarter 2 2015 invoices, which will be distributed on August 31, 2015

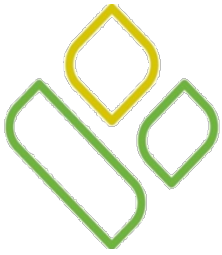
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*Accessing the
Direct Payment Process*



CGDP Portal DPP-Sponsors Login

The information entered into the CGDP Portal Login page is the Sponsor credential information currently used to access the CGDP TPA Mailbox.

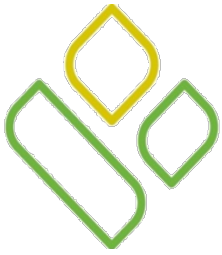
 

Coverage Gap Discount Program

User Id:



Password:

Once complete, select the Login button to continue to the Home page.



CGDP Portal DPP-Sponsors Login

- There has been an additional level of security added to the Portal. All users will be required to answer security questions when logging on for the first time. Additionally, users with Payment Initiation privileges will also need to enter a PIN when signing on.

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Coverage Gap Discount Program

Security Data Missing

Due to system security requirements your account will need to be updated with the information below. Please complete the form to proceed.

Enter PIN:

Retype PIN:

Question # 1:

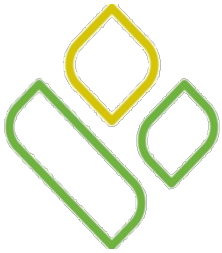
Answer # 1:

Question # 2:

Answer # 2:


Question # 3:

Answer # 3:




CGDP Portal DPP-Sponsors Login

- For each subsequent sign on, one of the chosen security questions will be randomly chosen.



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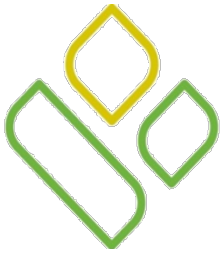
Coverage Gap Discount Program

User Validation

Due to system security requirements you will need to answer the question below to gain access to the application.

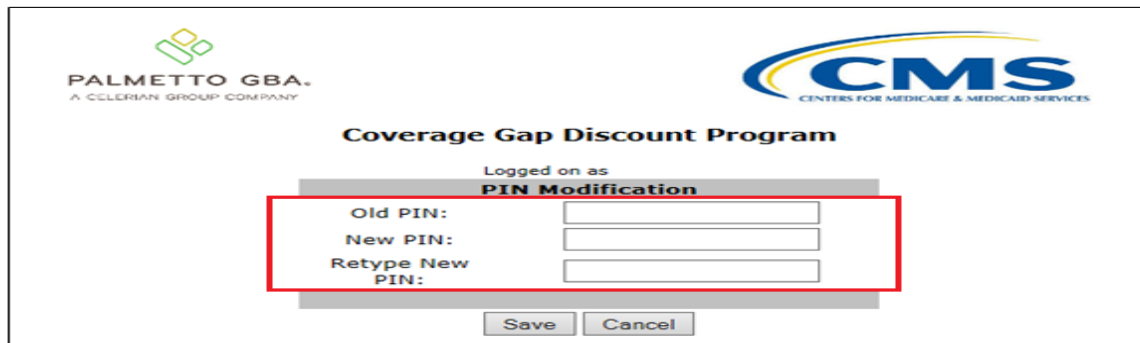
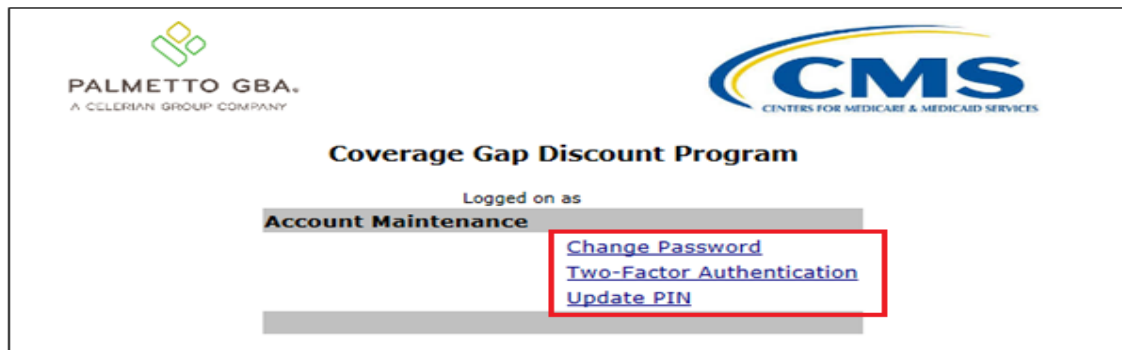
What primary school did you attend?

Answer:



CGDP Portal DPP-Sponsors Login

- The option is also available for the user to change their security information through the functions located under the *My Profile* link.



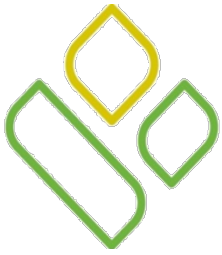
*CGDP PORTAL DPP-
SPONSOR*



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*Navigating the
Direct Payment Process*



CGDP Portal DPP-Sponsors

Navigation: Home Tab

Tabbed Region

The **Home** tab allows Sponsors to access all areas of the CGDP Portal DPP system and begin research to review and work with distributed invoices.

Once login access is granted and completed, the **Home** tab will appear.

The screenshot displays the user interface of the Coverage Gap Discount Program (CGDP) Portal. At the top left is the Palmetto GBA logo, and at the top center is the CMS logo. A navigation bar contains five tabs: Home, Payments, Completed, Receipts, and Reports. The Home tab is highlighted with a red border. To the right of the navigation bar are links for Contact Us, My Profile, Logout, Help, and Reporting, along with a printer icon. Below the navigation bar, the page title reads "Sponsor Portal Coverage Gap Discount Program". A search filter section includes dropdown menus for Parent Org. ID (S####), Contract Number (H####), Reporting Period (ANY), and Status (ANY), with a search button. Below this is a table with columns for Parent Org. ID, Contract Number, Reporting Period, Status, and a Select column. The table contains three rows of data, all with a status of "Available". To the right of the table are two informational boxes. The top box welcomes users and explains the portal's functions. The bottom box provides a legend for the status values: Available, Failed, Incomplete, Pending, and Successful.

Parent Org. ID: S#### **Contract Number:** H#### **Reporting Period:** ANY **Status:** ANY

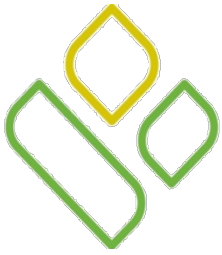
<u>Parent Org. ID</u>	<u>Contract Number</u>	<u>Reporting Period</u>	<u>Status</u>	<u>Select</u>
S####	H####	201401	Available	<input type="radio"/>
S####	H####	201402	Available	<input type="radio"/>
S####	H####	201403	Available	<input type="radio"/>

Welcome to Coverage Gap Discount Portal where you can initiate a payment, check the status of payments and receipt of payments as well as view your reports.

For payment functions, start by selecting a line item from the list to the left of this message.

Available - Invoice is ready for payment initiations
Failed - One or more items has an unsuccessful payment attempt
Incomplete - One or more items have not been paid
Pending - All line items have been initiated successfully
Successful - All line items have been paid successfully



The available tabs appearing on the page are the **Home** tab and the **Reports** tab.



CGDP Portal DPP-Sponsors Navigation: Home Tab Tabbed Region – All Tabs


To access all available functions of the Direct Payment Portal, selection of a distributed invoice must be performed.

In the example presented, a distributed invoice line for the reporting period of 201403 has been selected by populating the radio button in the Select column. This action activates the **Payments** tab, **Completed** tab and **Receipts** tab, as well as keeping the **Home** tab and **Reports** tab available for selection.

[Contact Us](#) | [My Profile](#) | [Logout](#) | [Help](#) | [Reporting](#)

[Home](#) | [Payments](#) | [Completed](#) | [Receipts](#) | [Reports](#)

Sponsor Portal Coverage Gap Discount Program

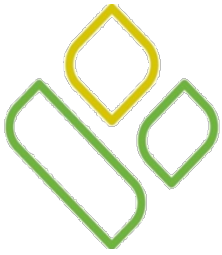
Parent Org. ID:	Contract Number	Reporting Period:	Status:	
S#### ▾	H#### ▾	ANY ▾	ANY ▾	

Parent Org. ID	Contract Number	Reporting Period	Status	Select
S####	H####	201401	Available	<input type="radio"/>
S####	H####	201402	Available	<input type="radio"/>
S####	H####	201403	Available	<input checked="" type="radio"/>

Welcome to Coverage Gap Discount Portal where you can initiate a payment, check the status of payments and receipt of payments as well as view your reports.

For payment functions, start by selecting a line item from the list to the left of this message.



Available - Invoice is ready for payment initiations
Failed - One or more items has an unsuccessful payment attempt
Incomplete - One or more items have not been paid
Pending - All line items have been initiated successfully
Successful - All line items have been paid successfully



CGDP Portal DPP-Sponsors Navigation: Payments Tab


Selecting the **Payments** tab allows the user to review and process payment information for invoice line items by Manufacturer P Number.

On this tab, Sponsors can process invoice line item payment initiations, defer invoice line item payments, create batch payment initiation text files and process stop payments.






[Contact Us](#) | [My Profile](#) | [Logout](#) | [Help](#) | [Reporting](#)



[Home](#) | **Payments** | [Completed](#) | [Receipts](#) | [Reports](#)


Sponsor Portal **CGDP Payments** Invoiced Reporting Period: 201403

P Number: ANY Parent Org. ID: S#### Contract Number: H#### 

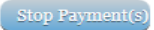
Initiate All

P Number	Invoiced Amt.	Previous Deferred Amount	Payment Date	Initiate Payment	Defer	Failed
P####	284.54	0.00	01/08/2015 	<input type="checkbox"/>	<input type="checkbox"/>	
P####	691.19	0.00	01/08/2015 	<input type="checkbox"/>	<input type="checkbox"/>	
P####	23.69	0.00	01/08/2015 	<input type="checkbox"/>	<input type="checkbox"/>	
P####	2.50	0.00	01/08/2015 	<input type="checkbox"/>	<input type="checkbox"/>	
P####	96.41	0.00	01/08/2015 	<input type="checkbox"/>	<input type="checkbox"/>	

Update All 01/08/2015  

Pending Transactions 

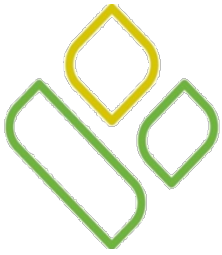
P Number	Authorization Amt.	Date Submitted	Payment Date	Stop Payment
No data				



Payments due 1/12/2015

<u>Payment Information</u>	
Total Invoiced	1980.57
Total Failed	0.00
Total Deferred	0.00
Total Pending	0.00
Total Successful	0.00
Total Available	1980.57

Payment Initiation Upload




CGDP Portal DPP-Sponsors


Navigation: Completed Payments Tab

Selecting the **Completed** tab allows the user to review completed payment information for invoice line items by Manufacturer P Number.

On this tab Sponsors can review the status of completed payment processing for initiated or deferred payments.



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Home | Payments | **Completed** | Receipts | Reports

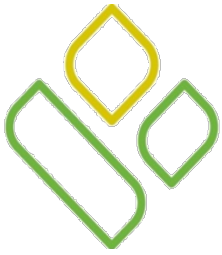
Sponsor Portal **CGDP Completed Payments** Invoiced Reporting Period: 201403

Parent Org. ID: S#### Contract: H#### ▾ P number: ANY ▾

P Number	Invoiced Amt.	Payment Date	EFTID
P####	2.50	Deferred	CG1403####H####

Payment Information	
Total Invoiced	1980.57
Total Pending	0.00
Total Deferred	2.50
Total Failed	0.00
Total Successful	0.00
Total Outstanding	1978.07



To view completed payments for a different reporting period, return to the Home tab and select the radio button line item that contains the desired reporting period



CGDP Portal DPP-Sponsors Navigation: Receipts Tab

Selecting the **Receipts** tab allows the user to review invoice line item receipt information for distributed invoice line items due from the Manufacturer by P Number.

On this tab Sponsors can review the status of payments due from Manufacturers.

[Contact Us](#) | [My Profile](#) | [Logout](#) | [Help](#) | [Reporting](#)

[Home](#) | [Payments](#) | [Completed](#) | **[Receipts](#)** | [Reports](#)

Sponsor Portal

CGDP Receipt Status

Invoiced Reporting Period: 201403

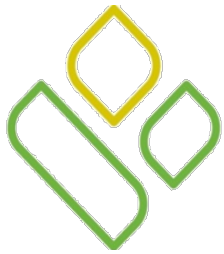
P Number: ANY ▼ Parent Org. ID: S#### Contract Number: H#### ▼

P Number	Invoiced Amt.	Payment Date	EFTID	Status
P####	613.10	12/30/2014	CG14011__0H3__9	Received
P####	171.59			Outstanding
P####	2.86	12/30/2014	CG14011__2H3__9	Deferred

Payment Information

Total Owed	787.55
Total Deferred	2.86
Total Received	613.10
Total Outstanding	171.59

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-Sponsors Navigation: Reports Tab

Selecting the **Reports** tab allows the user to review or submit six types of invoice reports.

On this tab, Sponsors can select one of six report views which allow the review of the Invoice reports, Data detail reports, Tracking detail reports, submission and review of Dispute requests, review of successful or failed Batch upload files and review Manufacturer 1099 information.


In this example, the **Reports** tab defaults to Invoice reports.

[Contact Us](#) | [My Profile](#) | [Logout](#) | [Help](#) | [Reporting](#)

Home Payments Completed Receipts **Reports** 

Sponsor Portal **CGDP Reports**

Invoice Data Dispute Tracking Batch Manufacturer 1099 Information

Parent Org. ID: Contract: 

Current Cutoff Calendar

Reporting Period	201404
Invoice Paid by	03/11/2015
Invoice Distribution	01/31/2015
Dispute Submission	04/02/2015
Dispute Distribution	06/01/2015

Parent Org. ID	Sponsor	Reporting Period	Date Loaded	Download	Last Download
H0__0	H1__6	201404	12/19/2014	<input type="radio"/>	12/23/2014 @ 03:23 PM
	H1__8	201404	12/19/2014	<input type="radio"/>	12/23/2014 @ 03:44 PM
	H1__9	201404	12/19/2014	<input type="radio"/>	
	H2__3	201404	12/19/2014	<input type="radio"/>	
	H2__2	201404	12/19/2014	<input type="radio"/>	
	S0__7	201404	12/19/2014	<input type="radio"/>	
	S5__9	201404	12/19/2014	<input type="radio"/>	
	S5__8	201404	12/19/2014	<input type="radio"/>	

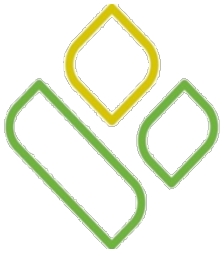
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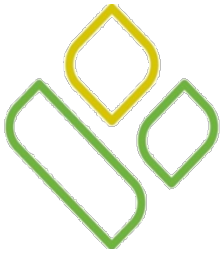
Icons and Links



CGDP Portal DPP-Sponsors Portal Icons and Links

There are recurring icons and links throughout the CGDP Portal DPP that appear on the functional tabs in the system.

ICON/LINK	Definition
	<u>Calendar</u> icon provides an expanded calendar that allows users to select future months and dates.
Contact Us	<u>Contact Us</u> link provides contact information for the TPA Operations Team
Help	<u>Help</u> link provides access to system error codes and descriptions generated during the payment initiation process
Logout	<u>Logout</u> link provides one-click access for logging out of the Web Portal DPP system
My Profile	<u>My Profile</u> link provides the ability to enter and review business contact profiles
	<u>Next Page</u> icon provides access to move forward to next page in document
	<u>Prior Page</u> icon provides access to return to prior page in document, when available
	<u>Printer</u> icon provides users with displayed information formatted in a Microsoft Excel file.



CGDP Portal DPP-Sponsors Icons and Links Locations

In this example, the Calendar, Next Page, Prior Page and Printer icons and Contact Us, My Profile, Logout and Help links are displayed on the **Payments** tab.

The screenshot shows the CMS Palmetto GBA portal. The 'Payments' tab is selected and highlighted with a red box. In the top right corner, navigation links for 'Contact Us', 'My Profile', 'Logout', 'Help', and 'Reporting' are shown with red arrows pointing to them. Below the navigation bar, a printer icon is also highlighted with a red arrow. The main content area is titled 'Sponsor Portal CGDP Payments' and includes a search bar with fields for P Number (P1_4), Parent Org. ID (H0_0), and Contract Number (H5_9). Two blue circular icons with arrows are highlighted with red arrows. Below the search bar is a table of payment transactions. The first row shows a payment for P1_4 with an amount of 71.79 and a payment date of 12/22/2014. A red arrow points to the date field. Below the table is a 'Submit' button. To the right of the table is a 'Payment Information' summary box showing totals for Invoiced, Failed, Deferred, Pending, Successful, and Available amounts. At the bottom left, there is a 'Pending Transactions' section with a table that currently has no data. At the bottom right, there is a 'Payment Initiation Upload' section with a 'Browse...' button and an 'Upload' button. A 'Stop Payment(s)' button is located at the bottom center of the page.

Navigation Links: [Contact Us](#) | [My Profile](#) | [Logout](#) | [Help](#) | [Reporting](#)

Search Fields: P Number: P1_4 | Parent Org. ID: H0_0 | Contract Number: H5_9

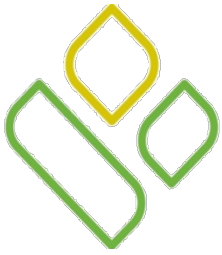
Payment Information Summary:

Payment Information	
Total Invoiced	71.79
Total Failed	0.00
Total Deferred	0.00
Total Pending	0.00
Total Successful	0.00
Total Available	71.79

Pending Transactions Table:

P Number	Authorization Amt.	Date Submitted	Payment Date	Stop Payment
No data				

Payment Initiation Upload:




CGDP Portal DPP-Sponsors Icons

Examples of the Calendar icon, Next Page icon, Prior Page icon and Printer icon are listed below:

The Calendar icon expands to allow the user to select future dates for processing:

Payment Date


12/31/2014 

January 2015



Sun	Mon	Tue	Wed	Thu	Fri	Sat
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31


Go To Today **Close**

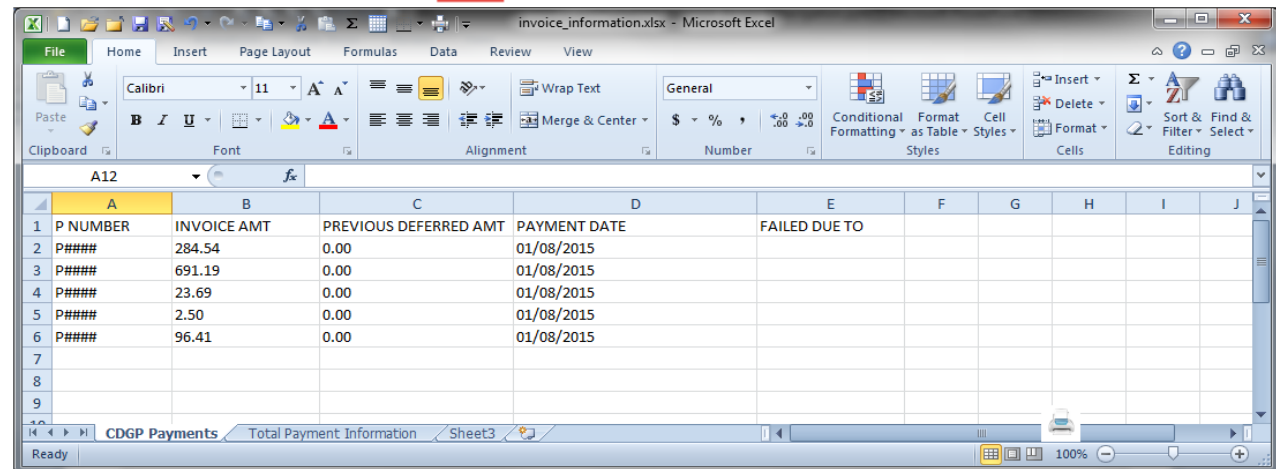
The Next Page icon allows the user to move to the next page of data:

P Number: ANY Parent Org. ID: S##### Contract Number: H##### 

The Prior Page icon allows the user to return to the former page of data, when available:

P Number: ANY Parent Org. ID: S##### Contract Number: H#####  

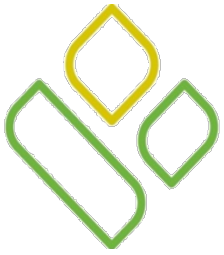
The Printer icon allows the user to view the data visible on the screen in Microsoft Excel format: 



invoice_information.xlsx - Microsoft Excel

	A	B	C	D	E	F	G	H	I	J
1	P NUMBER	INVOICE AMT	PREVIOUS DEFERRED AMT	PAYMENT DATE	FAILED DUE TO					
2	P####	284.54	0.00	01/08/2015						
3	P####	691.19	0.00	01/08/2015						
4	P####	23.69	0.00	01/08/2015						
5	P####	2.50	0.00	01/08/2015						
6	P####	96.41	0.00	01/08/2015						
7										
8										
9										

CDGP Payments Total Payment Information Sheet3



CGDP Portal DPP-Sponsors Links

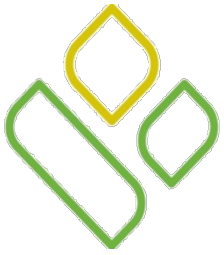
Examples of the Contact Us link and the My Profile link are listed below:

The Contact Us link provides contact information for the TPA Operations:

The screenshot shows the 'Contact Us' page. On the left is the Palmetto GBA logo with the text 'PALMETTO GBA, A CELEBRITY GROUP COMPANY'. On the right is the CMS logo with the text 'CENTERS FOR MEDICARE & MEDICAID SERVICES'. The main heading is 'Contact Us'. Below it, the text reads: 'For any questions regarding the use of the Portal, please call TPA Operations at 1-877-534-2772 and select Option 1, or email at tpaoperations@tpadministrator.com'.

The My Profile link allows users to update their password, PIN and security questions

The screenshot shows the 'Coverage Gap Discount Program' user interface. At the top, it says 'Logged on as XP:—00'. Below this is a grey bar with the text 'Account Maintenance'. Underneath are three blue hyperlinks: 'Change Password', 'Two-Factor Authentication', and 'Update PIN'. At the bottom is another grey bar.



CGDP Portal DPP-Sponsors Links (continued)

Examples of the Logout link and the Help link are listed below:

The Logout link provides a one-click exit from the Portal to the Login screen.

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CMS CENTERS FOR MEDICARE & MEDICAID SERVICES

Coverage Gap Discount Program

User Id:

Password:

Login

The Help link directs the user to the TPA Operations websites New Direct Payment Process Information section.

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CMS CENTERS FOR MEDICARE & MEDICAID SERVICES

HOME CONTACT US ARCHIVES MANAGE LISTSERV PROFILE Search

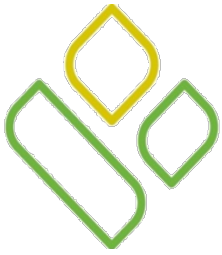
Coverage Gap Discount Program

Third Party Administrator / TPA Drug Manufacturer / New Direct Payment Process...

TPA Drug Manufacturer

New Direct Payment Process Information

Direct Payment Process FAQs	08/14/2015
HPMS Memo: Payment of Outstanding Coverage Gap Discount Program payments	07/15/2015
1099 Record Layouts	05/11/2015
Dispute Response Report Spreadsheet Download Instructions	05/11/2015
Manufacturer Portal Direct Payment Process (DPP) Users Guide	05/06/2015
Sponsor Portal Direct Payment Process (DPP) Users Guide	05/06/2015
CGDP Portal	04/20/2015
HPMS Memo: Updates on the new Medicare Part D Coverage Gap Discount Program Direct Payment Process	03/26/2015



CGDP Portal DPP-Sponsors Links (continued)

- The Reporting link provides a readable version of the data/detail report in Microsoft Excel.

Coverage Gap Discount Program
Invoice Line Item Reporting

Select which items you want to display on the report (Invoice Line Item Report Only)

Parent Org. ID Contract Number P Number Status
 Reporting Period Invoice Amount Payment Status Date

Reporting Filters (Invoice Line Item Report Only)

Select Contract Number: E__30
Select P Number:
Select By Status of Invoices:
Reporting Period: 201501

[Run Query for Detailed Report](#)

Sponsor Summary Report

Summary Report for Contract Number:
Reporting Period:
Sponsor Status:

[Run Sponsor Summary Query](#)

Do you want to open or save E__30_detailed_report.xlsx from a7003.a70adecom? Open Save Cancel

PARENT ORG. ID	CONTRACT	P NUMBER	INVOICE AMOUNT	REPORTING PERIOD	STATUS DATE	STATUS DESCRIPTION
E_30	E_30	P_33	.01	201501	07/22/2015	Unpaid
E_30	E_30	P_62	.01	201501	07/22/2015	Unpaid
E_30	E_30	P_26	.01	201501	07/22/2015	Unpaid

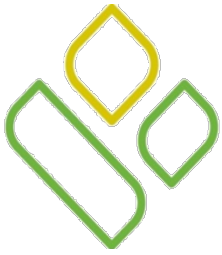
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Training Review

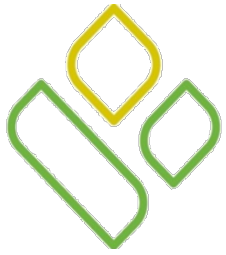


CGDP Portal DPP-Sponsors Training Review

In this training session you have learned about the CGDP Portal DPP – Sponsors.

This training introduced you to the following topics:

1. Introduction of the new CGDP Portal DPP-Sponsors.
2. Access to the CGDP Portal DPP-Sponsors
3. Learning to navigate through the CGDP Portal DPP-Sponsors
4. Common Icons and Links available throughout the CGDP Portal DPP-Sponsors



CGDP Portal DPP-Sponsors Questions

Questions?

