

ISO ClaimSearch



# Medicare Secondary Payer Reporting Service

Best Practices

July 2015



XACTWARE

ISO had developed the ISO ClaimSearch® Medicare Secondary Payer Reporting Service to help insurers comply with mandatory claim reporting requirements of Section 111 of the Medicare, Medicaid, and SCHIP Extension Act of 2007 (P.L. 110-173).

ISO's primary role as your reporting agent is to:

- Collect data provided by your company
- Report your data to CMS
- Supply your company with tools to help manage and verify the data provided

We are not in the position to provide policy guidance or monitor your individual RRE for compliance. This responsibility falls on you as the insurer. It is important that you familiarize yourself with both ISO's Medicare Secondary Payer Reporting Service User Guide and the MMSEA Section 111 Liability Insurance (Including Self-Insurance), No-Fault Insurance, and Worker's Compensation User Guide. It is also important that you review and validate the data that you submit to ISO ClaimSearch on a regular basis.

In order to better serve you, we have developed a list of Best Practices. It is our hope that by following this checklist, you will have an easier time managing and validating your company's reportable data.

## Monthly Query Files

### 1. Monitor the COBC Website

Account Managers and Designees have access to the COBC website found at:  
<https://www.cob.cms.hhs.gov/Section111/LoginWarning.action>

This website can be used to check on the status of your monthly query files.

- Make sure that the correct number of claims are queried each month.
- Make sure that your files are in processing or complete status and were not deleted or being held for processing.

### 2. Review ISO's Executive Analysis Report found on the Account Management page of the ClaimSearch website.

- Monitor the percentage of SSN and DOB data being populated on casualty and worker's comp claims since these fields are required for querying; without these fields, ISO will not query your claims.
- If you utilize the Append DS service to perform public records searches to obtain the SSN for you, be sure that your company updates the claim to add the SSN that was obtained through the Append DS search.

### 3. Request a Pre-Query Extract file from your ISO Account Executive in order to add or subtract claims from being queried. If claims that were closed prior to the CMS threshold date continue to be unnecessarily queried each month, you can provide a closing date through this extract file to stop the query. Or, if you have claims that are missing required query fields such as RRE code, SSN or DOB, you can add those fields through this process.

### 4. Review the Query Results file which is posted to the Account Management page of the ClaimSearch website and update the claims to be sent to CMS by adding the Medicare Eligible = Y to the appropriate claimants along with all of the other fields that CMS requires for quarterly reporting.

### 5. Automate the Retrieval of Query Results

If you are interested in receiving the query results via automatic posting to an FTP account each month so that you can automate the retrieval of the file vs. manually retrieving it from the ClaimSearch website, please send a request to [claimsearchmsp@iso.com](mailto:claimsearchmsp@iso.com).

## Quarterly Claim Files

### 1. Monitor the COBC Website

Account Managers and Designees have access to the COBC website found at:

<https://www.section111.cms.hhs.gov/MRA/LoginWarning.action>

This website can be used to check on the status of your monthly query files.

- Make sure that the correct number of claims are being sent each quarter.
- Make sure that your files are in processing or complete status and were not deleted or being held for processing.

### 2. **Perform System Checks** (*For customers who have built an automated interface to ClaimSearch*)-

While testing Universal Format implementation and changes, review the claim echo to make sure that all fields being sent on input appear on the echo of your report in order to verify that all fields have been properly programmed. It is a good idea to periodically perform regression testing and to monitor your production results.

### 3. **Request a Preview File** – If you are interested in receiving a copy of your quarterly file as it would appear 2 weeks prior to your reporting date (so that you can review the data prior to your reporting period in order to identify any problems or last-minute changes needed to claims), please send a request to [claimsearchmsp@iso.com](mailto:claimsearchmsp@iso.com).

### 4. **Review and correct ClaimSearch rejected claims** – For both querying and quarterly reporting, it is important to make sure that your claims have met the basic ClaimSearch requirements and successfully added to the ClaimSearch database. If your claims reject from ClaimSearch, they cannot be queried or reported to CMS until the corrections have been made. If your company has an automated interface to ClaimSearch, make sure there is a process built to review/correct rejected claims.

### 5. **Review ISO's Active Warnings** – In order to alert you to missing or invalid CMS required fields prior to your submission to CMS, ISO provides you with warning messages on your ClaimSearch match reports, and also a summary of all Active Warnings on the Account Management page of the ClaimSearch website. You should review these Active Warnings on a regular basis in order to avoid CMS rejected claims.

6. **Correct CMS Rejected Claims** – Review the quarterly Accepted and Rejected result files which are posted to the Account Management page of the ClaimSearch website. For any claims that CMS rejected, you have until the following quarterly reporting period to correct those claims so they can be re-submitted to CMS in the next quarterly file.
  
7. **Automate the Retrieval of Quarterly Results** - If you are interested in receiving the quarterly results automatically posted to an FTP account each quarter so that you can automatically so that you can automate the retrieval of the file vs. manually retrieving it from the ClaimSearch website, please send a request to [claimsearchmsp@iso.com](mailto:claimsearchmsp@iso.com)
  
8. **Review ISO's Quarterly Statistics Report** found on the Account Management page of the ClaimSearch website.
  - Verify that the number of add, update and delete records sent to CMS by Plan Type is accurate.
  
9. **Review ISO's Medicare Eligible Claimant Report** found on the Account Management page of the ClaimSearch website.
  - The report provides a monthly list of claimants that your company has marked as Medicare eligible = Y during that month; these are the claims that will potentially be reported to CMS. Make sure all claimants that should be reported to CMS have been updated with the Medicare eligible indicator.
  
10. **Update ORM Claims with Termination Date** – For ORM claims, make sure you send an updated claim to supply the ORM termination date when your responsibility ends. Do not change the ORM indicator to “no”; only add the termination date.
  
11. **Update TPOC Claims with TPOC Date and Amount** – For TPOC claims, make sure you send an updated claim to supply the TPOC date and amount upon settlement since TPOC claims are not reported to CMS until these fields are provided.

For more information, please send questions to the ISO ClaimSearch Medicare Secondary Payer mailbox at [ClaimSearchMSP@iso.com](mailto:ClaimSearchMSP@iso.com) or contact customer service at 1-800-888-4476.

© Insurance Services Office, Inc., 2015. ISO, the ISO logo, ISO ClaimSearch, Verisk Analytics, and the Verisk Analytics logo are registered trademarks and Verisk, Verisk Insurance Solutions, and the Verisk Insurance Solutions logo are trademarks of Insurance Services Office, Inc. AIR Worldwide and the AIR Worldwide logo are registered trademarks of AIR Worldwide Corporation. Xactware is a registered trademark of Xactware Solutions, Inc. All other product or corporate names are trademarks or registered trademarks of their respective companies. We are providing this material for informational purposes only. Any reproduction or distribution without permission is strictly prohibited.



AIR WORLDWIDE®

XACTWARE®