

Coverage Gap Discount Program



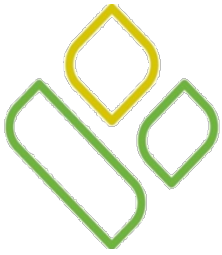
CGDP PORTAL DIRECT PAYMENT PROCESS



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*Completed
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 **Completed** tab.

This training will introduce you to the following topics:

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

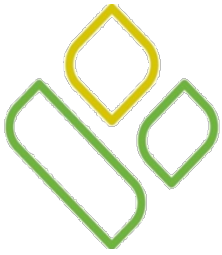
CGDP PORTAL DPP- SPONSORS



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*Introduction to the
Completed Tab*



CGDP Portal DPP-Sponsors Completed Tab

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

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

The screenshot shows the 'Completed' tab selected in the navigation menu. The page title is 'Sponsor Portal CGDP Completed Payments' with an 'Invoiced Reporting Period: 201404'. Search filters include Parent Org. ID: H0__0, Contract: H5__2, and P number: P1__7. A table lists two payment entries. A summary table on the right shows payment information totals.

P Number	Invoiced Amt.	Payment Date	EFTID
P1__7	3.31	Deferred	
P1__6	1063.44	19-DEC-14	CG14013__9P1__6

Payment Information	
Total Invoiced	1066.75
Total Pending	0.00
Total Deferred	3.31
Total Failed	0.00
Total Successful	1063.44
Total Outstanding	0.00

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

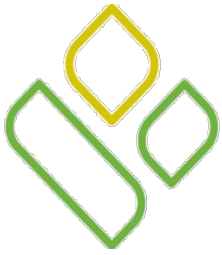
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Completed Tab Regions



CGDP Portal DPP-Sponsors Tabbed & Invoiced Reporting Period Regions

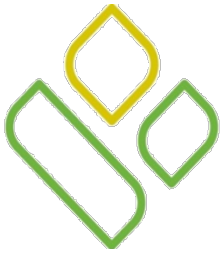
The first two regions of the **Completed** tab are the **Tabbed region** and the **Invoiced Reporting Period region**.

The screenshot shows the CGDP Portal interface. At the top left is the Palmetto GBA logo (A CELESTIAN GROUP COMPANY). In the center is the CMS logo (CENTERS FOR MEDICARE & MEDICAID SERVICES). At the top right are links: [Contact Us](#) | [My Profile](#) | [Logout](#) | [Help](#) | [Reporting](#). Below the navigation bar is a horizontal menu with five tabs: Home, Payments, Completed, Receipts, and Reports. The 'Completed' tab is highlighted with a red box and a circled '1'. Below the tabs, the page content shows 'Sponsor Portal' in red, 'CGDP Completed Payments' in large black text, and 'Invoiced Reporting Period: 201404' with a circled '2' next to it.

The **Tabbed region** – **Completed** provides the access to the **Completed** tab to review invoice line items that have completed the payment process or have been deferred.


The **Completed Invoiced Reporting Period region** displays the selected reporting quarter based on the reporting period selected in the **Home Filter region** in YYYYQQ format.

In this example the **Completed** tab is active and the **Completed Invoiced Reporting Period** for displayed invoice line items is the 4th quarter of 2014.



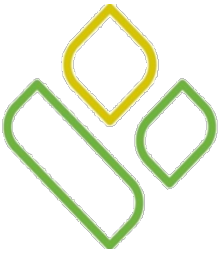
CGDP Portal DPP-Sponsors Completed Filter Region

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

3 Parent Org. ID: H0__0 Contract: H5__2 ▼ P number: P1__7 ▼ 

- Parent Org. ID: defaults to the Parent Organization ID used to log into the Portal.
- Contract: 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 completed invoice line items within the same reporting period. The field defaults to the Contract Number associated with the distributed invoice selected on the **Home** tab.
- P Number: displays the P Number for completed invoice line items. This field defaults to the Manufacturer invoice items associated with the Contract Number for the specific reporting period. If multiple P Numbers are associated with the reporting period for the Contract Number, the field defaults to 'ANY'.

In the example, the Parent Org. ID field displays the default Parent Organization ID used to access the Portal, the Contract field displays the selected Sponsor Contract Number of H5__2 and the P Number field displays the Manufacturer P Number of P1__7 associated with the invoice items associated with the contract number.



CGDP Portal DPP-Sponsors

Completed Payment Information Region

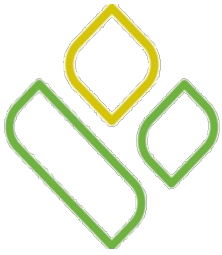
The fourth region of the **Completed** tab, the **Payment Information region**, provides a summary view of activities that occur on the **Completed** tab.

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

④

<u>Payment Information</u>	
Total Invoiced	1066.75
Total Pending	0.00
Total Deferred	3.31
Total Failed	0.00
Total Successful	1063.44
Total Outstanding	0.00

- Total Invoiced: displays total dollar amount of invoice line items that are distributed for processing for the reporting period.
- Total Pending: displays the total dollar amount of invoice line items selected for payment for the reporting period.
- Total Deferred: displays the total dollar amount of deferred invoice line items with amounts due that are less than the allowable amount to the subsequent reporting period.
- Total Failed: displays the total dollar amount of invoice line items selected for payment that contained errors and did not complete the payment process for the reporting period.
- Total Successful: displays the total dollar amount of invoice line items that have successfully paid and are no longer visible in the **Pending Transactions** regions of the **Payments** tab.
- Total Outstanding: displays the total dollar amount of remaining invoice line items requiring processing.



CGDP Portal DPP-Sponsors Completed Transactions Region

The fifth and final region of the **Completed** tab, the **Completed Transaction region**, provides a detail view of successful invoice payments or deferred invoices.

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P Number	Invoiced Amt.	Payment Date	EFTID
P1__7	3.31	Deferred	CG14015__2P1__7
P1__6	1063.44	19-DEC-14	CG14013__9P1__6

This region contains the following four fields that assist in reviewing successful payments or deferred invoices:

- P Number: displays the Manufacturer P Number.
- Invoiced Amt.: displays the invoice line item amounts processed for the Manufacturer.
- Payment Date: displays information regarding the status of the payment.
 - Displays 'Deferred' if the invoice line item selected to be deferred to subsequent reporting period.
 - Displays the calendar date for the date the payment request for withdrawal of funds from the Sponsors' bank account is initiated, in MM/DD/YYYY format.
- 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.
 - Example: CG14011##8H###3.

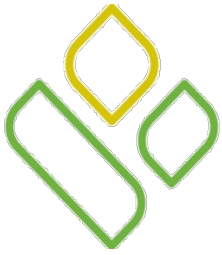
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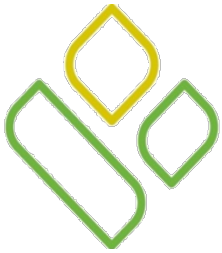
***Completed Tab Functionality
Work Instruction***



CGDP Portal DPP-Sponsors Completed Tab Work Instruction

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



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



CGDP Portal DPP-Sponsors Completed Filter Search


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

In the following example the Contract field is populated with H3__9 and the **Completed** tab is active.

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

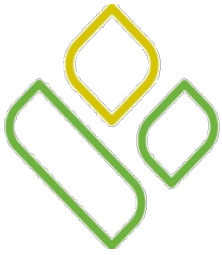
Sponsor Portal **CGDP Completed Payments** Invoiced Reporting Period: 201401

Parent Org. ID: H0__0 Contract: **H3__9** ▼ P number: ANY ▼ 

P Number	Invoiced Amt.	Payment Date	EFTID
P1__2	2.86	Deferred	CG14015__2P1__7
P1__0	27.13	12/30/2014	CG14013__9P1__6

Payment Information	
Total Invoiced	621.66
Total Pending	0.00
Total Deferred	2.86
Total Failed	0.00
Total Successful	27.13
Total Outstanding	591.67



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 Deferred Completed Payments


Locate invoice line item(s) with the Payment Date populated with Deferred in the **Completed Transactions** region.

In the following example the invoice line item of \$2.86 displays with the Payment Date of Deferred.

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

Sponsor Portal **CGDP Completed Payments** Invoiced Reporting Period: 201401

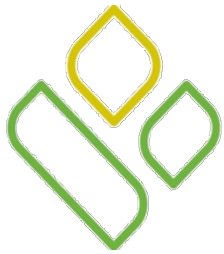
Parent Org. ID: H0__0 Contract: H3__9 ▾ P number: ANY ▾ 

P Number	Invoiced Amt.	Payment Date	EFTID
P1__2	2.86	Deferred	CG14015__2P1__7
P1__0	27.13	12/30/2014	CG14011__0H3__9

Payment Information

Total Invoiced	621.66
Total Pending	0.00
Total Deferred	2.86
Total Failed	0.00
Total Successful	27.13
Total Outstanding	591.67


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 Successful Completed Payments

Locate invoice line item(s) with the Payment Date populated with a calendar date in MM/DD/YYYY format, that payment processing completed.

In the following example the invoice line item of \$27.13 displays with the completed Payment Date of 12/30/2014.



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Home Payments **Completed** Receipts Reports

Sponsor Portal **CGDP Completed Payments** Invoiced Reporting Period: 201401

Parent Org. ID: H0__0 Contract: H3__9 P number: ANY

P Number	Invoiced Amt.	Payment Date	EFTID
P1__2	2.86	Deferred	CG14015__2P1__7
P1__0	27.13	12/30/2014	CG14011__0H3__9

Payment Information	
Total Invoiced	621.66
Total Pending	0.00
Total Deferred	2.86
Total Failed	0.00
Total Successful	27.13
Total Outstanding	591.67

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

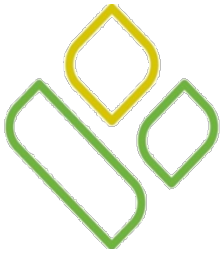
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Training Review

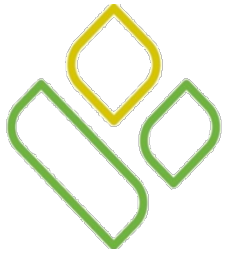


CGDP Portal DPP-Sponsors Training Review

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

This training introduced you to the following topics:

1. First look introduction of the **Completed** Tab
2. **Completed Tab Regions**
 - **Tabbed region-Completed**
 - **Completed Invoiced Reporting Period Region**
 - **Completed Filter Region**
 - **Completed Payment Information Region**
 - **Completed Transactions Region**
3. **Work Instruction for utilizing the Completed tab functionality**



CGDP Portal DPP-Sponsors Questions

Questions?

