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# Program Memorandum Intermediaries/Carriers

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Department of Health &  
Human Services (DHHS)  
Centers for Medicare &  
Medicaid Services (CMS)

TRANSMITTAL AB-03-081

DATE: MAY 30, 2003

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## CHANGE REQUEST 2748

**This Program Memorandum (PM) supersedes the ECRS manual reference in AB-02-140, dated October 11, 2002. Disregard the ECRS manual reference in AB-02-140 immediately.**

**SUBJECT: Data Center Testing and Production - Electronic Correspondence Referral System (ECRS) User Manual 6.0**

On May 30, 2003, the Coordination of Benefits Contractor (COBC) will transmit ECRS Version 6.0 to all data centers for testing through established AT&T Global Network and Advantix telecommunication lines. Data centers should complete testing within the standard testing timeframes. If a replacement version of ECRS is necessary as a result of testing, the COBC will transmit a replacement version of ECRS 6.0 to all data centers by June 23, 2003. If there are no software problems identified with the current test version; this test version will be converted to a production version to be operational on August 4, 2003.

Attachment 1 highlights new and improved features within the Program Memorandum (PM) and specific processing requirements to be followed. The ECRS Version 6.0 draft manual (Attachment 2) is being supplied for Medicare contractor and CMS RO use for maneuvering through the systems application test processes. Attachment 3 is the ECRS Quick Reference Guide.

### **Instructions for Printing and Folding Quick Reference Card:**

To print the ECRS Quick reference Card on 8 ½ x 14" paper:

- 1) When printing the ECRS Quick reference Card, print only the first page, and then manually feed the paper back into your printer to print the second page.
- 2) With the title page side up, bring the right edge of the sheet up to meet the dotted line on the left and fold it.
- 3) Turn the page over clockwise. Bring the right side of the sheet up to meet the crease you just made and fold it.

Problems encountered by data centers should be reported to the GHI's help desk technical support staff at (212) 615-4357. Medicare contractors and RO MSP Coordinators may contact Alberta Smythe at (646) 458-6694. In addition, you may e-mail questions/concerns to the COBC via Internet address at [COB@ghimedicare.com](mailto:COB@ghimedicare.com). If Medicare contractors are unable to receive technical assistance after contacting Alberta and their RO MSP representative, contact Pat Murphy at 410-786-8123 or email at [pmurphy2@cms.hhs.gov](mailto:pmurphy2@cms.hhs.gov). RO MSP Coordinators should contact Pat Murphy if they are unable to receive technical assistance.

**The effective date for this Program Memorandum (PM) is August 4, 2003.**

**The implementation date for this PM is August 4, 2003.**

**These instructions should be implemented within your current operating budget.**

**This PM may be discarded after August 4, 2004.**

**3 Attachments (Attachments 2 and 3 are available electronically or via Web site only.)**

## **Highlighted New and Improved Features in ECRS 6.0**

### **1) Consolidation of ECRS/SNECRS Functionality**

- The functionality within SNECRS to retrieve Beneficiary and MSP data from HIMR to reduce keystrokes will now be done within the ECRS application. The user will press a function key after entering the HICN on the CWF Assistance Detail Screen and the MSP Inquiry Detail Screen. Beneficiary information such as name and address will be retrieved from either the COB database or the HIMR BENA Screen and returned to the applicable screen with the data filled. For CWF Assistance Requests, the user will be presented with a new screen within ECRS to choose the MSP occurrence they want to change at CWF.

### **2) ECRS Code Selection Screen**

- The user will have the ability to lookup and select commonly used codes within the ECRS application. The user can look-up and display codes and descriptions for the following fields:

Activity Codes  
Action Codes  
Source Codes  
Informant Relationship  
Insurance Type

The ECRS Code Selection Screen is accessed from the CWF Assistance Request Detail Screen or the MSP Inquiry Detail Screen by pressing a function key when the cursor is positioned on a lookup field. The user is transported to the ECRS Code Selection Screen to view the applicable codes and descriptions. The user can select a code to be returned to the field on the CWF Assistance Request Detail Screen or the MSP Inquiry Screen.

### **3) Work Load Tracking Screens**

- The ECRS Workload Tracking Screen provides Medicare Contractor Users and CMS Users with the statistics on the number of CWF assistance requests and MSP Inquires (sorted by activity code) that a contractor submitted during a user specified time. Contractors receive statistics for their own activity, while CMS receives statistics for all contractors. There is a new ECRS menu item to select the Workload Tracking Screen and an activity code field has been added to the CWF Assistance Request Detail Screen and the MSP Inquiry Detail Screen to capture the data. The following are valid activity codes:
  - C – Claims (Prepayment) (22001)
  - N – Liability, no fault, WC, and Federal Tort Claim Act (42002)
  - G – Group Health Plan (42003)
  - I – General Inquires (42004)
  - D – Debt Collection/Referral (42021)
- The statistics will also include a count of rejected duplicate CWF Assistance Request Records (CM53). With this release of ECRS, duplicate MSP Inquires will also be rejected with a CM53 and will be included in the rejected workload counts. MSP Inquires that are rejected because the record already exists at CWF and a CWF Assistance Request should be submitted (CM87) are also included in the rejected workload counts.

### **4) Workers Compensation Set Aside Changes**

- Additional fields have been added to the Workers Compensation Set-Aside Detail Screen to provide additional reporting information. The RO can now set up records that are in process and a final settlement arrangement has not been determined. Setting up in process records shall create regular Workers Compensation records at CWF until a final determination and a settlement date has been received. The settlement amount and administrator information is required when a record is submitted marked approved and final.

## 5) Expanded Search Criteria for Contractors

- Contractors now have the ability to search by HICN for any CWF Assistance Request or MSP Inquiry submitted by any contractor within any user-designated time frame in the effort to reduce duplicate submissions. Contractors may also search by HICN to determine if there is a lead contractor assigned to a beneficiary for a period of MSP coverage.

## 6) Enhanced CICS Error Message

- Occasionally users lose connectivity to ECRS and it can often be a problem at the contractor site. When connectivity is lost the user will receive a message to contact their help desk regarding connectivity. The application ID is also displayed to the user to provide to their help desk for troubleshooting.

## 7) Action and Reason Codes

- Action Code EA (Employer Address) will once again be a valid action code for a CWF Assistance Request Detail Screen. The action code is valid for source types CHEK, SCLM, PHON, and LTTR.
- Action code DE (Develop to the Employer) is now valid for a CWF Assistance Request. This code cannot be used with any other action code.
- Action Code DI (Develop to the Insurer) is now valid for an Assistance Request. This code cannot be used with any other action code.
- Action Code SR (Suppress Right of Recovery Letters) is now valid for a CWF Assistance Request when used with action code CV (Change Venue).
- Action Code CL (Case settled or closed) is now valid for a CWF Assistance Request.
- Action Code NR (Add duplicate No-fault Record) has been added for a CWF Assistance Request.
- Documentation for Reason code 86 (Unable to verify address) and 87 (MSP record already exists) is included with this release.
- Reason code 88 (No update, not lead contractor) has been added for Assistance Requests.
- Reason Code 89 (No update, below threshold) has been added for Workers Compensation Set-Aside Records.

## 8) 'Send to CWF' Switch on MSP Inquiries

- The send to CWF switch indicates that an immediate HUSP should be created. The default for this switch to a 'Y' has changed for certain circumstances. When pertinent information is not provided or the instructions to COBC are to develop to a certain entity, an immediate HUSP will not be created, and the MSP inquiry will be developed for the required information. The switch will default to an 'N' in the following circumstances:
  - a) If the Action code entered on the MSP Inquiry is DI (develop to insurer)
  - b) If the Action code entered on the MSP Inquiry is DE (develop to employer)
  - c) If the MSP Inquiry has an EGHP MSP type and employer name and address information is not provided.
  - d) If the MSP Inquiry has a non-EGHP MSP type and either the attorney name and address or the insurer name and address is not provided and the diagnosis and the date of loss are not provided.

## 9) Online Edits

- An error message will display if the MSP Type is A, B, or G and a Date of Loss is entered.
- An error message will display if invalid data is entered in the Insurer Name field.

## 10) Switching a MSP Inquiry to a CWF Assistance Request when the Inquiry was rejected with CM87 (MSP already exists, submit an Assistance Request)

- When a contractor receives a rejected MSP Inquiry with reason code 87 because the MSP occurrence already exists at CWF, the contractor may now select the rejected inquiry from the list and a CWF Assistance Request Detail Screen will display with the fields from the inquiry filled. The contractor will need to add an action code, aux number, originating contractor number and any other relevant information.
-

**11) Subscriber and Insured Names**

- The subscriber name is being eliminated from the CWF Assistance Request Detail Screen and the MSP Inquiry Screen and the insured name field has been changed to Policy Holder/Subscriber name to accurately capture the name of the person that has the other insurance policy.

**12) Insurer and Employer Phone Number Fields**

- Fields have been added to the CWF Assistance Request Detail Screen and the MSP Inquiry Detail Screen to capture the phone numbers of Employers and Insurers.

# **Attachment 2**

## **Electronic Correspondence Referral System (ECRS)**

### **User Guide**

**Version 6.0**

***Rev. 03-01/July 2003***

***GHI-DI-501-6.0***

## **Confidentiality and Disclosure of Information**

Section 1106 (a) of the Social Security Act as it applies to the Centers for Medicare & Medicaid Services (CMS) - (42 CFR Chapter IV Part 401 §§ 401.101 to 401.152) prohibits disclosure of any information obtained at any time by officers and employees of Medicare Intermediaries or Carriers in the course of carrying out agreements under Sections 1816 and 1842 of the Social Security Act, and any other information subject to Section 1106 (a) of the Social Security Act.

Section 1106 (a) of the Act provides in pertinent part that “Any person who shall violate any provision of this section shall be deemed guilty of a misdemeanor and, upon conviction thereof, shall be punished by a fine not exceeding \$1,000, or by imprisonment not exceeding one year, or both.” Additional and more severe penalties are provided under Title XVIII (Medicare) USC Section 285 (unauthorized taking or using of papers relating to claims) and under Section 1877 of Title XVIII of the Act (relating to fraud, kickbacks, bribes, etc., under Medicare).

These provisions refer to any information obtained by an employee in the course of their performance of duties and/or investigations (for example, beneficiary diagnosis, pattern of practice of physicians, etc.).

The Electronic Correspondence Referral System (E CRS) contains IRS tax data.\* Any unauthorized inspection or disclosure of IRS return information in violation of any provision of Section 6103 may bring damages as described in IRC Sections 7431 and 7213, which include, but are not limited to, a fine of any amount not exceeding \$5,000 or imprisonment.

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\* IRS tax data is defined as the Employer Identification Number (EIN) and address, as well as the employee’s spouse’s name and Social Security Number (SSN).

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## Chapter 1: Introduction

This chapter contains an introduction to the *Electronic Correspondence Referral System (ECRS) User Guide*. Refer to the chart below or the Table of Contents to locate topics in this chapter.

If you want to see information about this...	See this page...
<i>ECRS User Guide</i>	1-2
User Guide Conventions	1-2
What is ECRS?	1-3
Logging On	1-4
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## About this Guide

This guide was written to help you understand the Electronic Correspondence Referral System (ECRS). The guide is divided into three parts to help you quickly and easily find the information you need.

Chapter 1, the *Introduction*, is the section you are reading now. It contains information about how to use the guide. It also includes basic information about ECRS. If you are unfamiliar with the system or are not an experienced computer user, read the entire *Introduction* before reading the rest of the guide.

Chapter 2 is the *Task and Screen Reference*. It contains step-by-step instructions for performing ECRS tasks, as well as examples of each screen in ECRS with complete descriptions of the fields.

The last section is the *Appendices*, which contains a chart of ECRS CICS error messages and actions for resolution, a list of frequently asked questions, and a glossary that defines terms and acronyms associated with ECRS.

## User Guide Conventions

This section explains how information appears in the guide. Understanding the conventions will help you to better understand the tasks and screen explanations.

**Information that you enter** on the computer screen appears in **bold typeface**. For example, you may read this instruction: Type **ECRS** and press [Enter]. **ECRS** is in bold typeface because you are supposed to type those letters.

**System messages** appear in CAPITAL LETTERS. For example, you may read this: The system displays the message, "FUNCTION KEY NOT ACTIVE."

**Function and computer key** names appear within [brackets]. For example, you may read this instruction: Press [Enter]. You may also read: Press [PF9].

**Computer screen examples** are representative of the screens that you see on your computer. The actual information may not be the same, unless otherwise noted in the guide.

**Pointers** throughout the guide can help you locate information. The guide includes a master Table of Contents in the front, and smaller Tables of Contents at the beginning of the longer chapters. In addition, each page has headers and footers that you can use to determine where you are in the guide.

## What is ECRS?

**Note:** Please see the *Confidentiality and Disclosure of Information* statement on the inside of the title page regarding the appropriate handling of information contained in ECRS.

The Electronic Correspondence Referral System (ECRS) allows MSP representatives at the Medicare contractor sites and at authorized CMS Regional Offices (ROs) to fill out various online forms and electronically transmit requests for changes to existing CWF MSP information, inquiries concerning possible MSP coverage, and document copy transactions to the COB contractor. The transactions are automatically stored on the COB contractor's system. Each evening, a batch process reads the transactions and processes the requests. The status on each transaction is updated as it moves through the system.

Transactions are entered and viewed in ECRS by contractor number. An organization with more than one contractor number must determine how it wants to group its activity. If the organization wants to see all of the records together, it should use only one contractor number for all ECRS activities. If the organization wants to distinguish the transactions by contract, it should use its different contractor numbers.

ECRS uses action codes to determine what information should be updated on the MSP auxiliary occurrence at CWF or what type of special processing should be performed on an MSP inquiry record. For example, if you type action code EI in the ACTION(S) field, only the information you type in the employer fields (employer name, street, city, ZIP code, EIN, and employee number) will be updated on the MSP auxiliary occurrence at CWF.

For CWF assistance request transactions, you are required to enter at least one action code, but you have the ability to enter a maximum of four action codes. For MSP inquiries, you are not required to enter any action codes.

If you type information in a field (for example, TERM DT), but you do not type the corresponding action code TD in the ACTION(S) field, the system will not update that information on the MSP auxiliary occurrence at CWF.

## Basic Functions

### Logging On

1. Log into a local Medicare CICS region.
2. Type ECRS and press [Enter]. The system displays the ECRS splash screen, as shown in the example below.

```

EEEEEE  CCCCCC RRRRRRR  SSSS
EE      CC      RR      R  SS
EE      CC      RR      R  SS
EEEEEE  CC      RRRRRRR  SSSS
EE      CC      RR  RR      SS
EE      CC      RR  RR      SS
EEEEEE  CCCCCC RR      RR  SSSS

          VERSION 6.0

**WARNING** THE SYSTEM YOU ARE ABOUT TO ENTER CONTAINS IRS TAX DATA.
ANY UNAUTHORIZED INSPECTION OR DISCLOSURE OF IRS RETURN INFORMATION
IN VIOLATION OF ANY PROVISION OF SECTION 6103, MAY BRING DAMAGES AS
DESCRIBED IN IRC SECTIONS 7431 AND 7213 WHICH INCLUDE BUT ARE NOT
LIMITED TO A FINE OF ANY AMOUNT NOT EXCEEDING $5,000 OR IMPRISONMENT.

          PRESS <ENTER> TO CONTINUE

```

3. Press [Enter]. The system displays the COB Electronic Correspondence Referral System (ECRS) login screen, as shown in the example below.

```

          COB ELECTRONIC CORRESPONDENCE REFERRAL SYSTEM (ECRS)      MM/DD/YY

          CMS RO NUMBER: _____ ACCESS CODE: _____

          CONTRACTOR NUMBER: _____ ACCESS CODE: _____

          REPRESENTATIVE: _____
          PHONE: _____ - _____ - _____

          COB CONTRACTOR BULLETIN BOARD

          _____
          _____
          THE COB CONTRACTOR
          _____
          WELCOMES
          _____
          YOU TO ECRS
          _____
          _____

          PF12=EXIT

```

4. Use the chart below to locate the appropriate action.

If you are a...	Follow these steps:
Medicare contractor	<ol style="list-style-type: none"> <li>1. Type your contractor number (unique five-digit number assigned by CMS) in the CONTRACTOR NUMBER field.</li> <li>2. Type your access code (five-character authorization code assigned by the COB contractor) in the ACCESS CODE field.</li> <li>3. Type the name of the contractor representative in the REPRESENTATIVE field.</li> <li>4. Type the contractor representative's telephone number in the PHONE field.</li> </ol>
CMS user	<ol style="list-style-type: none"> <li>1. Type your CMS ID number in the CMS RO NUMBER field.</li> <li>2. Type your access code in the ACCESS CODE field.</li> </ol>

5. Press [Enter]. The system displays the COB Electronic Correspondence Referral System (ECRS) main menu screen, as shown in the example below.

```

          COB ELECTRONIC CORRESPONDENCE REFERRAL SYSTEM (ECRS)          MM/DD/YY
CONTRACTOR NUMBER: _____
USER ID: _____ STATUS: ___ REASON: ___ HICN: _____ DCN: _____
SEARCH ORIGIN DATE FROM: _____ THROUGH: _____

SELECTION  ___
          01 CWF ASSISTANCE REQUEST DETAIL
          02 CWF ASSISTANCE REQUEST LIST
          03 DOCUMENT COPIES
          04 MSP INQUIRY DETAIL
          05 MSP INQUIRY LIST
          06 LEAD CONTRACTOR ASSIGNMENT
          07 DEVELOPING CONTRACTOR NOTIFICATION
          08 MSP CHANGED RECORD NOTIFICATION
          09 WORKERS COMP SET ASIDE DETAIL
          10 WORKERS COMP SET ASIDE LIST
          11 WORKLOAD TRACKING SCREEN

          F3=RETURN F2=EXIT
    
```

You now have the ability to access information in ECRS.

### Logging Off

Press [PF12] or [Pause/Break] on any screen to exit ECRS. The system displays the following message: "ECRS TRANSACTION HAS BEEN TERMINATED."

## COB ECRS Login Screen Description

```

COB ELECTRONIC CORRESPONDENCE REFERRAL SYSTEM (ECRS)      MM/DD/YY

CMS RO NUMBER: _____ ACCESS CODE: _____
CONTRACTOR NUMBER: _____ ACCESS CODE: _____

REPRESENTATIVE: _____
PHONE: ____ - ____ - _____

          COB CONTRACTOR BULLETIN BOARD

          _____
          _____
          THE COB CONTRACTOR
          _____
          WELCOMES
          _____
          YOU TO ECRS
          _____
          _____

          PF12=EXIT
  
```

COB ECRS Login Screen	
Field Name	Description
CMS RO NUMBER	CMS Regional Office identification number. <i>Required field</i> for CMS users.
ACCESS CODE	Three-position alphabetic authorization code for CMS users. <i>Required field</i> for CMS users.
CONTRACTOR NUMBER	Unique five-digit identification number assigned to each Medicare contractor by CMS. <i>Required field</i> for contractors.
ACCESS CODE	Five-character authorization code assigned by COB contractor. <i>Required field</i> for contractors.
REPRESENTATIVE	Contact person at contractor site <b>Note:</b> Although this field is not required, contractors are encouraged to enter information here, as the system carries this data forward to other screens, eliminating the need to re-enter it.
PHONE	Phone number of contractor representative <b>Note:</b> Although this field is not required, contractors are encouraged to enter information here, as the system carries this data forward to other screens, eliminating the need to re-enter it.
COB CONTRACTOR BULLETIN BOARD	Bulletins created in COB system

**Transportation**

<b>COB ECRS Login Screen</b>	
<b>PF Key</b>	<b>Function</b>
12	Exit ECRS

**COB ECRS Main Menu Screen Description**

```

COB ELECTRONIC CORRESPONDENCE REFERRAL SYSTEM (ECRS)      MM/DD/YY

CONTRACTOR NUMBER: _____

USER ID: _____ STATUS: __ REASON: __ HICN: _____ DCN: _____

SEARCH ORIGIN DATE FROM: _____ THROUGH: _____

SELECTION  __

          01 CWF ASSISTANCE REQUEST DETAIL
          02 CWF ASSISTANCE REQUEST LIST
          03 DOCUMENT COPIES
          04 MSP INQUIRY DETAIL
          05 MSP INQUIRY LIST
          06 LEAD CONTRACTOR ASSIGNMENT
          07 DEVELOPING CONTRACTOR NOTIFICATION
          08 MSP CHANGED RECORD NOTIFICATION
          09 WORKERS COMP SET ASIDE DETAIL
          10 WORKERS COMP SET ASIDE LIST
          11 WORKLOAD TRACKING SCREEN

          F3=RETURN F12=EXIT
    
```

<b>COB ECRS Main Menu Screen</b>	
<b>Field Name</b>	<b>Description</b>
CONTRACTOR NUMBER	Type your Medicare or RO contractor number (for options 02, 05, and 06) to view CWF assistance request transactions, MSP inquiries, and lead contractor assignments for your site or Regional Office. Otherwise, type a CMS-issued Medicare contractor number (for options 07 and 08) to view developing contractor and MSP changed record notifications for the specified Medicare contractor.
USER ID	User ID of operator, automatically entered by system. Use this field with options 02 and 05 to find specific ECRS transactions. You can combine this field with STATUS, REASON, and/or SEARCH ORIGIN DATE FROM and THROUGH dates to further refine a search.
STATUS	Status code of record. Use this field with options 02 and 05 to find specific ECRS transactions. You can combine this field with USER ID, REASON, and/or SEARCH ORIGIN DATE FROM and THROUGH dates to further refine a search.

<b>COB ECRS Main Menu Screen</b>	
<b>Field Name</b>	<b>Description</b>
REASON	Reason code of record. Use this field with options 02 and 05 to find specific ECRS transactions. You can combine this field with USER ID, STATUS, and/or SEARCH ORIGIN DATE FROM and THROUGH dates to further refine a search.
HICN	Health Insurance Claim Number. Searches for all ECRS transactions related to a specific beneficiary. Use in conjunction with SEARCH ORIGIN DATE FROM and THROUGH dates to further refine a search.
DCN	Document Control Number assigned by Medicare contractor or CMS RO. Use this field with options 02 and 05 to find specific ECRS transactions. You can combine this field with SEARCH ORIGIN DATE FROM and THROUGH dates to further refine a search.
SEARCH ORIGIN DATE FROM	Starting date of date range. Lists transactions originating after this date for CWF assistance requests, MSP inquiries, Lead Contractor, and Developing Contractor screens. Use this field in conjunction with any other selection criteria fields to further refine a search. Defaults to 30 days prior to current date.
THROUGH	Ending date of date range. Lists transactions originating before this date for CWF assistance requests, MSP inquiries, Lead Contractor, and Developing Contractor screens. Use this field in conjunction with any other selection criteria fields to further refine a search. Defaults to current date.



<b>COB ECRS Main Menu Screen</b>									
<b>Field Name</b>	<b>Description</b>								
SELECTION	<p>Selection field. Options are:</p> <ul style="list-style-type: none"> <li>01 CWF Assistance Request Detail</li> <li>02 CWF Assistance Request List</li> <li>03 Document Copies</li> <li>04 MSP Inquiry Detail</li> <li>05 MSP Inquiry List</li> <li>06 Lead Contractor Assignment</li> <li>07 Developing Contractor Notification</li> <li>08 MSP Changed Record Notification</li> <li>09 Workers Comp Set Aside Detail (for designated CMS users only)</li> <li>10 Workers Comp Set Aside List (for designated CMS users only)</li> <li>11 Workload Tracking Screen</li> </ul> <p><b>Note:</b> Use the chart below to determine valid search criteria for the various selection options.</p> <table border="1" style="margin-left: auto; margin-right: auto;"> <thead> <tr> <th><b>Selection Option</b></th> <th><b>Valid Search Criteria</b></th> </tr> </thead> <tbody> <tr> <td>02, 05</td> <td>Contractor Number, HICN, User ID, Status, Reason, DCN, Origin Date From, and Through in any combination except you cannot combine DCN and HICN searches. In addition, you must combine searches on Origin Date From and/or Through, User ID, Status, and Reason with a DCN, HICN or Contractor Number search.</td> </tr> <tr> <td>06, 07, 08</td> <td>HICN or Contractor Number with or without Origin Date From and Through</td> </tr> <tr> <td>10</td> <td>SSN, HICN, Reason, Status, Origin Date From, and Through</td> </tr> </tbody> </table>	<b>Selection Option</b>	<b>Valid Search Criteria</b>	02, 05	Contractor Number, HICN, User ID, Status, Reason, DCN, Origin Date From, and Through in any combination except you cannot combine DCN and HICN searches. In addition, you must combine searches on Origin Date From and/or Through, User ID, Status, and Reason with a DCN, HICN or Contractor Number search.	06, 07, 08	HICN or Contractor Number with or without Origin Date From and Through	10	SSN, HICN, Reason, Status, Origin Date From, and Through
<b>Selection Option</b>	<b>Valid Search Criteria</b>								
02, 05	Contractor Number, HICN, User ID, Status, Reason, DCN, Origin Date From, and Through in any combination except you cannot combine DCN and HICN searches. In addition, you must combine searches on Origin Date From and/or Through, User ID, Status, and Reason with a DCN, HICN or Contractor Number search.								
06, 07, 08	HICN or Contractor Number with or without Origin Date From and Through								
10	SSN, HICN, Reason, Status, Origin Date From, and Through								

**Transportation**

<b>COB ECRS Main Menu Screen</b>	
<b>PF Key</b>	<b>Function</b>
03	Return to login screen
12	Exit ECRS

**Notes:**

## Chapter 2: Task and Screen Reference

### Introduction

This chapter is a task and screen reference. It describes tasks that are commonly performed in ECRS, and provides you with step-by-step instructions to accomplish each task. After each task, examples and explanations of the screens in ECRS are given.

If you are a new user, this chapter can help you use the system as you learn it. You can also use this chapter to determine what information is contained in each field or what you should enter in a field. It can also help you to navigate through the system if you are “lost.” If you are an experienced user, you can use the chapter as a quick reference for a task or screen that you use infrequently.

The screens in this chapter are representative of the actual screens that you see on your computer. The data will not be the same; the screen layout will be very similar, if not exactly the same.

Use the chart below or the *Table of Contents* to locate the tasks in the chapter.

For information about this task...	See this page...
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Screen Scraping Beneficiary Information for CWF Assistance Requests	2-19
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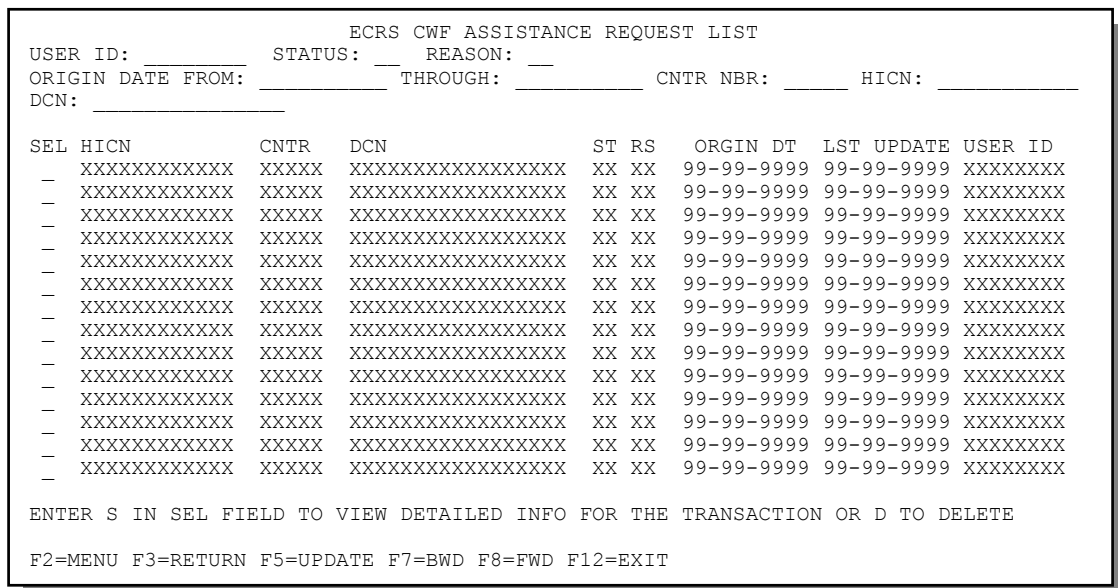
Use the chart below or the *Table of Contents* to locate the screens in this chapter. The screens below are listed in the order in which they appear on the ECRS main menu screen.

<b>For information about this screen...</b>	<b>See this page...</b>
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### Viewing the List of CWF Assistance Request Transactions

Follow the steps below to view the list of CWF assistance request transactions.

1. From the COB ECRS main menu screen, type **02** in the SELECTION field, and type the search criteria in the appropriate fields. Press [Enter]. The system displays the ECRS CWF Assistance Request List screen, as shown in the example below.



2. You can change or delete the search criteria to initiate a new search. You can perform searches using the following criteria:

Contractor Number, HICN, User ID, Status, Reason, DCN, Origin Date From, and Through in any combination except you cannot combine DCN and HICN searches. In addition, you must combine searches on Origin Date From and/or Through, User ID, Status, and Reason with a DCN, HICN or Contractor Number search.

The dates in the ORIGIN DATE FROM and THROUGH fields default to the dates entered in the SEARCH ORIGIN DATE fields on the COB ECRS main menu screen. If you did not enter dates in those fields on the COB ECRS main menu screen, the fields on this screen default to the date 30 days prior to the current date and the current date.

To search for all CWF assistance requests related to a specific beneficiary, type that beneficiary's HICN in the HICN field and press [Enter]. The system displays all assistance requests for that beneficiary.

Typing information in the appropriate fields and pressing [Enter] narrows or widens your search.

3. Press [PF7] to scroll backward or [PF8] to scroll forward through the list of CWF assistance request transactions.

4. If you want to view detailed information for a CWF assistance request transaction, type **S** in the SEL field next to the transaction for which you want to view detailed information. Press [Enter]. The system displays the first page of the ECRS CWF Assistance Request Detail screen for the selected transaction.
5. If you want to exit the ECRS CWF Assistance Request List screen, press [PF2] to return to the ECRS main menu without retaining current search criteria, [PF3] to return to the ECRS main menu while retaining current search criteria, or [PF12] to exit ECRS.

## ECRS CWF Assistance Request List Screen Description

<b>ECRS CWF Assistance Request List Screen</b>	
<b>Field Name</b>	<b>Description</b>
USER ID	User ID entered as search criteria, if applicable. This field is updateable; enter a different User ID to perform additional searches.
STATUS	Status code entered as search criteria, if applicable. This field is updateable; enter a different status code to perform additional searches. To view all in-process CWF assistance request transactions, type <b>IP</b> in the STATUS field and press [Enter].
REASON	Reason code entered as search criteria, if applicable. This field is updateable; enter a different reason code to perform additional searches.
ORIGIN DATE FROM	Starting date of date range entered as search criteria, if applicable. This field is updateable; enter a different From date in MMDDCCYY format to perform additional searches.
THROUGH	Ending date of date range entered as search criteria, if applicable. This field is updateable; enter a different Through date in MMDDCCYY format to perform additional searches.
CNTR NBR	Type a CMS-issued Medicare contractor number or your RO contractor number to view CWF assistance request transactions for a specific contractor or your Regional Office.
HICN	Health Insurance Claim Number entered as search criteria, if applicable. This field is updateable; enter a different HICN to perform additional searches.
DCN	Medicare contractor-assigned Document Control Number entered as search criteria, if applicable. This field is updateable; enter a different DCN to perform additional searches.
SEL	Selection field. Type <b>S</b> in this field and press [Enter] to transport to the ECRS CWF Assistance Request Detail screen. Type <b>D</b> in this field and press [PF5] to mark a new (status NW) CWF assistance request transaction for deletion.
HICN	Health Insurance Claim Number for CWF assistance request transaction ( <i>protected field</i> )
CNTR	Contractor number ( <i>protected field</i> )
DCN	Document Control Number assigned to CWF assistance request transaction by Medicare contractor ( <i>protected field</i> )
ST	Status of CWF assistance request transaction ( <i>protected field</i> ). For a list of valid status values, see page 2-9.

<b>ECRS CWF Assistance Request List Screen</b>	
<b>Field Name</b>	<b>Description</b>
RS	Reason of CWF assistance request transaction ( <i>protected field</i> ). For a list of valid reason values, see page 2-11.
ORGIN DT	Originating date in MM-DD-CCYY format ( <i>protected field</i> )
LST UPDATE	Date CWF assistance request transaction was last changed in MMDDCCYY format ( <i>protected field</i> )
USER ID	User ID of operator who entered CWF assistance request transaction ( <i>protected field</i> )

**Transportation**

<b>ECRS CWF Assistance Request List Screen</b>	
<b>PF Key</b>	<b>Function</b>
02	Return to ECRS main menu, current search criteria is not retained
03	Return to ECRS main menu, current search criteria is retained
05	Mark CWF assistance request transactions that have <b>D</b> in the SEL field for deletion
07	Scroll backward
08	Scroll forward
12	Exit ECRS

## Adding, Viewing, and Updating CWF Assistance Request Transactions

Use the ECRS CWF Assistance Request Detail screens to add, view, and update an ECRS CWF assistance request transaction. You can only update an assistance request transaction if it is in NW (new) status. If the COB system has started processing the information, you cannot request an update. Any user with the same contractor number can update a transaction in NW (new) status.

**Note:** Use these screens to add assistance request transactions for *changes to existing CWF MSP auxiliary occurrences*. If you want to submit an inquiry to the COB contractor about a *possible MSP situation not yet documented at CWF*, use the ECRS MSP Inquiry Detail screens (see page 2-27).

Common tasks performed on these screens, followed by the associated Action Code, are:

- Making changes to attorney information (AI), diagnosis codes (DX), effective date (ED), employer information and size (EI and ES), insurer information (II), insurance type (IT), MSP type (MT), patient relationship (PR), pre-paid health plan date (PH), and termination date (TD)
- Developing to an employer (DE) or to an insurer (DI)
- Adding a duplicate no-fault record (NR)
- Requesting deletion of a CWF MSP auxiliary occurrence (DO)
- Correcting an SSN/HICN mismatch (MX)
- Updating a record for a vow of poverty (VP)
- Adding a duplicate liability record (LR)
- Making documentation requests for generation of right of recovery letters (RR)
- Changing venue for lead contractor assignment (CV)
- Redeveloping a deleted CWF record (DR)

Follow the steps below to add, view, or update an ECRS CWF assistance request transaction.

1. From the COB ECRS main menu screen, type **01** in the SELECTION field and press [Enter]. The system displays the first page of the ECRS CWF Assistance Request Detail screen, as shown in the example below.

ECRS CWF ASSISTANCE REQUEST DETAIL		PAGE 1 OF 2
CNTR NBR. 99999	PHONE: ___-___-___	USER ID XXXXXXXX ORIG DT: 99-99-9999
CNTR REP.: _____	STATUS XX	XXXXXXXXXXXXXXXXXX
ACTION(S): ___-___-___	DCN: _____	REASON XX XXXXXXXXXXXXXXXXXXXX
ACTIVITY CODE: ___	SOURCE: _____	XXXXXXXXXXXXXXXXXX
BENE HICN: _____	SSN: ___-___-___	DOB: _____ SEX: _____
NAME: _____	PAT REL: _____	XXXXXXXXXXXXXXXXXX
MSP TYPE: _XXXXXXXXXXXXXXXXXX	EFF DT: _____	TERM DT: _____
AUX REC: _____	ACCR DT: _____	
ORIG CNTR: _____	CHANGE LEAD TO: _____	SEND VENUE LETTER? Y/N _
BENE STRT: _____		
CITY: _____	ST: ___ ZIP: _____	PHONE: ___-___-___
CHECK DATE: _____	CHECK AMOUNT: \$ ___, ___, ___.	CHECK NO: _____
INFMT NAME: _____	PHONE: ___-___-___	
STREET: _____		
CITY: _____	ST: ___ ZIP: _____	INFMT REL: _XXXXXXXXXX
EMPLR NAME: _____	EIN: _____	
STREET: _____	PHONE: ___-___-___	
CITY: _____	ST: ___ ZIP: _____	EMPLOYEE NO: _____
F2=MENU F3=RETURN F6=COB/HIMR F8=FWD F9=CODES F12=EXIT		



2. Type data in all of the required fields on the ECRS CWF Assistance Request Detail, Page 1 of 2 screen. The required fields on this screen are:
  - ACTION(S)
  - DCN
  - ACTIVITY CODE
  - SOURCE
  - BENE HICN
  - NAME
  - PAT REL
  - MSP TYPE
  - EFF DT
  - AUX REC
  - ORIG CNTR (except when ACTION(S) = CV)
  - CHECK DATE, CHECK AMOUNT, CHECK NO (if SOURCE = CHEK)
  - INFMT NAME, STREET, CITY, ST, ZIP, INFMT REL (if SOURCE = CHEK or LTTR)

After you type data in one field, press [Tab] to move the cursor to the next field.

For information on screen scraping beneficiary information for CWF assistance requests, see page 2-19.

For information on selecting ECRS codes, see page 2-44.

3. Type data in the fields as required by the action code(s) requested and typed in the ACTION(S) field. The table below lists action codes and corresponding required fields not listed above.

Action Code	Required Fields
AI	INFMT NAME, STREET, CITY, ST, ZIP, INFMT REL (attorney information)
CV	CHANGE LEAD TO (new lead contractor number), SEND VENUE LETTER? Y/N (change of venue letter indicator)  <b>Note:</b> Only the original lead contractor or a CMS RO user has the capability to make a lead contractor reassignment request.
EA	EMPLR NAME
EI	EMPLR NAME, STREET, CITY, ST, ZIP, EIN, and EMPLOYEE NO (employer information)  <b>Note:</b> Type data in <i>all</i> fields to update employer information at CWF.
MX	SSN (Social Security Number)
TD	TERM DT (termination date)

- After typing data in all of the required fields, press [PF8]. The system displays the ECRS CWF Assistance Request Detail, Page 2 of 2 screen, as shown in the example below.

```

ECRS CWF ASSISTANCE REQUEST DETAIL                                PAGE 2 OF 2
CNTR NBR. 99999          BENE XXXXXXXXXXXXXXXXXXXX X XXXXXXXXXXXXXXXXXXXXXXXX
HICN XXXXXXXXXXXXX      DCN XXXXXXXXXXXXXXXXXXXXX

INSURER NAME: _____          INS TYPE:  _ XXXXXXXXXXXXXXXXXXXX
STREET: _____          PHONE:  _ - _ -
CITY: _____          ST:  _ ZIP:  _ -
GROUP NO: _____          POLICY NO: _____
POLICY HOLDER/SUBSCRIBER NAME: _____
PHP DATE: _____
REMARKS:  _ _ _          DIAG:  _ _ _ _ _

COMMENTS: CNTR: (OPERID) _____
          _____
          _____
          COB: (OPERID) _____
          _____
          _____

F2=MENU F3=RETURN F5=UPDATE F7=BWD F9=CODES F12=EXIT
    
```

- Type data in the INS TYPE field, the only required field on the ECRS CWF Assistance Request Detail, Page 2 of 2 screen.
- Type data in the fields as required by the action code(s) requested and typed in the ACTION(S) field on the ECRS CWF Assistance Request Detail, Page 1 of 2 screen. The table below lists action codes and corresponding required fields not mentioned above.

Action Code	Required Fields
II	<p>INSURER NAME</p> <p>If you leave the following fields blank, the system overwrites the previous value: STREET, CITY, ST, ZIP, GROUP NO, POLICY NO, INSURED NAME, INS REL.</p> <p><b>Note:</b> Type data in <i>all</i> fields to update insurer information at CWF. Leave <i>all</i> fields blank to delete insurer information at CWF.</p>
PH	PHP DATE (Pre-paid Health Plan date)
DX	DIAG (diagnosis codes) Enter at least one, but up to five.

- After typing data in all of the required fields, press [PF5]. The system adds or updates the transaction, then displays the message, "TRANSACTION COMPLETED SUCCESSFULLY."
- If you want to return to the ECRS CWF Assistance Request Detail, Page 1 of 2 screen, press [PF7].  
If you want to exit the ECRS CWF Assistance Request Detail screens, press [PF2] to return to the ECRS main menu or [PF12] to exit ECRS.

**ECRS CWF Assistance Request Detail, Page 1 of 2 Screen Description**

```

ECRS CWF ASSISTANCE REQUEST DETAIL                                PAGE 1 OF 2
CNTR NBR. 99999 PHONE: ___-___-___ USER ID XXXXXXXX ORIG DT: 99-99-9999
CNTR REP.: _____ STATUS XX XXXXXXXXXXXXXXXX
ACTION(S): _____ DCN: _____ REASON XX XXXXXXXXXXXXXXXX
ACTIVITY CODE: _____ SOURCE: _____ XXXXXXXXXXXXXXXX
BENE HICN: _____ SSN: ___-___-___ DOB: _____ SEX: _____
NAME: _____ PAT REL: _____ XXXXXXXXXXXXXXXX
MSP TYPE: _____ XXXXXXXXXXXXXXXX EFF DT: _____ TERM DT: _____
AUX REC: _____ ACCR DT: _____
ORIG CNTR: _____ CHANGE LEAD TO: _____ SEND VENUE LETTER? Y/N _____
BENE STRT: _____
CITY: _____ ST: _____ ZIP: _____-___-___ PHONE: _____-___-___

CHECK DATE: _____ CHECK AMOUNT: $____,____,____.____ CHECK NO: _____
INFMT NAME: _____ PHONE: _____-___-___
STREET: _____
CITY: _____ ST: _____ ZIP: _____-___-___ INFMT REL: _____ XXXXXXXXXXXXXXX

EMPLR NAME: _____ EIN: _____
STREET: _____ PHONE: _____-___-___
CITY: _____ ST: _____ ZIP: _____-___-___ EMPLOYEE NO: _____

F2=MENU F3=RETURN F6=COB/HIMR F8=FWD F9=CODES F12=EXIT
    
```

ECRS CWF Assistance Request Detail Screen, Page 1 of 2	
Field Name	Description
CNTR NBR.	<p><b>Medicare Contractors:</b> Contractor number entered on login screen (<i>protected field</i>)</p> <p><b>CMS Users:</b> RO contractor number entered on main menu screen (<i>protected field</i>)</p>
PHONE	Phone number of contractor representative
USER ID	User ID of operator who entered CWF assistance request transaction ( <i>protected field</i> )
ORIG DT	Originating date in MM-DD-CCYY format ( <i>protected field</i> )
CNTR REP.	Name of contractor representative to contact for further information or clarification regarding CWF assistance request
STATUS	<p>Two-character code explaining where CWF assistance request transaction is in the COB system process (<i>protected field</i>). Description of status code displays next to value. Valid values are:</p> <p>CM Completed                      DE Delete (do not process) ECRS CWF assistance request                      IP In process, being edited by COB                      NW New, not yet read by COB</p>

<b>ECSR CWF Assistance Request Detail Screen, Page 1 of 2</b>	
<b>Field Name</b>	<b>Description</b>
ACTION(S)	<p>Two-character code defining action to take on CWF Auxiliary record (<i>required field</i>). Valid values are:</p> <ul style="list-style-type: none"> <li>AI Change attorney information</li> <li>CV Change venue</li> <li>DE Develop to employer</li> <li>DI Develop to insurer</li> <li>DO Mark occurrence for deletion</li> <li>DR Investigate/redevelop closed or deleted record</li> <li>DX Change diagnosis codes</li> <li>EA Change employer address</li> <li>ED Change effective date</li> <li>EI Change employer information</li> <li>ES Employer size below minimum (20 for working aged, 100 for disability)</li> <li>II Change insurer information</li> <li>IT Change insurer type</li> <li>LR Add duplicate liability record</li> <li>MT Change MSP type</li> <li>MX SSN/HICN mismatch</li> <li>NR Add duplicate no-fault record</li> <li>PH Add PHP date</li> <li>PR Change patient relationship</li> <li>RR Generate right of recovery lead contractor letter</li> <li>TD Terminate open EGHP record with date less than six months prior to date of accretion</li> <li>VP Beneficiary has taken a vow of poverty</li> </ul> <p>Enter up to four action codes unless CWF assistance request is to change venue (CV), delete occurrence (DO), redevelop a deleted CWF record (DR), request a right of recovery lead contractor letter (RR), or note a vow of poverty (VP). You cannot combine these five action codes with any other action codes.</p>
DCN	Document Control Number assigned by contractor to correspondence and/or paperwork associated with transaction ( <i>required field</i> )

<b>ECRS CWF Assistance Request Detail Screen, Page 1 of 2</b>	
<b>Field Name</b>	<b>Description</b>
REASON	<p>Two-character code explaining why the CWF assistance request is in a particular status (<i>protected field</i>). Description of reason code displays next to value. Valid values are:</p> <ul style="list-style-type: none"> <li>01 Not yet read by COB, used with NW status</li> <li>02 Being processed by COB, used with IP status</li> <li>03 Under development by COB, used with IP status</li> <li>04 Update sent to CWF, used with IP status</li> <li>05 Error received from CWF, being resolved by COB contractor, used with IP status</li> <li>07 Auditor follow-up development in progress, used with IP status</li> <li>10 Not processing</li> <li>11 Not yet eligible for Medicare, used with HD status</li> <li>14 Duplicate request, development already in progress, used with HD status</li> <li>50 Posted to CWF, response received with no errors, used with CM status</li> <li>51 No changes (additions, modifications, or deletions) made to CWF, used with CM status</li> <li>52 Returned–rejected by CWF, used with CM status</li> <li>53 Returned–duplicate ECRS request, used with CM status</li> <li>54 100 or more threshold met</li> <li>55 20 or more threshold met</li> <li>56 OBRA does not apply, no update</li> <li>57 Record already updated</li> <li>58 Non-compliant GHP</li> <li>59 Employer verified existing record, no update</li> <li>60 Invalid HICN</li> <li>61 No Part A entitlement</li> <li>62 Closed, no response to development</li> <li>63 Development complete, no MSP</li> <li>64 Letter sent</li> <li>65 Deceased, used with CM status</li> <li>66 ESRD/DIB conflict</li> <li>67 No response from CWF</li> <li>68 Closed for Self-Report (More current information was received by the COB contractor in the form of a self-report. You will be notified of any changes in record status on the ECRS Changed Record Notification screen.)</li> <li>69 Developed to GHP, no response</li> <li>70 Developed to non-EGHP, no response</li> <li>71 Developed to beneficiary, no response</li> <li>72 Developed to informant, no response</li> <li>73 Medicare beneficiary retired</li> <li>74 Spouse retired</li> <li>75 GHP lifetime of yearly benefits past maximum amount</li> <li>76 No coverage with insurance company</li> <li>77 Medicare Supplemental Plan</li> <li>78 Employer has less than 20 employees</li> <li>79 Per employer, Medicare beneficiary is not covered under spouse’s GHP</li> </ul>

<b>ECRS CWF Assistance Request Detail Screen, Page 1 of 2</b>	
<b>Field Name</b>	<b>Description</b>
REASON (continued)	Two-character code explaining why the CWF assistance request is in a particular status ( <i>protected field</i> ). Description of reason code displays next to value. Valid values (continued from previous page) are:  80 Employer has less than 100 employees 81 Medicare is primary due to ESRD coordination period 82 Per insurance, seasonal employee and not eligible for the month 83 Incoming request conflicts with information on file 84 Insufficient information to update CWF 85 Venue changed 86 Unable to verify address, used with CM status 88 No update, not lead contractor
ACTIVITY CODE	Activity of contractor ( <i>required field</i> ). Valid values are:  C Claims (Pre-Payment) (22001) D Debt Collection/Referral (42021) G Group Health Plan (42003) I General Inquires (42004) N Liability, No Fault, Workers' Compensation, and Federal Tort Claim Act (42002)
SOURCE	Four-character code identifying source of CWF assistance request information ( <i>required field</i> ). Description of source code displays next to value. Valid values are:  CHEK Unsolicited check LTTR Letter PHON Phone call SCLM Claim submitted to Medicare contractor for secondary payment
BENE HICN	Health Insurance Claim Number of beneficiary ( <i>required field</i> ). Type HICN without dashes, spaces, or other special characters.
SSN	Social Security Number of beneficiary
DOB	Beneficiary's date of birth
SEX	Sex of beneficiary. Valid values are:  M Male F Female U Unknown
NAME	Name of beneficiary in first name/middle initial/last name format. First and last names are <i>required fields</i> .

<b>ECRS CWF Assistance Request Detail Screen, Page 1 of 2</b>	
<b>Field Name</b>	<b>Description</b>
PAT REL	<p>Patient relationship between policy holder and beneficiary (<i>required field</i>). Description of code displays next to value. Valid values are:</p> <ul style="list-style-type: none"> <li>01 Patient is policy holder</li> <li>02 Spouse</li> <li>03 Natural child, insured has financial responsibility</li> <li>04 Natural child, insured does not have financial responsibility</li> <li>05 Stepchild</li> <li>06 Foster child</li> <li>07 Ward of the Court</li> <li>08 Employee</li> <li>09 Unknown</li> <li>10 Handicapped dependent</li> <li>11 Organ donor</li> <li>12 Cadaver donor</li> <li>13 Grandchild</li> <li>14 Niece/nephew</li> <li>15 Injured plaintiff</li> <li>16 Sponsored dependent</li> <li>17 Minor dependent of a minor dependent</li> <li>18 Parent</li> <li>19 Grandparent dependent</li> <li>20 Not available</li> </ul>
MSP TYPE	<p>One-character code identifying type of MSP coverage (<i>required field</i>). Description of code displays next to value. Valid values are:</p> <ul style="list-style-type: none"> <li>A Working Aged</li> <li>B ESRD</li> <li>C Conditional Payment</li> <li>D Automobile Insurance, No Fault</li> <li>E Workers' Compensation</li> <li>F Federal (Public)</li> <li>G Disabled</li> <li>H Black Lung</li> <li>I Veterans</li> <li>L Liability</li> </ul>
EFF DT	Effective date of MSP coverage in MMDDCCYY format ( <i>required field</i> )
TERM DT	Termination date of MSP coverage in MMDDCCYY format. Type one or more zeroes in this field to remove an existing termination date. Type <b>9</b> eight times in this field if you have conflicting dates for the termination date.
AUX REC	Record number of MSP auxiliary occurrence in CWF ( <i>required field</i> )
ACCR DT	Accretion date of MSP coverage in MMDDCCYY format
ORIG CNTR	Contractor number of contractor that created original MSP occurrence at CWF ( <i>required field</i> except when ACTION(S) = CV)

<b>ECRS CWF Assistance Request Detail Screen, Page 1 of 2</b>	
<b>Field Name</b>	<b>Description</b>
CHANGE LEAD TO	New lead contractor number. <i>Required field</i> if value in ACTION(S) field = CV. Only the original lead contractor or a CMS RO user has the capability to make a lead contractor reassignment request.  <b>Note:</b> The system allows one change of venue per beneficiary. If you try to request a second or subsequent change of venue, the system displays an error message and does not process your request. In this case, contact your COB consortia representative.
SEND VENUE LETTER? Y/N	Indicates whether to send Change of Venue letter informing of lead contractor change to original recipients of Right of Recovery letter. <i>Required field</i> if value in ACTION(S) field = CV. Valid values are:  Y Yes, send Change of Venue letter N No, do not send Change of Venue letter
BENE STRT	First and second lines of beneficiary's street address
CITY	Beneficiary's city
ST	Beneficiary's state
ZIP	Beneficiary's ZIP code
PHONE	Beneficiary's telephone number
CHECK DATE	Date of check received. <i>Required field</i> if value in SOURCE field = CHEK. You cannot future-date this field.
CHECK AMOUNT	Amount of check received. <i>Required field</i> if value in SOURCE field = CHEK.
CHECK NO	Number of check received. <i>Required field</i> if value in SOURCE field = CHEK.
INFMT NAME	Name of person (in first name/middle initial/last name format) informing contractor of change in MSP coverage. First and last names are <i>required fields</i> when SOURCE is CHEK or LTTR.
PHONE	Informant's telephone number
STREET	First and second lines of informant's street address. First address line is a <i>required field</i> when SOURCE is CHEK or LTTR.
CITY	Informant's city. <i>Required field</i> when SOURCE is CHEK or LTTR.
ST	Informant's state. <i>Required field</i> when SOURCE is CHEK or LTTR.
ZIP	Informant's ZIP code. <i>Required field</i> when SOURCE is CHEK or LTTR.



<b>ECRS CWF Assistance Request Detail Screen, Page 1 of 2</b>	
<b>Field Name</b>	<b>Description</b>
INFMT REL	One-character code indicating relationship of informant to beneficiary. <i>Required field</i> when SOURCE is CHEK or LTTR. Description of code displays next to value. Valid values are: A Attorney representing beneficiary B Beneficiary C Child D Defendant's attorney E Employer F Father I Insurer M Mother N Non-relative O Other relative P Provider R Beneficiary representative (other than attorney) S Spouse U Unknown
EMPLR NAME	Name of employer providing group health insurance under which beneficiary is covered
EIN	Employer Identification Number
STREET	Employer's street address
PHONE	Employer's phone number
CITY	Employer's city
ST	Employer's state
ZIP	Employer's ZIP code
EMPLOYEE NO	Employee number of policy holder

**Transportation**

<b>ECRS CWF Assistance Request Detail Screen, Page 1 of 2</b>	
<b>PF Key</b>	<b>Function</b>
02	Return to ECRS main menu
03	Return to previous level
06	Request MSP and beneficiary data from CWF and COB database
08	Page forward to second page of screen
09	Transport to ECRS Code Selection screen
12	Exit ECRS

### ECRS CWF Assistance Request Detail, Page 2 of 2 Screen Description

ECRS CWF ASSISTANCE REQUEST DETAIL		PAGE 2 OF 2
CNTR NBR. 99999	BENE XXXXXXXXXXXXXXXX X XXXXXXXXXXXXXXXXXXXXXXXX	
HICN XXXXXXXXXXXXXXXX	DCN XXXXXXXXXXXXXXXX	
INSURER NAME: _____	INS TYPE: _____	XXXXXXXXXXXXXXXXXXXX
STREET: _____	PHONE: _____	_____
CITY: _____ ST: _____ ZIP: _____		
GROUP NO: _____	POLICY NO: _____	
POLICY HOLDER/SUBSCRIBER NAME: _____		
PHP DATE: _____		
REMARKS: _____	DIAG: _____	
COMMENTS: CNTR: (OPERID) _____		
_____		
_____		
COB: (OPERID) _____		
_____		
_____		
F2=MENU F3=RETURN F5=UPDATE F7=BWD F9=CODES F12=EXIT		

ECRS CWF Assistance Request Detail Screen, Page 2 of 2	
Field Name	Description
CNTR NBR.	<b>Medicare Contractors:</b> Contractor number entered on login screen ( <i>protected field</i> ) <b>CMS Users:</b> RO contractor number entered on main menu screen ( <i>protected field</i> )
BENE	Name of beneficiary in first name/middle initial/last name format ( <i>protected field</i> )
HICN	Health Insurance Claim Number for beneficiary ( <i>protected field</i> )
DCN	Document Control Number assigned by contractor to correspondence and/or paperwork associated with this transaction ( <i>protected field</i> )
INSURER NAME*	Name of insurance carrier for MSP coverage ( <i>required field</i> for II action code)

\* The following entries are *not* permitted in this field: ATTORNEY, BC, BCBX, BLUE CROSS, BLUE SHIELD, BS, BX, CMS, HCFA, INSURER, MEDICARE, MISC, MISCELLANEOUS, N/A, NA, NO, NONE, SUPPLEMENT, SUPPLEMENTAL, UNK, and UNKNOWN.

<b>ECRS CWF Assistance Request Detail Screen, Page 2 of 2</b>	
<b>Field Name</b>	<b>Description</b>
INS TYPE	One-character code for type of insurance. Valid values are: A Insurance or Indemnity (OTHER TYPES) B Group Health Organization (GHO) C Preferred Provider Organization (PPO) D Third Party Administrator arrangement under an Administrative Service Only (ASO) contract without stop loss from any entity (TPA/ASO) E Third Party Administrator arrangement with stop loss insurance issued from any entity (STOP LOSS TPA) F Self-Insured/Self-Administered (SELF-INSURED) G Collectively-Bargained Health and Welfare Fund (HEALTH/WELFAR) H Multiple Employer Health Plan with at least one employer who has more than 100 full- and/or part-time employees (EMPLOYER+100) I Multiple Employer Health Plan with at least one employer who has more than 20 full- and/or part-time employees (EMPLOYER+20) J Hospitalization Only Plan covering inpatient hospital services (HOSPITAL ONLY) K Medical Services Only Plan covering only non-inpatient medical services (MEDICAL ONLY) M Medicare Supplemental Plan, Medigap, Medicare Wraparound Plan or Medicare Carve Out Plan (SUPPLEMENTAL) Blank Unknown (UNKNOWN)
STREET	First and second lines of insurer's street address
PHONE	Insurer's phone number
CITY	Insurer's city
ST	Insurer's state
ZIP	Insurer's ZIP code
GROUP NO	Group number of insurance coverage
POLICY NO	Policy number of insurance coverage
POLICY HOLDER/SUBSCRIBER NAME	Name of individual covered by this insurance in first name/middle initial/last name format
PHP DATE	Pre-paid Health Plan date in MMDDCCYY
REMARKS	Two-character CWF remark code explaining reason for transaction. Enter up to three remark codes.
DIAG	Five-digit diagnosis code that applies to this MSP occurrence. Enter up to five diagnosis codes.

<b>ECRS CWF Assistance Request Detail Screen, Page 2 of 2</b>	
<b>Field Name</b>	<b>Description</b>
<i>COMMENTS</i>	
CNTR	Identification number of updating operator (OPERID) precedes a free-form text field, where Medicare contractors type data to send notes to the COB contractor. <i>Protected field</i> when COB contractor adds a comment.  <b>Note:</b> The COB contractor reviews these comments unless the request involves an automated action type (action codes DO, PH, RR, and TD). In these cases, when automated action types are submitted individually and processed successfully, the comments entered are not reviewed.
COB	Identification number of updating operator (OPERID) precedes a free-form text field, where the COB contractor's comments on the Medicare contractor or the last comment added in CARS appear. <i>Protected field</i> when Medicare contractor adds a comment.

### Transportation

<b>ECRS CWF Assistance Request Detail Screen, Page 2 of 2</b>	
<b>PF Key</b>	<b>Function</b>
02	Return to ECRS main menu
03	Return to previous level
05	Add/update assistance request
07	Page backward to first page of screen
09	Transport to ECRS Code Selection screen
12	Exit ECRS

## Screen Scraping Beneficiary Information for CWF Assistance Requests

Screen scraping allows you to retrieve beneficiary information from the COB database and the HIMR BENA and MSPD screens at each host site. The system then carries that information forward to the ECRS CWF Assistance Request Detail screens and fills in the associated fields with the appropriate information.

Follow the steps below to screen scrape beneficiary information for a CWF assistance request.

1. From the first page of the ECRS CWF Assistance Request Detail screen, type a HICN in the BENE HICN field and press [PF6]. The system searches the COB database and HIMR. When the system retrieves MSP data from HIMR, it displays the HIMR MSP Data screen, as shown in the example below.

```

                                HIMR MSP DATA
HIC  XXXXXXXXXXXX                DOB MM/DD/CCYY  SEX X
CORR XXXXXXXXXXXX                NAME XXXXXXXX.XXXXXXXXXXXXXX  DOD          SOURCE X

SL REC  MSP  EFF DTE      TRM DTE      VAL DEL  ORIG  UPDT  DOA
      001  X   MM/DD/CCYY  MM/DD/CCYY  X      XXXXX XXXXX MM/DD/CCYY
_    002  X   MM/DD/CCYY  MM/DD/CCYY  X      XXXXX XXXXX MM/DD/CCYY

ENTER G IN THE SELECT FIELD TO RETURN DATA
F3=RETURN
    
```

- 2.

If you want to...	Follow these steps:
"Grab" a beneficiary's data and carry it back to the ECRS CWF Assistance Request Detail screens	Type <b>G</b> in the SL field next to that record, and then press [Enter].
Return to the ECRS CWF Assistance Request Detail screen without "grabbing" data	Press [PF3].

The system returns to the first page of the ECRS CWF Assistance Request Detail screen.

If you chose to “grab” data, the system highlights the fields where information was imported from the COB database and CWF, as shown in the examples below.

```

ECRS CWF ASSISTANCE REQUEST DETAIL                                PAGE 1 OF 2
CNTR NBR. 99999 PHONE: ___-___-___ USER ID XXXXXXXX ORIG DT: 99-99-9999
CNTR REP.: _____ STATUS XX XXXXXXXXXXXXXXXX
ACTION(S): _____ DCN: _____ REASON XX XXXXXXXXXXXXXXXX
ACTIVITY CODE: _____ SOURCE: _____ XXXXXXXXXXXXXXXX
BENE HICN: XXXXXXXXXXXXXXXX SSN: ___-___-___ DOB: MMDDCCYY SEX: X
NAME: _____ PAT REL: XX XXXXXXXXXXXXXXXX
MSP TYPE: X XXXXXXXXXXXXXXXX EFF DT: MMDDCCYY TERM DT: MMDDCCYY
AUX REC: XXX ACCR DT: MMDDCCYY
ORIG CNTR: XXXXX CHANGE LEAD TO: _____ SEND VENUE LETTER? Y/N _
BENE STRT: XXXXXXXXXXXXXXXX XXXXXXXXXXXXXXXX
CITY: XXXXXXXXXXXXXXXX ST: XX ZIP: XXXXX-XXXX PHONE: XXX-XXX-XXXX

CHECK DATE: _____ CHECK AMOUNT: $ __, __, __. __ CHECK NO: _____
INFMT NAME: _____ PHONE: ___-___-___
STREET: _____
CITY: _____ ST: __ ZIP: _____ INFMT REL: __ XXXXXXXXXXXX

EMPLR NAME: XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX EIN: XXXXXXXXX
STREET: XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX PHONE: ___-___-___
CITY: XXXXXXXXXXXXXXXX ST: XX ZIP: XXXXX-XXXX EMPLOYEE NO: _____

F2=MENU F3=RETURN F6=COB/HIMR F8=FWD F9=CODES F12=EXIT
    
```

```

ECRS CWF ASSISTANCE REQUEST DETAIL                                PAGE 2 OF 2
CNTR NBR. 99999 BENE XXXXXXXXXXXXXXXX X XXXXXXXXXXXXXXXX
HICN XXXXXXXXXXXXXXXX DCN XXXXXXXXXXXXXXXX

INSURER NAME: XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX INS TYPE: X XXXXXXXXXXXXXXXX
STREET: XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX XXXXXXXXXXXXXXXX PHONE: ___-___-___
CITY: XXXXXXXXXXXXXXXX ST: XX ZIP: XXXXX-XXXX
GROUP NO: XXXXXXXXXXXXXXXX POLICY NO: XXXXXXXXXXXXXXXX
POLICY HOLDER/SUBSCRIBER NAME: XXXXXXXXXXXXXXXX X XXXXXXXXXXXXXXXX
PHP DATE: MMDDCCYY
REMARKS: XX XX XX DIAG: XXXXX XXXXX XXXXX XXXXX XXXXX

COMMENTS: CNTR: (OPERID) _____
_____
_____
COB: (OPERID) _____
_____
_____

F2=MENU F3=RETURN F5=UPDATE F7=BWD F9=CODES F12=EXIT
    
```

3.

If you...	Follow these steps:
Want to use this imported information	<ol style="list-style-type: none"> <li>1. Change information in any of the highlighted fields by typing the correct information over the imported information.</li> <li>2. Press [PF8] to display the second page of the screen. Press [PF7] if you need to display the first page of the screen again.</li> <li>3. After you complete both pages of the screen, press [PF5] on the second page to update the database.</li> </ol>
Want to use this beneficiary, but you want to “grab” a different MSP record for the beneficiary	Press [PF6] again. The system displays the HIMR MSP Data screen.
Do not want to use this imported information, but want to look up a new beneficiary	<ol style="list-style-type: none"> <li>1. Type the new beneficiary’s HICN in the BENE HICN field on the first page.</li> <li>2. Press [PF6] on the first page to overlay applicable fields with information from the new beneficiary’s record.</li> </ol>

### HIMR MSP Data Screen Description

```

HIMR MSP DATA

HIC  XXXXXXXXXXXX          DOB MM/DD/CCYY  SEX X
CORR XXXXXXXXXXXX      NAME XXXXXXXX.XXXXXXXXXXXXXX  DOD          SOURCE X

          VAL DEL  ORIG  UPDT
SL REC  MSP  EFF DTE  TRM DTE  IND  CONTRACTOR  DOA
-  001   X  MM/DD/CCYY  MM/DD/CCYY  X  XXXXX  XXXXX  MM/DD/CCYY
-  002   X  MM/DD/CCYY  MM/DD/CCYY  X  XXXXX  XXXXX  MM/DD/CCYY

ENTER G IN THE SELECT FIELD TO RETURN DATA
F3=RETURN
    
```

<b>HIMR MSP Data Screen</b>	
<b>Field Name</b>	<b>Description</b>
HIC	Beneficiary’s HICN ( <i>protected field</i> )
DOB	Beneficiary’s Date of Birth in MMDDCCYY format ( <i>protected field</i> )

<b>HIMR MSP Data Screen</b>	
<b>Field Name</b>	<b>Description</b>
SEX	Beneficiary's sex ( <i>protected field</i> ). Valid values are: F Female M Male
CORR	Corrected HICN ( <i>protected field</i> )
NAME	Beneficiary's first name (up to seven characters) and last name (up to 11 characters), separated by a period ( <i>protected field</i> )
DOD	Date of death ( <i>protected field</i> )
SOURCE	Source code ( <i>protected field</i> ). Valid values are CMS-defined values received from HIMR.
SL	Selection field. Type <b>G</b> in the appropriate selection field and press [Enter] to "grab" a beneficiary's data and carry it forward to the ECRS CWF Assistance Request Detail screens.
REC	Sequence number of record ( <i>protected field</i> )
MSP	One-character code identifying type of MSP coverage ( <i>protected field</i> ). Valid values are: A Working Aged B ESRD C Conditional Payment D Automobile Insurance, No Fault E Workers' Compensation F Federal (Public Health) G Disabled H Black Lung I Veterans L Liability
EFF DTE	Effective date of MSP coverage in MM/DD/CCYY format ( <i>protected field</i> )
TRM DTE	Termination date of MSP coverage in MM/DD/CCYY format ( <i>protected field</i> )
VAL DEL IND	Validity indicator ( <i>protected field</i> ). The system only displays records with validity indicator Y on this screen.
ORIG CONTRACTOR	Originating contractor number ( <i>protected field</i> )
UPDT CONTRACTOR	Contractor number of contractor who last updated correspondence item ( <i>protected field</i> )
DOA	Date of accretion in MM/DD/CCYY format ( <i>protected field</i> )

### Transportation

<b>HIMR MSP Data Screen</b>	
<b>PF Key</b>	<b>Function</b>
03	Return to previous level



## Deleting a CWF Assistance Request Transaction

Follow the steps below to delete a new (status NW) CWF assistance request transaction before it is processed by COB. If the COB system has started processing your request, you cannot delete it.

- From the COB ECRS main menu screen, type **02** in the SELECTION field, and type the search criteria in the appropriate fields. Press [Enter]. The system displays the ECRS CWF Assistance Request List screen, as shown in the example below.

ECRS CWF ASSISTANCE REQUEST LIST								
USER ID: _____	STATUS: ___	REASON: ___						
ORIGIN DATE FROM: _____	THROUGH: _____	CNTR NBR: _____	HICN: _____					
DCN: _____								
SEL	HICN	CNTR	DCN	ST	RS	ORGIN DT	LST UPDATE	USER ID
-	XXXXXXXXXXXXXX	XXXXX	XXXXXXXXXXXXXXXXXXXX	XX	XX	99-99-9999	99-99-9999	XXXXXXXXXX
-	XXXXXXXXXXXXXX	XXXXX	XXXXXXXXXXXXXXXXXXXX	XX	XX	99-99-9999	99-99-9999	XXXXXXXXXX
-	XXXXXXXXXXXXXX	XXXXX	XXXXXXXXXXXXXXXXXXXX	XX	XX	99-99-9999	99-99-9999	XXXXXXXXXX
-	XXXXXXXXXXXXXX	XXXXX	XXXXXXXXXXXXXXXXXXXX	XX	XX	99-99-9999	99-99-9999	XXXXXXXXXX
-	XXXXXXXXXXXXXX	XXXXX	XXXXXXXXXXXXXXXXXXXX	XX	XX	99-99-9999	99-99-9999	XXXXXXXXXX
-	XXXXXXXXXXXXXX	XXXXX	XXXXXXXXXXXXXXXXXXXX	XX	XX	99-99-9999	99-99-9999	XXXXXXXXXX
-	XXXXXXXXXXXXXX	XXXXX	XXXXXXXXXXXXXXXXXXXX	XX	XX	99-99-9999	99-99-9999	XXXXXXXXXX
-	XXXXXXXXXXXXXX	XXXXX	XXXXXXXXXXXXXXXXXXXX	XX	XX	99-99-9999	99-99-9999	XXXXXXXXXX
-	XXXXXXXXXXXXXX	XXXXX	XXXXXXXXXXXXXXXXXXXX	XX	XX	99-99-9999	99-99-9999	XXXXXXXXXX
-	XXXXXXXXXXXXXX	XXXXX	XXXXXXXXXXXXXXXXXXXX	XX	XX	99-99-9999	99-99-9999	XXXXXXXXXX
-	XXXXXXXXXXXXXX	XXXXX	XXXXXXXXXXXXXXXXXXXX	XX	XX	99-99-9999	99-99-9999	XXXXXXXXXX
-	XXXXXXXXXXXXXX	XXXXX	XXXXXXXXXXXXXXXXXXXX	XX	XX	99-99-9999	99-99-9999	XXXXXXXXXX
-	XXXXXXXXXXXXXX	XXXXX	XXXXXXXXXXXXXXXXXXXX	XX	XX	99-99-9999	99-99-9999	XXXXXXXXXX
-	XXXXXXXXXXXXXX	XXXXX	XXXXXXXXXXXXXXXXXXXX	XX	XX	99-99-9999	99-99-9999	XXXXXXXXXX
-	XXXXXXXXXXXXXX	XXXXX	XXXXXXXXXXXXXXXXXXXX	XX	XX	99-99-9999	99-99-9999	XXXXXXXXXX

ENTER S IN SEL FIELD TO VIEW DETAILED INFO FOR THE TRANSACTION OR D TO DELETE

F2=MENU F3=RETURN F5=UPDATE F7=BWD F8=FWD F12=EXIT

- You can change or delete the search criteria to initiate a new search. You can perform searches using the following criteria:

Contractor Number, HICN, User ID, Status, Reason, DCN, Origin Date From, and Through in any combination except you cannot combine DCN and HICN searches. In addition, you must combine searches on Origin Date From and/or Through, User ID, Status, and Reason with a DCN, HICN or Contractor Number search.

The dates in the ORIGIN DATE FROM and THROUGH fields default to the dates entered in the SEARCH ORIGIN DATE fields on the COB ECRS main menu screen. If you did not enter dates in those fields on the COB ECRS main menu screen, the fields on this screen default to the date 30 days prior to the current date and the current date.

Typing information in the appropriate fields and pressing [Enter] narrows or widens your search.

- Press [PF7] to scroll backward or [PF8] to scroll forward through the list to find the CWF assistance request transaction you want to delete.
- Type **D** in the SEL field next to new (status NW) CWF assistance request transaction you want to delete. Press [Enter]. The system marks the assistance request transaction for deletion.
- If you want to exit the ECRS CWF Assistance Request List screen, press [PF2] to return to the ECRS main menu without retaining current search criteria, [PF3] to return to the ECRS main menu while retaining current search criteria, or [PF12] to exit ECRS.

**Note:** For the ECRS CWF Assistance Request List Screen Description, see page 2-4.

## Viewing the List of MSP Inquiry Transactions

Follow the steps below to view the list of MSP inquiry transactions.

- From the COB ECRS main menu screen, type **05** in the SELECTION field, and type the search criteria in the appropriate fields. Press [Enter]. The system displays the ECRS MSP Inquiry List screen, as shown in the example below.

```

ECRS MSP INQUIRY LIST
USER ID: _____ STATUS: __ REASON: __
ORIGIN DATE FROM: _____ THROUGH: _____ CNTR NBR: _____ HICN: _____
DCN: _____

SEL HICN          CNTR  DCN          ST RS  ORGIN DT  LST UPDATE  USER ID
-  XXXXXXXXXXXX  XXXXX  XXXXXXXXXXXX  XX XX  99-99-9999  99-99-9999  XXXXXXXX
-  XXXXXXXXXXXX  XXXXX  XXXXXXXXXXXX  XX XX  99-99-9999  99-99-9999  XXXXXXXX
-  XXXXXXXXXXXX  XXXXX  XXXXXXXXXXXX  XX XX  99-99-9999  99-99-9999  XXXXXXXX
-  XXXXXXXXXXXX  XXXXX  XXXXXXXXXXXX  XX XX  99-99-9999  99-99-9999  XXXXXXXX
-  XXXXXXXXXXXX  XXXXX  XXXXXXXXXXXX  XX XX  99-99-9999  99-99-9999  XXXXXXXX
-  XXXXXXXXXXXX  XXXXX  XXXXXXXXXXXX  XX XX  99-99-9999  99-99-9999  XXXXXXXX
-  XXXXXXXXXXXX  XXXXX  XXXXXXXXXXXX  XX XX  99-99-9999  99-99-9999  XXXXXXXX
-  XXXXXXXXXXXX  XXXXX  XXXXXXXXXXXX  XX XX  99-99-9999  99-99-9999  XXXXXXXX
-  XXXXXXXXXXXX  XXXXX  XXXXXXXXXXXX  XX XX  99-99-9999  99-99-9999  XXXXXXXX
-  XXXXXXXXXXXX  XXXXX  XXXXXXXXXXXX  XX XX  99-99-9999  99-99-9999  XXXXXXXX
-  XXXXXXXXXXXX  XXXXX  XXXXXXXXXXXX  XX XX  99-99-9999  99-99-9999  XXXXXXXX
-  XXXXXXXXXXXX  XXXXX  XXXXXXXXXXXX  XX XX  99-99-9999  99-99-9999  XXXXXXXX
-  XXXXXXXXXXXX  XXXXX  XXXXXXXXXXXX  XX XX  99-99-9999  99-99-9999  XXXXXXXX
-  XXXXXXXXXXXX  XXXXX  XXXXXXXXXXXX  XX XX  99-99-9999  99-99-9999  XXXXXXXX
-  XXXXXXXXXXXX  XXXXX  XXXXXXXXXXXX  XX XX  99-99-9999  99-99-9999  XXXXXXXX
-  XXXXXXXXXXXX  XXXXX  XXXXXXXXXXXX  XX XX  99-99-9999  99-99-9999  XXXXXXXX

ENTER S TO VIEW DETAILED INFO, D TO DELETE, OR R TO CHANGE AN INQUIRY TO A REQUEST
F2=MENU F3=RETURN F5=UPDATE F7=BWD F8=FWD F12=EXIT

```

- From this screen, you can change or delete the search criteria to initiate a new search. You can perform searches using the following criteria:

Contractor Number, HICN, User ID, Status, Reason, DCN, Origin Date From, and Through in any combination except you cannot combine DCN and HICN searches. In addition, you must combine searches on Origin Date From and/or Through, User ID, Status, and Reason with a DCN, HICN or Contractor Number search.

The dates in the ORIGIN DATE FROM and THROUGH fields default to the dates entered in the SEARCH ORIGIN DATE fields on the COB ECRS main menu screen. If you did not enter dates in those fields on the COB ECRS main menu screen, the fields on this screen default to the date 30 days prior to the current date and the current date.

To search for all MSP inquiries related to a specific beneficiary, type that beneficiary's HICN in the HICN field and press [Enter]. The system displays all MSP inquiries for that beneficiary.

Typing information in the appropriate fields and pressing [Enter] narrows or widens your search.

- Press [PF7] to scroll backward or [PF8] to scroll forward through the list of MSP inquiry transactions.
- If you want to view detailed information for an MSP inquiry transaction, type **S** in the SEL field next to the transaction for which you want to view detailed information. Press [Enter]. The system displays the first page of the ECRS MSP Inquiry Detail screen for the selected transaction.

- If an MSP inquiry is rejected with reason code 87 and you want to log a CWF assistance request for it, type **R** in the SEL field next to the appropriate transaction and press [Enter]. The system displays the first page of the ECRS CWF Assistance Request Detail screen for the selected transaction with the information from the inquiry carried forward into the applicable fields.

Type the appropriate information in the required ACTION(S), AUX REC, and ORIG CNTR fields, as well as any other fields that are needed to complete the request.

Press [P8] to display the second page of the screen. Type information in the appropriate fields.

Press [PF5] to save the assistance request. The system updates the assistance request and saves the original MSP inquiry in its history.

- If you want to exit the ECRS MSP Inquiry List screen, press [PF2] to return to the ECRS main menu without retaining current search criteria, [PF3] to return to the ECRS main menu while retaining current search criteria, or [PF12] to exit ECRS.

### ECRS MSP Inquiry List Screen Description

<b>ECRS MSP Inquiry List Screen</b>	
<b>Field Name</b>	<b>Description</b>
USER ID	User ID entered as search criteria, if applicable. This field is updateable; enter a different User ID to perform additional searches.
STATUS	Status code entered as search criteria, if applicable. This field is updateable; enter a different status code to perform additional searches. To view all in-process MSP inquiry transactions, type <b>IP</b> in the STATUS field and press [Enter].
REASON	Reason code entered as search criteria, if applicable. This field is updateable; enter a different reason code to perform additional searches.
ORIGIN DATE FROM	Starting date of date range entered as search criteria, if applicable. This field is updateable; enter a different From date in MMDDCCYY format to perform additional searches.
THROUGH	Ending date of date range entered as search criteria, if applicable. This field is updateable; enter a different Through date in MMDDCCYY format to perform additional searches.
CNTR NBR	Type a CMS-issued Medicare contractor number or your RO contractor number to view MSP inquiry transactions for a specific contractor or your Regional Office.
HICN	Health Insurance Claim Number entered as search criteria, if applicable. This field is updateable; enter a different HICN to perform additional searches.
DCN	Medicare contractor-assigned Document Control Number entered as search criteria, if applicable. This field is updateable; enter a different DCN to perform additional searches.

<b>ECRS MSP Inquiry List Screen</b>	
<b>Field Name</b>	<b>Description</b>
SEL	Selection field. Type <b>S</b> in this field and press [Enter] to transport to the ECRS MSP Inquiry Detail screen. Type <b>R</b> in this field and press [Enter] to transport to the ECRS CWF Assistance Request Detail screen. Type <b>D</b> in this field and press [PF5] to mark a new (status NW) MSP inquiry transaction for deletion.
HICN	Health Insurance Claim Number for MSP inquiry transaction ( <i>protected field</i> )
CNTR	Contractor number ( <i>protected field</i> )
DCN	Document Control Number assigned to MSP inquiry transaction by Medicare contractor ( <i>protected field</i> )
ST	Status of MSP inquiry transaction ( <i>protected field</i> ). For a list of valid status values, see page 2-31.
RS	Reason of MSP inquiry transaction ( <i>protected field</i> ). For a list of valid reason values, see page 2-33.
ORGIN DT	Originating date in MM-DD-CCYY format ( <i>protected field</i> )
LST UPDATE	Date MSP inquiry transaction was last changed in MMDDCCYY format ( <i>protected field</i> )
USER ID	User ID of operator who entered MSP inquiry transaction ( <i>protected field</i> )

### Transportation

<b>ECRS MSP Inquiry List Screen</b>	
<b>PF Key</b>	<b>Function</b>
02	Return to ECRS main menu, current search criteria is not retained
03	Return to ECRS main menu, current search criteria is retained
05	Mark MSP inquiry transactions that have <b>D</b> in the SEL field for deletion
07	Scroll backward
08	Scroll forward
12	Exit ECRS

## Adding, Viewing, and Updating MSP Inquiry Transactions

Use the ECRS MSP Inquiry Detail screens to add, view, and update an ECRS MSP inquiry transaction. You can only update an MSP inquiry transaction if it is in NW (new) status. If the COB system has started processing the information, you cannot update the transaction.

**Note:** Use these screens to submit an MSP inquiry to forward information to the COB contractor about a possible MSP situation not yet documented at CWF. If you want to enter CWF assistance request transactions for changes to existing CWF MSP auxiliary occurrences, use the ECRS CWF Assistance Request Detail screens (see page 2-6).

Common sources that provide contractors with MSP information, followed by the associated Source Code, are:

- Letters from beneficiaries or other informants (LTTR)
- Phone calls (PHON)
- Checks (CHEK)
- Secondary claims (SCLM)

Follow the steps below to add, view, or update an ECRS MSP inquiry transaction.

1. From the COB ECRS main menu screen, type **04** in the SELECTION field and press [Enter]. The system displays the first page of the ECRS MSP Inquiry Detail screen, as shown in the example below.

ECRS MSP INQUIRY DETAIL PAGE 1 OF 2

CNTR NBR. 99999 PHONE: \_\_\_ - \_\_\_ - \_\_\_ USER ID XXXXXXXX ORIG DT: 99-99-9999

CNTR REP.: \_\_\_\_\_ STATUS XX XXXXXXXXXXXXXXXX

ACTION(S): \_\_\_\_\_ DCN: \_\_\_\_\_ REASON XX XXXXXXXXXXXXXXXX

ACTIVITY CODE: \_\_\_\_\_ SOURCE: \_\_\_\_\_ XXXXXXXXXXXXXXXX

BENE HICN: \_\_\_\_\_ SSN: \_\_\_ - \_\_\_ - \_\_\_ DOB: \_\_\_\_\_ SEX: \_\_\_\_\_

NAME: \_\_\_\_\_ PAT REL: \_\_\_ XXXXXXXXXXXXXXXX

MSP TYPE: \_\_\_\_\_ XXXXXXXXXXXXXXXX EFF DT: \_\_\_\_\_ TERM DT: \_\_\_\_\_

SEND TO CWF? (Y/N) \_ CA \_

BENE STRT: \_\_\_\_\_

CITY: \_\_\_\_\_ ST: \_\_\_ ZIP: \_\_\_\_\_ - \_\_\_\_\_ PHONE: \_\_\_ - \_\_\_ - \_\_\_\_\_

CHECK DATE: \_\_\_\_\_ CHECK AMOUNT: \$\_\_\_\_,\_\_\_\_,\_\_\_\_.\_\_\_\_ CHECK NO: \_\_\_\_\_

INFMT NAME: \_\_\_\_\_ PHONE: \_\_\_ - \_\_\_ - \_\_\_\_\_

ADDR: \_\_\_\_\_

CITY: \_\_\_\_\_ ST: \_\_\_ ZIP: \_\_\_\_\_ - \_\_\_\_\_ INFMT REL: \_\_\_ XXXXXXXXXXXXXXXX

EMPLR NAME: \_\_\_\_\_ EIN: \_\_\_\_\_

STREET: \_\_\_\_\_ PHONE: \_\_\_ - \_\_\_ - \_\_\_\_\_

CITY: \_\_\_\_\_ ST: \_\_\_ ZIP: \_\_\_\_\_ - \_\_\_\_\_ EMPLOYEE NO: \_\_\_\_\_

F2=MENU F3=RETURN F6=COB/HIMR F8=FWD F9=CODES F12=EXIT

For information on screen scraping beneficiary information for MSP inquiries, see page 2-41.

For information on selecting ECRS codes, see page 2-44.

2. If you type action code(s) in the ACTION(S) field on the ECRS MSP Inquiry Detail, Page 1 of 2 screen, you must type data in the fields required by those action code(s). The table below lists applicable action codes, related special processing, and corresponding required fields on this screen and the next screen.

**Note:** Action codes are *not required* for MSP inquiries.

After you type data in one field, press [Tab] to move the cursor to the next field.

Action Code	Special Processing	Required Fields
CA	This action code assigns the designated lead contractor according to the type of class action suit. The system displays the following message: "IF YOU WANT TO SUPPRESS THE RIGHT OF RECOVERY LETTERS, ENTER ACTION CODE 'SR.'" The system does not send the beneficiary an MSP confirmation letter.	<p><b>Page 1:</b> BENE HICN, PAT REL, MSP TYPE (must = L), EFF DT, CA, **INFMT (attorney) NAME, STREET, CITY, ST, ZIP</p> <p><b>Page 2:</b> *INSURER NAME, *INS TYPE, **STREET, CITY, ST, ZIP, DIAG</p>
CL	<p><b>Note:</b> This action code is only valid for closed and settled liability, workers' compensation, and/or auto/no fault cases.</p> <p>This action code suppresses lead contractor assignment and the sending of Right of Recovery Letters. The system does not send the beneficiary an MSP confirmation letter.</p>	<p><b>Page 1:</b> BENE HICN, PAT REL, MSP TYPE (must = D, E, or L), EFF DT, TERM DT, **INFMT (attorney) NAME, STREET, CITY, ST, ZIP</p> <p><b>Page 2:</b> *INSURER NAME, *INS TYPE, **STREET, CITY, ST, ZIP, DIAG</p>
DE	This action code sends a development letter to the employer.	<p><b>Page 1:</b> EMPLR NAME, STREET, CITY, ST, ZIP</p> <p><b>Page 2:</b> N/A</p>
DI	This action code sends a development letter to the insurer.	<p><b>Page 1:</b> N/A</p> <p><b>Page 2:</b> INSURER NAME, STREET, CITY, ST, ZIP</p>
SC	<p>This action code suppresses the sending of confirmation letters for EGHP MSP Types. The system automatically suppresses a confirmation letter to the beneficiary if there is enough information on the inquiry to post a record at CWF for non-EGHP cases. By suppressing the confirmation letter, the beneficiary only receives the Right of Recovery letter after the record is posted at CWF.</p> <p><b>Note:</b> For MSP Types other than D, E, or L, the informant <i>must</i> be the beneficiary.</p>	<p><b>Page 1:</b> BENE HICN, PAT REL, MSP TYPE, EFF DT, **INFMT (attorney) NAME, STREET, CITY, ST, ZIP</p> <p><b>Page 2:</b> *INSURER NAME, *INS TYPE, **STREET, CITY, ST, ZIP, DIAG</p>

\* INSURER NAME and INS TYPE are always required fields.

\*\* Attorney information is only required when additional insurer information (STREET, CITY, ST, ZIP) is not present. Likewise, additional insurer information is only required when attorney information is not present.

Action Code	Special Processing	Required Fields
SL	This action code suppresses lead contractor assignment and the sending of Right of Recovery Letters. The system does not send the beneficiary an MSP confirmation letter.	<b>Page 1:</b> BENE HICN, PAT REL, MSP TYPE (must = D, E, or L), EFF DT, **INFMT (attorney) NAME, STREET, CITY, ST, ZIP <b>Page 2:</b> *INSURER NAME, *INS TYPE, **STREET, CITY, ST, ZIP, DIAG
SR	This action code suppresses the sending of Right of Recovery Letters. The system does not send the beneficiary an MSP confirmation letter.	<b>Page 1:</b> BENE HICN, PAT REL, MSP TYPE (must = D, E, or L), EFF DT, **INFMT (attorney) NAME, STREET, CITY, ST, ZIP <b>Page 2:</b> *INSURER NAME, *INS TYPE, **STREET, CITY, ST, ZIP, DIAG

**Action Code Compatibility**

You can combine the following three groups of action codes to use simultaneously: CA and CL, CA and SL, CA and SR. You cannot combine any of the other action codes listed in the previous chart.

3. Type a valid code in the ACTIVITY CODE field.
4. Type data in the fields required by the code typed in the SOURCE field on the ECRS MSP Inquiry Detail, Page 1 of 2 screen. The table below lists codes and corresponding required fields.

After you type data in one field, press [Tab] to move the cursor to the next field.

SOURCE Code	Required Fields
CHEK	DCN, SOURCE, BENE HICN, NAME, CHECK DATE, CHECK AMOUNT, CHECK NO, INFMT NAME, ADDR, CITY, ST, ZIP, INFMT REL or DCN, SOURCE, SSN, NAME, BENE STRT, CITY, ST, ZIP, CHECK DATE, CHECK AMOUNT, CHECK NO, INFMT NAME, ADDR, CITY, ST, ZIP, INFMT REL
LTTR	DCN, SOURCE, BENE HICN, NAME, INFMT NAME, ADDR, CITY, ST, ZIP, INFMT REL or DCN, SOURCE, SSN, NAME, BENE STRT, CITY, ST, ZIP, INFMT NAME, ADDR, CITY, ST, ZIP, INFMT REL

\* INSURER NAME and INS TYPE are always required fields.

\*\* Attorney information is only required when additional insurer information (STREET, CITY, ST, ZIP) is not present. Likewise, additional insurer information is only required when attorney information is not present.

SOURCE Code	Required Fields
PHON	DCN, SOURCE, BENE HICN, NAME, MSP TYPE, INFMT NAME, ADDR, CITY, ST, ZIP, INFMT REL <b>or</b> DCN, SOURCE, SSN, NAME, BENE STRT, CITY, ST, ZIP, MSP TYPE, INFMT NAME, ADDR, CITY, ST, ZIP, INFMT REL
SCLM	DCN, SOURCE, BENE HICN, NAME <b>or</b> DCN, SOURCE, SSN, NAME, BENE STRT, CITY, ST, ZIP

- After typing data in all of the required fields, press [PF8]. The system displays the ECRS MSP Inquiry Detail, Page 2 of 2 screen, as shown in the example below.

ECRS MSP INQUIRY DETAIL		PAGE 2 OF 2
CNTR NBR. 99999	BENE XXXXXXXXXXXXXXXX X XXXXXXXXXXXXXXXXXXXXXXXX	
HICN XXXXXXXXXXXXXXXX	DCN XXXXXXXXXXXXXXXX	
INSURER NAME: _____	INS TYPE: _ XXXXXXXXXXXXXXXX	
STREET: _____	PHONE: ____-____-____	
CITY: _____ ST: ____ ZIP: _____		
GROUP NO: _____	POLICY NO: _____	
POLICY HOLDER/SUBSCRIBER NAME: _____		
ILLNESS/INJURY DT: _____	DIAG: _____	
BENE REP NAME: _____	DESC: _____	
CITY: _____ ST: ____ ZIP: _____	REP TYPE: _ XXXXXXXXXXXXXXXX	
DIALYSIS TRAIN DT: _____	BLACK LUNG BENEFITS: _ EFF DT: _____	
F2=MENU F3=RETURN F5=UPDATE F7=BWD F9=CODES F12=EXIT		

- Type data in the appropriate fields.
- If you typed action code(s) in the ACTION(S) field on the ECRS MSP Inquiry Detail, Page 1 of 2 screen, you must type data in the fields required on this screen by those action code(s). See the table on page 2-28 for a list of applicable action codes, related special processing, and corresponding required fields on this screen and the previous screen.
- After typing data in all of the appropriate fields, press [PF5]. The system adds or updates the MSP inquiry transaction, then displays the message, "TRANSACTION COMPLETED SUCCESSFULLY."
- If you want to return to the ECRS MSP Inquiry Detail, Page 1 of 2 screen, press [PF7].  
If you want to exit the ECRS MSP Inquiry Detail screens, press [PF2] to return to the ECRS main menu or [PF12] to exit ECRS.



### ECRS MSP Inquiry Detail, Page 1 of 2 Screen Description

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ECRS MSP INQUIRY DETAIL                                     PAGE 1 OF 2
CNTR NBR. 99999  PHONE:  -  -  -  USER ID XXXXXXXX  ORIG DT: 99-99-9999
CNTR REP.:  STATUS XX  XXXXXXXXXXXXXXXX
ACTION(S):  DCN:  REASON XX  XXXXXXXXXXXXXXXX
ACTIVITY CODE:  SOURCE:  XXXXXXXXXXXXXXXX
BENE HICN:  SSN:  -  -  -  DOB:  SEX:
NAME:  PAT REL:  XXXXXXXXXXXXXXXX
MSP TYPE:  XXXXXXXXXXXXXXXX  EFF DT:  TERM DT:
SEND TO CWF? (Y/N)  CA

BENE STRT:
CITY:  ST:  ZIP:  -  PHONE:  -  -
SUBSCBR:
CHECK DATE:  CHECK AMOUNT: $ , , .  CHECK NO:
INFMT NAME:  PHONE:  -  -  -
ADDR:
CITY:  ST:  ZIP:  -  INFMT REL:  XXXXXXXXXXXX

EMPLR NAME:  EIN:
STREET:  PHONE:  -  -  -
CITY:  ST:  ZIP:  -  EMPLOYEE NO:

F2=MENU F3=RETURN F6=COB/HIMR F8=FWD F9=CODES F12=EXIT
    
```

ECRS MSP Inquiry Detail Screen, Page 1 of 2	
Field Name	Description
CNTR NBR.	<b>Medicare Contractors:</b> Contractor number entered on login screen ( <i>protected field</i> )  <b>CMS Users:</b> RO contractor number entered on main menu screen ( <i>protected field</i> )
PHONE	Phone number of contractor representative
USER ID	User ID of operator who entered MSP inquiry transaction ( <i>protected field</i> )
ORIG DT	Originating date in MM-DD-CCYY format ( <i>protected field</i> )
CNTR REP.	Name of contractor representative to contact for further information or clarification regarding MSP inquiry
STATUS	Two-character code explaining where MSP inquiry transaction is in the COB system process ( <i>protected field</i> ). Description of status code displays next to value. Valid values are:  CM    Completed DE    Delete (do not process) ECRS MSP inquiry transaction IP    In process, being edited by COB NW    New, not yet read by COB

<b>ECRS MSP Inquiry Detail Screen, Page 1 of 2</b>	
<b>Field Name</b>	<b>Description</b>
ACTION(S)	<p>Action code indicating type of special processing to perform on MSP Inquiry record. Valid values are:</p> <p>CA Class Action Suit            CL Closed or Settled Case            DE Develop to the Employer            DI Develop to the Insurer            SC Suppress Confirmation Letter            SL Suppress Lead Contractor Assignment            SR Suppress Right of Recovery Letters</p>
DCN	Document Control Number assigned by contractor to correspondence and/or paperwork associated with transaction ( <i>required field</i> )
REASON	<p>Two-character code explaining why the MSP inquiry is in a particular status (<i>protected field</i>). Description of reason code displays next to value. Valid values are:</p> <p>01 Not yet read by COB, used with NW status            02 Being processed by COB, used with IP status            03 Under development by COB, used with IP status            04 Update sent to CWF, used with IP status            05 Error received from CWF, being resolved by COB contractor, used with IP status            07 Auditor follow-up development in progress, used with IP status            10 Not processing            11 Not yet eligible for Medicare, used with HD status            14 Duplicate request, development already in process, used with HD status            50 Posted to CWF, response received with no errors, used with CM status            51 No changes (additions, modifications, or deletions) made to CWF, used with CM status            52 Returned—rejected by CWF, used with CM status            53 Returned—duplicate ECRS request, used with CM status            54 100 or more threshold met            55 20 or more threshold met            56 OBRA does not apply, no update            57 Record already updated            58 Non-compliant GHP            59 Employer verified existing record, no update            60 Invalid HICN            61 No Part A entitlement            62 Closed, no response to development            63 Development complete, no MSP            64 Letter sent            65 Deceased, used with CM status            66 ESRD/DIB conflict            67 No response from CWF            68 Closed for Self-Report (More current information was received by the COB contractor in the form of a self-report. You will be notified of any changes in record status on the ECRS Changed Record Notification screen.)            69 Developed to GHP, no response</p>

<b>ECRS MSP Inquiry Detail Screen, Page 1 of 2</b>	
<b>Field Name</b>	<b>Description</b>
REASON (continued)	<p>Two-character code explaining why the MSP inquiry is in a particular status (<i>protected field</i>). Description of reason code displays next to value. Valid values (continued from page 2-32) are:</p> <ul style="list-style-type: none"> <li>70 Developed to non-EGHP, no response</li> <li>71 Developed to beneficiary, no response</li> <li>72 Developed to informant, no response</li> <li>73 Medicare beneficiary retired</li> <li>74 Spouse retired</li> <li>75 GHP lifetime of yearly benefits past maximum amount</li> <li>76 No coverage with insurance company</li> <li>77 Medicare Supplemental Plan</li> <li>78 Employer has less than 20 employees</li> <li>79 Per employer, Medicare beneficiary is not covered under spouse's GHP</li> <li>80 Employer has less than 100 employees</li> <li>81 Medicare is primary due to ESRD coordination period</li> <li>82 Per insurance, seasonal employee and not eligible for the month</li> <li>83 Incoming request conflicts with information on file</li> <li>84 Insufficient information to update CWF</li> <li>85 Venue changed</li> <li>87 MSP record exists, used with CM status (check HIMR or resubmit as assistance request)</li> <li>88 No update, not lead contractor</li> </ul>
ACTIVITY CODE	<p>Activity of contractor (<i>required field</i>). Valid values are:</p> <ul style="list-style-type: none"> <li>C Claims (Pre-Payment) (22001)</li> <li>D Debt Collection/Referral (42021)</li> <li>G Group Health Plan (42003)</li> <li>I General Inquires (42004)</li> <li>N Liability, No Fault, Workers' Compensation, and Federal Tort Claim Act (42002)</li> </ul>
SOURCE	<p>Four-character code identifying source of MSP inquiry information (<i>required field</i>). Description of source code displays next to value. Valid values are:</p> <ul style="list-style-type: none"> <li>CHEK Unsolicited check</li> <li>LTTR Letter</li> <li>PHON Phone call</li> <li>SCLM Claim submitted to Medicare contractor for secondary payment</li> </ul>
BENE HICN	Health Insurance Claim Number of beneficiary. Type HICN without dashes, spaces, or other special characters.
SSN	Social Security Number of beneficiary
DOB	Beneficiary's date of birth
SEX	<p>Sex of beneficiary. Valid values are:</p> <ul style="list-style-type: none"> <li>M Male</li> <li>F Female</li> <li>U Unknown</li> </ul>
NAME	Name of beneficiary in first name/middle initial/last name format. First and last names are <i>required fields</i> .

<b>ECRS MSP Inquiry Detail Screen, Page 1 of 2</b>	
<b>Field Name</b>	<b>Description</b>
PAT REL	<p>Patient relationship between policy holder and beneficiary. Description of code displays next to value. Valid values are:</p> <ul style="list-style-type: none"> <li>01 Patient is policy holder</li> <li>02 Spouse</li> <li>03 Natural child, insured has financial responsibility</li> <li>04 Natural child, insured does not have financial responsibility</li> <li>05 Stepchild</li> <li>06 Foster child</li> <li>07 Ward of the Court</li> <li>08 Employee</li> <li>09 Unknown</li> <li>10 Handicapped dependent</li> <li>11 Organ donor</li> <li>12 Cadaver donor</li> <li>13 Grandchild</li> <li>14 Niece/nephew</li> <li>15 Injured plaintiff</li> <li>16 Sponsored dependent</li> <li>17 Minor dependent of a minor dependent</li> <li>18 Parent</li> <li>19 Grandparent dependent</li> <li>20 Not available</li> </ul>
MSP TYPE	<p>One-character code identifying type of MSP coverage. Description of code displays next to value. Valid values are:</p> <ul style="list-style-type: none"> <li>A Working Aged</li> <li>B ESRD</li> <li>C Conditional Payment</li> <li>D Automobile Insurance, No Fault</li> <li>E Workers' Compensation</li> <li>F Federal (Public Health)</li> <li>G Disabled</li> <li>H Black Lung</li> <li>I Veterans</li> <li>L Liability</li> </ul>
EFF DT	Effective date of MSP coverage in MMDDCCYY format, cannot equal termination date
TERM DT	Termination date of MSP coverage in MMDDCCYY format, cannot equal effective date

ECRS MSP Inquiry Detail Screen, Page 1 of 2	
Field Name	Description
SEND TO CWF? (Y/N)	<p>Indicates whether to send MSP inquiry to CWF. Valid values are:</p> <p>Y    Send to CWF (default unless ACTION(S) field = DE or DI or INFMT REL field = D, in which case default is N and this is a <i>protected field</i>)</p> <p>N    Do not send to CWF</p> <p><i>For EGHP MSP Types:</i> In addition to the minimum HUSP fields, the EMPLR NAME, STREET, CITY, ST, and ZIP fields are required or the system will set this switch to N and develop the record.</p> <p><i>For Non-EGHP MSP Types:</i> In addition to the minimum HUSP fields, the BENE REP or INSURER NAME, STREET, CITY, ST, ZIP, DIAG, and ILLNESS/INJURY DT fields are required or the system will set this switch to N and develop the record.</p>
CA	<p>Indicates type of Class Action suit. Code entered determines lead contractor assignment. Valid values are:</p> <p>01      Gel Implants (TrailBlazers, 00400)</p> <p>02      Gel Implants (Alabama, 00010)</p> <p>03      Bone Screw Recoveries (United Government Services, 00454)</p> <p>04      Diet Drug Recoveries (Cahaba BCBS Alabama, 00010)</p> <p>05      Sulzer Inter-Op Acetabular Shells for Hip Implant Recoveries (Chisholm Administrative Services, 00340)</p> <p>06      Sulzer Orthopedic and Defective Knee Replacement Recoveries (Chisholm Administrative Services, 00340)</p>
BENE STRT	First and second lines of beneficiary's street address
CITY	Beneficiary's city
ST	Beneficiary's state
ZIP	Beneficiary's ZIP code
PHONE	Beneficiary's telephone number
CHECK DATE	Date of check received (for development letter to provider). <i>Required field</i> if value in SOURCE field = CHEK. You cannot future-date this field.
CHECK AMOUNT	Amount of check received (for development letter to provider). <i>Required field</i> if value in SOURCE field = CHEK.
CHECK NO	Number of check received (for development letter to provider). <i>Required field</i> if value in SOURCE field = CHEK.
INFMT NAME*	Name of person (in first name/middle initial/last name format) informing contractor of change in MSP coverage. <i>Required field</i> if value in SOURCE field = CHEK, LTTR, or PHON.
PHONE	Informant's telephone number

\* The following entries are *not* permitted in this field: ATTORNEY, BC, BCBX, BLUE CROSS, BLUE SHIELD, BS, BX, CMS, HCFA, INSURER, MEDICARE, MISC, MISCELLANEOUS, N/A, NA, NO, NONE, SUPPLEMENT, SUPPLEMENTAL, UNK, and UNKNOWN.

<b>ECRS MSP Inquiry Detail Screen, Page 1 of 2</b>	
<b>Field Name</b>	<b>Description</b>
ADDR*	First and second lines of informant's street address. <i>Required field</i> if value in SOURCE field = CHEK, LTTR, or PHON.
CITY*	Informant's city. <i>Required field</i> if value in SOURCE field = CHEK, LTTR, or PHON.
ST	Informant's state. <i>Required field</i> if value in SOURCE field = CHEK, LTTR, or PHON.
ZIP	Informant's ZIP code. <i>Required field</i> if value in SOURCE field = CHEK, LTTR, or PHON.
INFMT REL	One-character code indicating relationship of informant to beneficiary. Description of code displays next to value. <i>Required field</i> if value in SOURCE field = CHEK, LTTR, or PHON. Valid values are:  A Attorney representing beneficiary B Beneficiary C Child D Defendant's attorney E Employer F Father I Insurer M Mother N Non-relative O Other relative P Provider R Beneficiary representative (other than attorney) S Spouse U Unknown
EMPLR NAME*	Name of employer providing group health insurance under which beneficiary is covered
EIN	Employer Identification Number
STREET*	Employer's street address
PHONE	Employer's phone number
CITY*	Employer's city
ST	Employer's state
ZIP	Employer's ZIP code
EMPLOYEE NO	Employee number of policy holder

\* The following entries are *not* permitted in this field: ATTORNEY, BC, BCBX, BLUE CROSS, BLUE SHIELD, BS, BX, CMS, HCFA, INSURER, MEDICARE, MISC, MISCELLANEOUS, N/A, NA, NO, NONE, SUPPLEMENT, SUPPLEMENTAL, UNK, and UNKNOWN.

**Transportation**

<b>ECRS MSP Inquiry Detail Screen, Page 1 of 2</b>	
<b>PF Key</b>	<b>Function</b>
02	Return to ECRS main menu
03	Return to previous level
06	Request MSP and beneficiary data from CWF and COB database
08	Page forward to second page of screen
09	Transport to ECRS Code Selection screen
12	Exit ECRS

**ECRS MSP Inquiry Detail, Page 2 of 2 Screen Description**

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ECRS MSP INQUIRY DETAIL                                PAGE 2 OF 2
CNTR NBR. 99999          BENE XXXXXXXXXXXXXXXXXXXX X XXXXXXXXXXXXXXXXXXXXXXXXXXXX
HICN XXXXXXXXXXXXXXXX   DCN XXXXXXXXXXXXXXXXXXXX
INSURER NAME: _____ INS TYPE: _ XXXXXXXXXXXXXXXXXXXX
STREET: _____ PHONE: ___-___-____
CITY: _____ ST: ___ ZIP: _____
GROUP NO: _____ POLICY NO: _____
POLICY HOLDER/SUBSCRIBER NAME: _____

DIAG: _____
ILLNESS/INJURY DT: _____ DESC: _____
BENE REP NAME: _____ STRT: _____
CITY: _____ ST: ___ ZIP: _____ - _____ REP TYPE: _ XXXXXXXXXXXXXXXXXXXX

DIALYSIS TRAIN DT: _____ BLACK LUNG BENEFITS: _ EFF DT: _____

F2=MENU F3=RETURN F5=UPDATE F7=BWD F9=CODES F12=EXIT
    
```

<b>ECRS MSP Inquiry Detail Screen, Page 2 of 2</b>	
<b>Field Name</b>	<b>Description</b>
CNTR NBR.	<b>Medicare Contractors:</b> Contractor number entered on login screen ( <i>protected field</i> )  <b>CMS Users:</b> RO contractor number entered on main menu screen ( <i>protected field</i> )
BENE	Name of beneficiary in first name/middle initial/last name format ( <i>protected field</i> )
HICN	Health Insurance Claim Number for beneficiary ( <i>protected field</i> )

<b>ECRS MSP Inquiry Detail Screen, Page 2 of 2</b>	
<b>Field Name</b>	<b>Description</b>
DCN	Document Control Number assigned by contractor to correspondence and/or paperwork associated with this transaction ( <i>protected field</i> )
INSURER NAME*	Name of insurance carrier for MSP coverage
INS TYPE	One-character code for type of insurance. Valid values are: A Insurance or Indemnity (OTHER TYPES) B Group Health Organization (GHO) C Preferred Provider Organization (PPO) D Third Party Administrator arrangement under an Administrative Service Only (ASO) contract without stop loss from any entity (TPA/ASO) E Third Party Administrator arrangement with stop loss insurance issued from any entity (STOP LOSS TPA) F Self-Insured/Self-Administered (SELF-INSURED) G Collectively-Bargained Health and Welfare Fund (HEALTH/WELFAR) H Multiple Employer Health Plan with at least one employer who has more than 100 full- and/or part-time employees (EMPLOYER+100) I Multiple Employer Health Plan with at least one employer who has more than 20 full- and/or part-time employees (EMPLOYER+20) J Hospitalization Only Plan covering inpatient hospital services (HOSPITAL ONLY) K Medical Services Only Plan covering only non-inpatient medical services (MEDICAL ONLY) M Medicare Supplemental Plan, Medigap, Medicare Wraparound Plan or Medicare Carve Out Plan (SUPPLEMENTAL) Blank Unknown (UNKNOWN)
STREET*	First and second lines of insurer's street address
PHONE	Insurer's phone number
CITY*	Insurer's city
ST	Insurer's state
ZIP	Insurer's ZIP code
GROUP NO	Group number of insurance coverage
POLICY NO	Policy number of insurance coverage
POLICY HOLDER/SUBSCRIBER NAME	Name of individual covered by this insurance in first name/middle initial/last name format

\* The following entries are *not* permitted in this field: ATTORNEY, BC, BCBX, BLUE CROSS, BLUE SHIELD, BS, BX, CMS, HCFA, INSURER, MEDICARE, MISC, MISCELLANEOUS, N/A, NA, NO, NONE, SUPPLEMENT, SUPPLEMENTAL, UNK, and UNKNOWN.



<b>ECRS MSP Inquiry Detail Screen, Page 2 of 2</b>	
<b>Field Name</b>	<b>Description</b>
REP TYPE	One-character code indicating type of relationship between beneficiary and his/her representative. Description of code displays next to value. Valid values are: A Attorney R Representative (individual not acting as attorney)
DIAG	Five-digit diagnosis code that applies to this MSP occurrence. Enter up to five diagnosis codes.
ILLNESS/INJURY DT	Date illness or injury occurred for workers' compensation, automobile, or liability coverage (in MMDDCCYY format)
DESC	Brief description of accident or illness for workers' compensation, automobile, or liability coverage
BENE REP NAME*	Name of individual representing a beneficiary's medical affairs or estate. Representation may be applicable in a workers' compensation, automobile, or liability insurance case. Type name in first name/middle initial/last name format.
STRT*	Beneficiary representative's street
CITY*	Beneficiary representative's city
ST	Beneficiary representative's state
ZIP	Beneficiary representative's ZIP code
DIALYSIS TRAIN DT	Date beneficiary received self-dialysis training (in MMDDCCYY format)
BLACK LUNG BENEFITS	One-character code indicating whether beneficiary receives benefits under the Black Lung Program. Valid values are: N No Y Yes
EFF DT	Date beneficiary began receiving benefits under the Black Lung Program in MMDDCCYY format. This field is only valid when BLACK LUNG BENEFITS field value is <b>Y</b> .

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\* The following entries are *not* permitted in this field: ATTORNEY, BC, BCBX, BLUE CROSS, BLUE SHIELD, BS, BX, CMS, HCFA, INSURER, MEDICARE, MISC, MISCELLANEOUS, N/A, NA, NO, NONE, SUPPLEMENT, SUPPLEMENTAL, UNK, and UNKNOWN.

**Transportation**

<b>ECRS MSP Inquiry Detail Screen, Page 2 of 2</b>	
<b>PF Key</b>	<b>Function</b>
02	Return to ECRS main menu
03	Return to previous level
05	Add/update MSP inquiry transaction
07	Page backward to first page of screen
09	Transport to ECRS Code Selection screen
12	Exit ECRS

## Screen Scraping Beneficiary Information for MSP Inquiries

Screen scraping allows you to retrieve beneficiary information from the COB database or the HIMR BENA screens at each host site. The system then carries that information forward to the first page of the ECRS MSP Inquiry Detail screens and fills in the associated fields with the appropriate information.

Follow the steps below to screen scrape beneficiary information for an MSP inquiry.

1. From the first page of the ECRS MSP Inquiry Detail screen, type a HICN in the BENE HICN field and press [PF6].

The system first searches the COB database. If the system finds beneficiary information related to that HICN there, it automatically fills the appropriate fields on the first page of the ECRS MSP Inquiry screen with the applicable information.

If the system does not find the HICN on the COB database, it then searches the HIMR BENA screens at each host site. When the system retrieves MSP data from HIMR, automatically fills the appropriate fields on the first page of the ECRS MSP Inquiry screen with the applicable information.

The system highlights the fields where information was imported from the COB database or CWF, as shown in the example below.

```

ECRS MSP INQUIRY DETAIL                                PAGE 1 OF 2
CNTR NBR. 99999  PHONE:  ___ - ___ - ___  USER ID XXXXXXXX  ORIG DT: 99-99-9999
CNTR REP.:  _____  STATUS XX  XXXXXXXXXXXXXXXX
ACTION(S):  _____  DCN:  _____  REASON XX  XXXXXXXXXXXXXXXX
ACTIVITY CODE:  _____  SOURCE:  _____  XXXXXXXXXXXXXXXX
BENE HICN: XXXXXXXXXXXXX  SSN: XXX - XX - XXXX  DOB: MMDDCCYY  SEX: X
NAME: XXXXXXXXXXXXXXXX X XXXXXXXXXXXXXXXX  PAT REL:  _____  XXXXXXXXXXXXXXXX
MSP TYPE:  _____  XXXXXXXXXXXXXXXX  EFF DT:  _____  TERM DT:  _____
SEND TO CWF? (Y/N)  ___ CA  ___

BENE STRT: XXXXXXXXXXXXXXXX XXXXXXXXXXXXXXXX
CITY: XXXXXXXXXXXXXXXX  ST: XX  ZIP: XXXXX - XXXX  PHONE: XXX - XXX - XXXX

CHECK DATE:  _____  CHECK AMOUNT: $ ___, ___, __.  CHECK NO:  _____
INFMT NAME:  _____  PHONE:  ___ - ___ - ___
ADDR:  _____
CITY:  _____  ST:  ___  ZIP:  _____ - _____  INFMT REL:  _____ XXXXXXXXXXXXXXXX

EMPLR NAME:  _____  EIN:  _____
STREET:  _____  PHONE:  ___ - ___ - ___
CITY:  _____  ST:  ___  ZIP:  _____ - _____  EMPLOYEE NO:  _____

F2=MENU F3=RETURN F6=COB/HIMR F8=FWD F9=CODES F12=EXIT
    
```

**Note:** The second page of the ECRS MSP Inquiry Detail screen contains no imported information from the COB database or CWF.

2.

If you...	Follow these steps:
Want to use this imported information	<ol style="list-style-type: none"><li>1. Change information in any of the highlighted fields by typing the correct information over the imported information.</li><li>2. Press [PF8] to display the second page of the screen. Press [PF7] if you need to display the first page of the screen again.</li><li>3. After you complete both pages of the screen, press [PF5] on the second page to update the database.</li></ol>
Do not want to use this imported information, but want to look up a new beneficiary	<ol style="list-style-type: none"><li>1. Type the new beneficiary's HICN in the BENE HICN field on the first page.</li><li>2. Press [PF6] on the first page to overlay applicable fields with information from the new beneficiary's record.</li></ol>

## Deleting an MSP Inquiry Transaction

Follow the steps below to delete a new (status NW) MSP inquiry transaction before it is processed by COB. If the COB system has started processing your transaction, you cannot delete it.

- From the COB ECRS main menu screen, type **05** in the SELECTION field, and type the search criteria in the appropriate fields. Press [Enter]. The system displays the ECRS MSP Inquiry List screen, as shown in the example below.

ECRS MSP INQUIRY LIST								
USER ID:	_____	STATUS:	__	REASON:	__			
ORIGIN DATE FROM:	_____	THROUGH:	_____	CNTR NBR:	_____	HICN:	_____	
DCN:	_____							
SEL	HICN	CNTR	DCN	ST	RS	ORGIN DT	LST UPDATE	USER ID
—	XXXXXXXXXXXXXX	XXXXX	XXXXXXXXXXXXXXXXXX	XX	XX	99-99-9999	99-99-9999	XXXXXXXXXX
—	XXXXXXXXXXXXXX	XXXXX	XXXXXXXXXXXXXXXXXX	XX	XX	99-99-9999	99-99-9999	XXXXXXXXXX
—	XXXXXXXXXXXXXX	XXXXX	XXXXXXXXXXXXXXXXXX	XX	XX	99-99-9999	99-99-9999	XXXXXXXXXX
—	XXXXXXXXXXXXXX	XXXXX	XXXXXXXXXXXXXXXXXX	XX	XX	99-99-9999	99-99-9999	XXXXXXXXXX
—	XXXXXXXXXXXXXX	XXXXX	XXXXXXXXXXXXXXXXXX	XX	XX	99-99-9999	99-99-9999	XXXXXXXXXX
—	XXXXXXXXXXXXXX	XXXXX	XXXXXXXXXXXXXXXXXX	XX	XX	99-99-9999	99-99-9999	XXXXXXXXXX
—	XXXXXXXXXXXXXX	XXXXX	XXXXXXXXXXXXXXXXXX	XX	XX	99-99-9999	99-99-9999	XXXXXXXXXX
—	XXXXXXXXXXXXXX	XXXXX	XXXXXXXXXXXXXXXXXX	XX	XX	99-99-9999	99-99-9999	XXXXXXXXXX
—	XXXXXXXXXXXXXX	XXXXX	XXXXXXXXXXXXXXXXXX	XX	XX	99-99-9999	99-99-9999	XXXXXXXXXX
—	XXXXXXXXXXXXXX	XXXXX	XXXXXXXXXXXXXXXXXX	XX	XX	99-99-9999	99-99-9999	XXXXXXXXXX
—	XXXXXXXXXXXXXX	XXXXX	XXXXXXXXXXXXXXXXXX	XX	XX	99-99-9999	99-99-9999	XXXXXXXXXX
—	XXXXXXXXXXXXXX	XXXXX	XXXXXXXXXXXXXXXXXX	XX	XX	99-99-9999	99-99-9999	XXXXXXXXXX
—	XXXXXXXXXXXXXX	XXXXX	XXXXXXXXXXXXXXXXXX	XX	XX	99-99-9999	99-99-9999	XXXXXXXXXX
—	XXXXXXXXXXXXXX	XXXXX	XXXXXXXXXXXXXXXXXX	XX	XX	99-99-9999	99-99-9999	XXXXXXXXXX
—	XXXXXXXXXXXXXX	XXXXX	XXXXXXXXXXXXXXXXXX	XX	XX	99-99-9999	99-99-9999	XXXXXXXXXX
—	XXXXXXXXXXXXXX	XXXXX	XXXXXXXXXXXXXXXXXX	XX	XX	99-99-9999	99-99-9999	XXXXXXXXXX
—	XXXXXXXXXXXXXX	XXXXX	XXXXXXXXXXXXXXXXXX	XX	XX	99-99-9999	99-99-9999	XXXXXXXXXX
—	XXXXXXXXXXXXXX	XXXXX	XXXXXXXXXXXXXXXXXX	XX	XX	99-99-9999	99-99-9999	XXXXXXXXXX

ENTER S TO VIEW DETAILED INFO, D TO DELETE, OR R TO CHANGE AN INQUIRY TO A REQUEST  
 F2=MENU F3=RETURN F5=UPDATE F7=BWD F8=FWD F12=EXIT

- From this screen, you can change or delete the search criteria to initiate a new search. You can perform searches using the following criteria:

Contractor Number, HICN, User ID, Status, Reason, DCN, Origin Date From, and Through in any combination except you cannot combine DCN and HICN searches. In addition, you must combine searches on Origin Date From and/or Through, User ID, Status, and Reason with a DCN, HICN or Contractor Number search.

The dates in the ORIGIN DATE FROM and THROUGH fields default to the dates entered in the SEARCH ORIGIN DATE fields on the COB ECRS main menu screen. If you did not enter dates in those fields on the COB ECRS main menu screen, the fields on this screen default to the date 30 days prior to the current date and the current date.

Typing information in the appropriate fields and pressing [Enter] narrows or widens your search.

- Press [PF7] to scroll backward or [PF8] to scroll forward through the list of MSP inquiry transactions.
- Type **D** in the SEL field next to new (status NW) MSP inquiry transaction you want to delete. Press [Enter]. The system marks the MSP inquiry transaction for deletion.
- If you want to exit the ECRS MSP Inquiry List screen, press [PF2] to return to the ECRS main menu without retaining current search criteria, [PF3] to return to the ECRS main menu while retaining current search criteria, or [PF12] to exit ECRS.

**Note:** For the ECRS MSP Inquiry List Screen Description, see page 2-25.



### ECRS Code Selection Screen Description

<b>ECRS Code Selection Screen</b>	
<b>Field Name</b>	<b>Description</b>
SEL	Selection field. Type <b>S</b> in this field to transport a code back to the ECRS CWF Assistance Request screen or the ECRS MSP Inquiry Detail screen.
CODE	ECRS codes that apply to field selected. Refer to the ECRS Quick Reference Card for charts of Action Codes, Activity Codes, Informant Relationship Codes, Insurance Type Codes, and Source Codes.
DESCRIPTION	Explanations of ECRS codes. Refer to the ECRS Quick Reference Card for charts of Action Codes, Activity Codes, Informant Relationship Codes, Insurance Type Codes, and Source Codes.

### Transportation

<b>ECRS Code Selection Screen</b>	
<b>PF Key</b>	<b>Function</b>
02	Return to ECRS main menu
07	Scroll backward
08	Scroll forward

## Reviewing Your Contractor Site Workload (for Medicare Contractors)

The ECRS Workload Tracking screen provides you with statistics on the number of CWF assistance requests and MSP inquiries (sorted by activity code) that your contractor site submitted during a user-specified time period. The statistics also include information about the number of CWF assistance requests and MSP inquiries that were rejected, as well as gross, net, and grand totals.

Follow the steps below to review the workload for your contractor site.

1. From the COB ECRS main menu screen, type **11** in the SELECTION field and press [Enter]. The system displays the ECRS Workload Tracking screen, as shown in the example below.

ECRS WORKLOAD TRACKING SCREEN							
FROM: MMDDCCYY THROUGH: MMDDCCYY							
CONTRACTOR NUMBER: XXXXX							
ACT CODE	ACT NUM	CWF ASST REQ	REJECTS	MSP INQUIRY	REJECTS	GROSS TOTAL	NET TOTAL
-	_____	000,000	0,000	000,000	0,000	0,000,000	0,000,000
-	_____	000,000	0,000	000,000	0,000	0,000,000	0,000,000
-	_____	000,000	0,000	000,000	0,000	0,000,000	0,000,000
-	_____	000,000	0,000	000,000	0,000	0,000,000	0,000,000
-	_____	000,000	0,000	000,000	0,000	0,000,000	0,000,000
GRAND TOTAL		0,000,000	00,000	0,000,000	00,000	0,000,000	0,000,000
F2=MENU F3=RETURN 12=EXIT							

2. If you want to exit the ECRS Workload Tracking screen, press [PF2] to return to the ECRS main menu, [PF3] to return to the previous level, or [PF12] to exit ECRS.

### ECRS Workload Tracking Screen Description (for Medicare Contractors)

<i>ECRS Workload Tracking Screen (for Medicare Contractors)</i>	
Field Name	Description
FROM	Start date of reporting period. Defaults to first day of previous month. Type another date in this field to change the start of the reporting period.
THROUGH	End date of reporting period. Defaults to last day of previous month. Type another date in this field to change the end of the reporting period.
CONTRACTOR NUMBER	Contractor number of contractor currently logged onto ECRS ( <i>protected field</i> )



<b>ECRS Workload Tracking Screen (for Medicare Contractors)</b>	
<b>Field Name</b>	<b>Description</b>
ACT CODE	Activity code ( <i>protected field</i> ). Valid values are: C Claims (Pre-Payment) (22001) D Debt Collection/Referral (42021) G Group Health Plan (42003) I General Inquires (42004) N Liability, No Fault, Workers' Compensation, and Federal Tort Claim Act (42002)
ACT NUM	Corresponding account number for each activity code. Valid values are: 22001 Claims (Pre-Payment) 42002 Liability, No Fault, Workers' Compensation, and Federal Tort Claim Act 42003 Group Health Plan 42004 General Inquires 42021 Debt Collection/Referral
CWF ASST REQ	Number of CWF assistance requests submitted by contractor for each activity code ( <i>protected field</i> )
REJECTS	Number of duplicate CWF assistance requests submitted by contractor for each activity code (CM53) ( <i>protected field</i> )
MSP INQUIRY	Number of MSP inquires submitted by contractor for each activity code ( <i>protected field</i> )
REJECTS	Number of duplicate MSP inquires submitted by contractor for each activity code (CM53), combined with number of MSP inquires submitted by contractor that should have been a CWF assistance request (CM87) ( <i>protected field</i> )
GROSS TOTAL	Total number of CWF assistance requests and MSP inquires submitted by contractor for each activity code, including duplicates ( <i>protected field</i> )
NET TOTAL	Total number of CWF assistance requests and MSP inquires submitted by contractor for each activity code, excluding duplicates ( <i>protected field</i> )
GRAND TOTAL	Six grand totals consist of the following: <ul style="list-style-type: none"> <li>• Grand total of CWF assistance requests submitted by contractor for all activity codes</li> <li>• Grand total of all duplicate/rejected CWF assistance requests submitted by contractor for all activity codes</li> <li>• Grand total of all MSP inquiries submitted by contractor for all activity codes</li> <li>• Grand total of all duplicate/rejected MSP inquiries submitted by contractor for all activity codes</li> <li>• Grand total of Net Totals for CWF assistance requests and MSP inquiries submitted by the contractor for all activity codes, including duplicates</li> <li>• Grand total of Gross Totals for CWF assistance requests and MSP inquiries submitted by contractor for all activity codes, excluding duplicates</li> </ul>

**Transportation**

<b><i>ECRS Workload Tracking Screen (for Medicare Contractors)</i></b>	
<b>PF Key</b>	<b>Function</b>
02	Return to ECRS main menu
03	Return to previous level
12	Exit ECRS

## Reviewing Contractor Workloads (for CMS Users)

The ECRS Workload Tracking screen provides you with statistics on the number of CWF assistance requests and MSP inquiries (sorted by activity code) that contractor sites submitted during a user-specified time period. The statistics also include information about the number of CWF assistance requests and MSP inquiries that were rejected, as well as net, gross, and national totals.

Follow the steps below to review the workload for contractor sites.

1. From the COB ECRS main menu screen, type **11** in the SELECTION field and press [Enter]. The system displays the ECRS Workload Tracking screen, as shown in the example below.

ECRS WORKLOAD TRACKING SCREEN							
CONTR:		FROM: MMDDCCYY		THROUGH: MMDDCCYY			
		SEL: X C X N		_G _I _D		_ ALL	
CONTR	ACT	CWF	REJECTS	MSP	REJECTS	GROSS	NET
	CODE	ASST REQ		INQUIRY		TOTAL	TOTAL
<b>NAT</b>	<b>TTL:</b>	<b>999,999</b>	<b>99,999</b>	<b>999,999</b>	<b>99,999</b>	<b>999,999</b>	<b>999,999</b>
00010	C	4,000	30	2,000	10	5,960	6,000
00010	N	1,000	10	6,000	20	6,970	7,000
00020	C	1,200	0	12,000	0	13,500	13,500
00020	N	1,500	10	2,000	15	3,475	3,500
00030	C	900	3	400	1	1,296	1,300
00030	N	1,100	0	300	0	1,400	1,400
00040	C	900	0	800	0	1,500	1,500

F2=MENU F3=RETURN F8=FWD F12=EXIT

2. If you want a report on specific activity codes, type **X** in the appropriate field or fields. If you want a report on all of the activity codes, leave the selection fields blank or type **X** in all of the fields.
3. If you want a report on specific contractors, type up to 20 five-digit contractor numbers the fields provided. If you want a report on all of the contractors, leave the fields blank.

If you enter three-digit contractor numbers in these fields, the system automatically fills in the two leading zeroes after you press [Enter].

Press [Enter]. The system displays a list of workload statistics for the activity codes and contractors that you selected.

4. Press [PF7] to scroll backward or [PF8] to scroll forward through the list of contractors.
5. If you want to exit the ECRS Workload Tracking screen, press [PF2] to return to the ECRS main menu, [PF3] to return to the previous level, or [PF12] to exit ECRS.

## ECRS Workload Tracking Screen Description (for CMS Users)

<b>ECRS Workload Tracking Screen (for CMS Users)</b>	
<b>Field Name</b>	<b>Description</b>
FROM	Start date of reporting period. Defaults to first day of previous month. Type another date in this field to change the start of the reporting period.
THROUGH	End date of reporting period. Defaults to last day of previous month. Type another date in this field to change the end of the reporting period.
SEL	Selection fields. Type <b>X</b> in the appropriate field or fields to report on specific activity codes. If you leave these selection fields blank, the report defaults to all activity codes. Activity codes are:  C Claims (Pre-Payment) (22001) D Debt Collection/Referral (42021) G Group Health Plan (42003) I General Inquires (42004) N Liability, No Fault, Workers' Compensation, and Federal Tort Claim Act (42002)
CONTR	Contractor number. Type up to 20 five-digit contractor numbers the fields provided and press [Enter] to display workload statistics for those contractors. Leave all fields blank and press [Enter] to display workload statistics for all contractors.  If you enter three-digit contractor numbers in these fields, the system automatically fills in the two leading zeroes.
CONTR	Contractor number ( <i>protected field</i> )
ACT CODE	Activity code ( <i>protected field</i> ). Valid values are:  C Claims (Pre-Payment) (22001) D Debt Collection/Referral (42021) G Group Health Plans (42003) I General Inquires (42004) N Liability, No Fault, Workers' Compensation, and Federal Tort Claim Act (42002)
CWF ASST REQ	Number of CWF assistance requests submitted by contractor for each activity code ( <i>protected field</i> )
REJECTS	Number of duplicate CWF assistance requests submitted by contractor for each activity code (CM53) ( <i>protected field</i> )
MSP INQUIRY	Number of MSP inquires submitted by contractor for each activity code ( <i>protected field</i> )
REJECTS	Number of duplicate MSP inquires submitted by contractor for each activity code (CM53), combined with number of MSP inquires submitted by contractor that should have been a CWF assistance request (CM87) ( <i>protected field</i> )
NET TOTAL	Total number of CWF assistance requests and MSP inquires submitted by contractor for each activity code, excluding duplicates ( <i>protected field</i> )
GROSS TOTAL	Total number of CWF assistance requests and MSP inquires submitted by contractor for each activity code, including duplicates ( <i>protected field</i> )

<b>ECRS Workload Tracking Screen (for CMS Users)</b>	
<b>Field Name</b>	<b>Description</b>
NAT TTL	<p>Six national totals consist of the following:</p> <ul style="list-style-type: none"> <li>• National total of CWF assistance requests submitted by all contractors for all activity codes selected</li> <li>• National total of all duplicate/rejected CWF assistance requests submitted by all contractors for all activity codes selected</li> <li>• National total of all MSP inquiries submitted by all contractors for all activity codes selected</li> <li>• National total of all duplicate/rejected MSP inquiries submitted by all contractors for all activity codes selected</li> <li>• National total of Net Totals for CWF assistance requests and MSP inquiries submitted by all contractors for all activity codes, including duplicates</li> <li>• National total of Gross Totals for CWF assistance requests and MSP inquiries submitted by all contractors for all activity codes, excluding duplicates</li> </ul>

**Transportation**

<b>ECRS Contractor Tracking Screen (for CMS Users)</b>	
<b>PF Key</b>	<b>Function</b>
02	Return to ECRS main menu
03	Return to previous level
07	Scroll backward
08	Scroll forward
12	Exit ECRS

## Viewing the List of Workers' Compensation Set-Aside Trust Cases

**Note:** The ECRS Workers' Compensation Set-Aside List screen is for authorized CMS Regional Office users only. Medicare contractor users do not have access to this screen.

Follow the steps below to view the list of workers' compensation set-aside trust cases. You only have the ability to view cases that were added by your Regional Office.

- From the COB ECRS main menu screen, type **10** in the SELECTION field, and type the search criteria in the appropriate fields. Press [Enter]. The system displays the ECRS Workers' Comp Set-Aside List screen, as shown in the example below.

ECRS WORKERS COMP SET-ASIDE LIST SCREEN

STATUS: \_\_\_\_\_ REASON: \_\_\_\_\_ HICN: \_\_\_\_\_ SSN: \_\_\_\_\_ DCN: \_\_\_\_\_  
ORIGIN DATE FROM: \_\_\_\_\_ THROUGH: \_\_\_\_\_

SEL	HICN	SSN	ST	RS	DCN	ORIGIN DATE	LST UPDATE	USER ID
-	XXXXXXXXXXXX	XXXXXXXXXX	XX	XX	XXXXXXXXXXXXXXX	99-99-9999	99-99-9999	XXXXXXXXXX
-	XXXXXXXXXXXX	XXXXXXXXXX	XX	XX	XXXXXXXXXXXXXXX	99-99-9999	99-99-9999	XXXXXXXXXX
-	XXXXXXXXXXXX	XXXXXXXXXX	XX	XX	XXXXXXXXXXXXXXX	99-99-9999	99-99-9999	XXXXXXXXXX
-	XXXXXXXXXXXX	XXXXXXXXXX	XX	XX	XXXXXXXXXXXXXXX	99-99-9999	99-99-9999	XXXXXXXXXX
-	XXXXXXXXXXXX	XXXXXXXXXX	XX	XX	XXXXXXXXXXXXXXX	99-99-9999	99-99-9999	XXXXXXXXXX
-	XXXXXXXXXXXX	XXXXXXXXXX	XX	XX	XXXXXXXXXXXXXXX	99-99-9999	99-99-9999	XXXXXXXXXX
-	XXXXXXXXXXXX	XXXXXXXXXX	XX	XX	XXXXXXXXXXXXXXX	99-99-9999	99-99-9999	XXXXXXXXXX
-	XXXXXXXXXXXX	XXXXXXXXXX	XX	XX	XXXXXXXXXXXXXXX	99-99-9999	99-99-9999	XXXXXXXXXX
-	XXXXXXXXXXXX	XXXXXXXXXX	XX	XX	XXXXXXXXXXXXXXX	99-99-9999	99-99-9999	XXXXXXXXXX
-	XXXXXXXXXXXX	XXXXXXXXXX	XX	XX	XXXXXXXXXXXXXXX	99-99-9999	99-99-9999	XXXXXXXXXX
-	XXXXXXXXXXXX	XXXXXXXXXX	XX	XX	XXXXXXXXXXXXXXX	99-99-9999	99-99-9999	XXXXXXXXXX
-	XXXXXXXXXXXX	XXXXXXXXXX	XX	XX	XXXXXXXXXXXXXXX	99-99-9999	99-99-9999	XXXXXXXXXX
-	XXXXXXXXXXXX	XXXXXXXXXX	XX	XX	XXXXXXXXXXXXXXX	99-99-9999	99-99-9999	XXXXXXXXXX
-	XXXXXXXXXXXX	XXXXXXXXXX	XX	XX	XXXXXXXXXXXXXXX	99-99-9999	99-99-9999	XXXXXXXXXX
-	XXXXXXXXXXXX	XXXXXXXXXX	XX	XX	XXXXXXXXXXXXXXX	99-99-9999	99-99-9999	XXXXXXXXXX
-	XXXXXXXXXXXX	XXXXXXXXXX	XX	XX	XXXXXXXXXXXXXXX	99-99-9999	99-99-9999	XXXXXXXXXX
-	XXXXXXXXXXXX	XXXXXXXXXX	XX	XX	XXXXXXXXXXXXXXX	99-99-9999	99-99-9999	XXXXXXXXXX
-	XXXXXXXXXXXX	XXXXXXXXXX	XX	XX	XXXXXXXXXXXXXXX	99-99-9999	99-99-9999	XXXXXXXXXX
-	XXXXXXXXXXXX	XXXXXXXXXX	XX	XX	XXXXXXXXXXXXXXX	99-99-9999	99-99-9999	XXXXXXXXXX
-	XXXXXXXXXXXX	XXXXXXXXXX	XX	XX	XXXXXXXXXXXXXXX	99-99-9999	99-99-9999	XXXXXXXXXX
-	XXXXXXXXXXXX	XXXXXXXXXX	XX	XX	XXXXXXXXXXXXXXX	99-99-9999	99-99-9999	XXXXXXXXXX
-	XXXXXXXXXXXX	XXXXXXXXXX	XX	XX	XXXXXXXXXXXXXXX	99-99-9999	99-99-9999	XXXXXXXXXX
-	XXXXXXXXXXXX	XXXXXXXXXX	XX	XX	XXXXXXXXXXXXXXX	99-99-9999	99-99-9999	XXXXXXXXXX
-	XXXXXXXXXXXX	XXXXXXXXXX	XX	XX	XXXXXXXXXXXXXXX	99-99-9999	99-99-9999	XXXXXXXXXX
-	XXXXXXXXXXXX	XXXXXXXXXX	XX	XX	XXXXXXXXXXXXXXX	99-99-9999	99-99-9999	XXXXXXXXXX

ENTER S IN SEL FIELD TO VIEW DETAILED INFO FOR THE TRANSACTION

F2=MENU F3=RETURN F7=BWD F8=FWD F12=EXIT

- From this screen, you can change or delete the search criteria to initiate a new search. You can perform searches using the following criteria:

SSN, HICN, Reason, Status, Origin Date From, and Through

The dates in the ORIGIN DATE FROM and THROUGH fields default to the dates entered in the SEARCH ORIGIN DATE fields on the COB ECRS main menu screen. If you did not enter dates in those fields on the COB ECRS main menu screen, the fields on this screen default to the date 30 days prior to the current date and the current date.

Typing information in the appropriate fields and pressing [Enter] narrows or widens your search.

- Press [PF7] to scroll backward or [PF8] to scroll forward through the list of workers' compensation set-aside trust cases.
- If you want to view detailed information for a workers' compensation set-aside trust case, type **S** in the SEL field next to the case for which you want to view detailed information. Press [Enter]. The system displays the ECRS Workers' Compensation Set-Aside Detail screen for the selected case.
- If you want to exit the ECRS Workers' Comp Set-Aside List screen, press [PF2] to return to the ECRS main menu without retaining current search criteria, [PF3] to return to the ECRS main menu while retaining current search criteria, or [PF12] to exit ECRS.

### ECRS Workers' Comp Set-Aside List Screen Description

<b>ECRS Workers' Comp Set-Aside List Screen</b>	
<b>Field Name</b>	<b>Description</b>
STATUS	Status code entered as search criteria, if applicable. This field is updateable; enter a different status code to perform additional searches.
REASON	Reason code entered as search criteria, if applicable. This field is updateable; enter a different reason code to perform additional searches.
HICN	Health Insurance Claim Number entered as search criteria, if applicable. This field is updateable; enter a different HICN to perform additional searches.
SSN	Social Security Number entered as search criteria, if applicable. This field is updateable; enter a different SSN to perform additional searches.
DCN	Document Control Number entered as search criteria, if applicable. This field is updateable; enter a different DCN to perform additional searches.
ORIGIN DATE FROM	Starting date of date range entered as search criteria, if applicable. This field is updateable; enter a different From date in MMDDCCYY format to perform additional searches.
THROUGH	Ending date of date range entered as search criteria, if applicable. This field is updateable; enter a different Through date in MMDDCCYY format to perform additional searches.
SEL	Selection field. Type <b>S</b> in this field and press [Enter] to transport to the ECRS Workers' Compensation Set-Aside Detail screen. Type <b>D</b> in this field and press [PF5] to mark a workers' compensation set-aside trust case for deletion (valid only for cases with a status code of HD or NW).
HICN	Health Insurance Claim Number of injured individual, if available ( <i>protected field</i> )
SSN	Social Security Number of injured individual, if available ( <i>protected field</i> )
ST	Status of workers' compensation set-aside trust case ( <i>protected field</i> ). Valid values are:  CM    Completed HD    Hold IP    In process NW    New
RS	Reason for status ( <i>protected field</i> ). Valid values are:  01    Not yet read by COB 04    Sent to CWF 06    At EDB 11    Not yet eligible for Medicare 12    Needs diagnosis, used with HD status 13    Future-dated workers' compensation case, used with HD status 14    Duplicate request, development already in progress, used with HD status 50    Record applied at CWF with no errors 65    Deceased 67    No response from CWF 89    No update, below threshold, used with CM status

<b>ECRS Workers' Comp Set-Aside List Screen</b>	
<b>Field Name</b>	<b>Description</b>
DCN	Document Control Number entered by Regional Office ( <i>protected field</i> )
ORIGIN DATE	Date workers' compensation set-aside trust case was entered in MM-DD-CCYY format ( <i>protected field</i> )
LST UPDATE	Date workers' compensation set-aside trust case was last changed in MMDDCCYY format ( <i>protected field</i> )
USER ID	User ID of operator who last updated workers' compensation set-aside trust case ( <i>protected field</i> )

### Transportation

<b>ECRS Workers' Comp Set-Aside List Screen</b>	
<b>PF Key</b>	<b>Function</b>
02	Return to ECRS main menu, current search criteria is not retained
03	Return to ECRS main menu, current search criteria is retained
07	Scroll backward
08	Scroll forward
12	Exit ECRS



## Adding, Viewing, and Updating Workers' Compensation Set-Aside Trust Cases

**Note:** The ECRS Workers' Compensation Set-Aside Detail screen is for authorized CMS Regional Office users only. Medicare contractor users do not have access to this screen.

Use the ECRS Workers' Compensation Set-Aside Detail screens to add, view, and update a workers' compensation set-aside trust case. You can only update a case if you work in the Regional Office that entered it, and the case status is NW (new) or HD (hold). If the COB system has started processing the information, you cannot update the case.

Follow the steps below to add, view, or update a workers' compensation set-aside trust case. You only have the ability to modify cases that were added by your Regional Office.

1. From the COB ECRS main menu screen, type **09** in the SELECTION field and press [Enter]. The system displays the ECRS Workers' Compensation Set-Aside Detail, Page 1 of 2 screen, as shown in the example below.

```

ECRS WORKERS COMPENSATION SET-ASIDE DETAIL PAGE 1 OF 2
RO NUMBER: XXX STATUS: XX XXXXXXXX
USER ID: XXXXXXXX REASON: XX XXXXXXXX
ORIGIN DATE: 99-99-9999 UPDATE DATE: 99-99-9999

IN PROCESS: FINAL: APPROVED: DENIED:
DATE OF LOSS: EFFECTIVE (SETTLEMENT DATE):

NAME: DOB: SEX:
STATE: LEAD CONTRACTOR: MEDICARE BENE? Y/N: DOD:
SSN: HICN DCN

ADMINISTRATOR: AMOUNT: $ , , .
STREET:
CITY: ST: ZIP: PHONE:

ATTORNEY:
STREET:
CITY: ST: ZIP: PHONE:

DEFENDANT ATTY? Y/N:
DIAG:

DESCRIPTION:

F2=MENU F3=RETURN F8=FORWARD F12=EXIT
    
```

2. Type data in all of the required fields on the ECRS Workers' Compensation Set-Aside Detail screen. The required fields on this screen are:

- NAME
- DOB
- SEX
- STATE
- MEDICARE BENE?
- SSN, if MEDICARE BENE? = N
- HICN, if MEDICARE BENE? = Y
- ATTORNEY, STREET, CITY, ST, ZIP
- DATE OF LOSS
- EFFECTIVE (SETTLEMENT DATE), ADMINISTRATOR, if FINAL and APPROVED fields are marked
- DESCRIPTION, if DIAG fields are blank

After you type data in one field, press [Tab] to move the cursor to the next field.

- After typing data in all of the required fields, press [PF8]. The system displays the ECRS Workers' Compensation Set-Aside Detail, Page 2 of 2 screen, as shown in the example below.

```

ECRS WORKERS COMPENSATION SET-ASIDE DETAIL    PAGE 2 OF 2
RO NUMBER: XXX                               STATUS: XX XXXXXXXXX
USER ID: XXXXXXXX                             REASON: XX XXXXXXXXX
ORIGIN DATE: 99-99-9999

NAME: _____ DOB: _____ SEX: _
STATE: __ LEAD CONTRACTOR: _____ MEDICARE BENE? Y/N: _ DOD: _____
      SSN: _____ HICN _____ DCN _____

INSURER NAME: _____ INS TYPE: _ XXXXXXXXXXXXXXXXXXXX
STREET: _____
CITY: _____ ST: __ ZIP: _____ - _____
GROUP NO: _____ POLICY NO: _____

INSURED NAME: _____ INS REL: __ XXXXXXXXXXXXXXXXXXXX
EMPLOYER: _____
STREET: _____
CITY: _____ ST: __ ZIP: _____ - _____ PHONE: ____-____-____

F2=MENU F3=RETURN F5=UPDATE PF7=BACKWARD F12=EXIT

```

- Type data in the appropriate fields.
- After typing data in all of the appropriate fields, press [PF5]. The system adds or updates the workers' compensation set-aside trust case, then displays the message, "TRANSACTION COMPLETED SUCCESSFULLY."
- If you want to return to the ECRS Workers' Compensation Set-Aside Detail, Page 1 of 2 screen, press [PF7].

If you want to exit the ECRS Workers' Compensation Set-Aside Detail screens, press [PF2] to return to the ECRS main menu or [PF12] to exit ECRS.

### ECRS Workers' Compensation Set-Aside Detail, Page 1 of 2 Screen Description

```

ECRS WORKERS COMPENSATION SET-ASIDE DETAIL PAGE 1 OF 2
RO NUMBER: XXX STATUS: XX XXXXXXXX
USER ID: XXXXXXXX REASON: XX XXXXXXXX
ORIGIN DATE: 99-99-9999 UPDATE DATE: 99-99-9999

IN PROCESS: _ FINAL: _ APPROVED: _ DENIED: _
DATE OF LOSS: _____ EFFECTIVE (SETTLEMENT DATE): _____

NAME: _____ DOB: _____ SEX: _
STATE: _ LEAD CONTRACTOR: _____ MEDICARE BENE? Y/N: _ DOD: _____
SSN: _____ HICN _____ DCN _____

ADMINISTRATOR: _____ AMOUNT: $ _____
STREET: _____
CITY: _____ ST: _ ZIP: _____ PHONE: _____

ATTORNEY: _____
STREET: _____
CITY: _____ ST: _ ZIP: _____ PHONE: _____

DEFENDANT ATTY? Y/N: _
DIAG: _____

DESCRIPTION: _____
_____
_____
_____
F2=MENU F3=RETURN F8=FORWARD F12=EXIT
    
```

ECRS Workers' Compensation Set-Aside Detail Screen, Page 1 of 2	
Field Name	Description
RO NUMBER	Regional Office contractor number ( <i>protected field</i> )
STATUS	<p>Status of request (<i>protected field</i>). Valid values are:</p> <p>NW New, not yet processed by COB</p> <p>HD Hold, individual is not yet a Medicare beneficiary or the record is "in process" and a final determination has not been made on the case</p> <p>IP In process, record is being processed by COB</p> <p>CM Completed, applied response received from CWF or date of death entered on HD record</p> <p><b>Note:</b> You can update or delete requests when they are in NW (new) or HD (hold) status. After the record has been sent to CWF (status code IP, reason code 04), you cannot make further changes on the ECRS Workers' Compensation Set-Aside Detail screens. When COB receives an applied response from CWF, the system updates the record to status code CM (completed), reason code 50 (record applied to CWF without errors). Once a CM50 is applied to the record, you will need to request changes through a CWF assistance request.</p>
USER ID	Identification number of user currently logged on system ( <i>protected field</i> )

<b>ECRS Workers' Compensation Set-Aside Detail Screen, Page 1 of 2</b>	
<b>Field Name</b>	<b>Description</b>
REASON	Reason for status ( <i>protected field</i> ). Valid values are: 01 Not yet read by COB (used with status NW) 04 Sent to CWF (used with status IP) 06 Query sent to EDB for beneficiary information (used with status IP) 11 Not yet eligible for Medicare (used with status HD) 50 Record applied at CWF with no errors (used with status CM) 65 Deceased (used with status CM) 67 No response from CWF 89 No update, below threshold (used with status CM)
ORIGIN DATE	Date workers' compensation set-aside trust case was added by Regional Office ( <i>protected field</i> )
UPDATE DATE	Date workers' compensation set-aside trust case was updated by Regional Office ( <i>protected field</i> )
IN PROCESS	Indicates the workers' compensation set-aside arrangement has not been finalized. The system builds a regular workers' compensation record at CWF with the effective date equal to the date of loss or the date of Medicare entitlement. After entering, in-process records have a status of HD and a reason code of 50. You can update records that have the IN PROCESS indicator marked.
FINAL	Indicates the workers' compensation set-aside arrangement has been finalized. If the set-aside arrangement was approved, the system sends a workers' compensation set-aside record to CWF. If the DATE OF LOSS is less than the SETTLEMENT DATE, the system sends a regular workers' compensation record to CWF with the effective date equal to the date of loss or the date of Medicare entitlement and the termination date one day prior to the settlement date. The date of loss cannot be equal to or less than the settlement date.  Records with this indicator marked require the marking of either the APPROVED or DENIED indicators. Records with the FINAL and APPROVED indicators marked require information in the EFFECTIVE (SETTLEMENT DATE) and ADMINISTRATOR fields.  If the settlement arrangement was denied, the system sends a regular workers' compensation record to CWF with WCSA DENIED in the GROUP NAME field.  You cannot update records that have the FINAL indicator marked.
APPROVED	Indicates the workers' compensation set-aside arrangement has been approved. <i>Required field</i> if the FINAL indicator is marked and the DENIED field is blank. An indicator in this field <i>requires</i> information in the EFFECTIVE (SETTLEMENT DATE) and ADMINISTRATOR fields.
DENIED	Indicates the workers' compensation set-aside arrangement was denied. <i>Required field</i> if the FINAL indicator is marked and the APPROVED field is blank.
DATE OF LOSS	Start date of illness or injury in MMDDCCYY format ( <i>required field</i> ). You cannot future-date this field.
EFFECTIVE (SETTLEMENT DATE)	Start date of set-aside arrangement (equal to settlement date) in MMDDCCYY format. <i>Required field</i> if FINAL and APPROVED fields are marked.

<b>ECRS Workers' Compensation Set-Aside Detail Screen, Page 1 of 2</b>	
<b>Field Name</b>	<b>Description</b>
NAME	Name of injured individual in first name/middle initial/last name format <i>(required field)</i>
DOB	Injured individual's date of birth <i>(required field)</i>
SEX	Sex of beneficiary <i>(required field)</i> . Valid values are: M Male F Female U Unknown
STATE	Abbreviation of state in which injured individual resides <i>(required field)</i>
LEAD CONTRACTOR	Field is blank upon initial entry. The Regional Office can add the lead contractor number or let the system use the beneficiary state code logic to fill in the lead contractor number when the request is entered. The Regional Office can override this field when the status code of the request is NW (new) or HD (held).
MEDICARE BENE?	Allows Regional Office to indicate whether injured individual has Medicare coverage <i>(required field)</i> . Valid values are: Y Yes N No
DOD	Date of death. You can only enter a date in this field when updating a case. After you enter the date of death, the system updates the case with status code CM (complete), reason code 65 (deceased).
SSN	Social Security Number of injured individual. <i>Required field</i> if MEDICARE BENE? field contains a value of N.
HICN	Health Insurance Claim Number of injured individual. Type HICN without dashes, spaces, or other special characters. <i>Required field</i> if MEDICARE BENE? field contains a value of Y.
DCN	CMS Regional Office Document Control Number <b>Note:</b> Each submitted transaction should have a unique DCN.
ADMINISTRATOR	Name of arrangement administrator. At CWF, the system adds arrangement administrator information to the insurer fields and annotates it with TAD. <i>Required field</i> if FINAL and APPROVED fields are marked.
AMOUNT	Monetary amount of arrangement settlement
STREET	Arrangement administrator's street address
CITY	Arrangement administrator's city
ST	Arrangement administrator's state abbreviation
ZIP	Arrangement administrator's ZIP code
PHONE	Arrangement administrator's telephone number
ATTORNEY	Name of attorney <i>(required field)</i> . At CWF, the system adds attorney information to the employer fields.
STREET	Attorney's street address <i>(required field)</i>
CITY	Attorney's city <i>(required field)</i>

<b>ECRS Workers' Compensation Set-Aside Detail Screen, Page 1 of 2</b>	
<b>Field Name</b>	<b>Description</b>
ST	Attorney's state abbreviation ( <i>required field</i> )
ZIP	Attorney's ZIP code ( <i>required field</i> )
PHONE	Attorney's telephone number
DEFENDANT ATTY?	Indicates whether the attorney represents the claimant or the defendant. Defendant attorney information is not added to CWF. Values are: Y Attorney represents defendant N Attorney represents claimant
DIAG	Diagnosis codes. Enter as many as five codes.
DESCRIPTION	Describes illness or injury when diagnosis code is unknown. <i>Required field</i> if DIAG field is blank.

### Transportation

<b>ECRS Workers' Compensation Set-Aside Detail Screen, Page 1 of 2</b>	
<b>PF Key</b>	<b>Function</b>
02	Return to ECRS main menu
03	Return to previous level
08	Page forward to second page of screen
12	Exit ECRS

### ECRS Workers' Compensation Set-Aside Detail, Page 2 of 2 Screen Description

```

ECRS WORKERS COMPENSATION SET-ASIDE DETAIL PAGE 2 OF 2
RO NUMBER: XXX STATUS: XX XXXXXXXX
USER ID: XXXXXXXX REASON: XX XXXXXXXX
ORIGIN DATE: 99-99-9999

NAME: _____ DOB: _____ SEX: _
STATE: ___ LEAD CONTRACTOR: _____ MEDICARE BENE? Y/N: _ DOD: _____
SSN: _____ HICN _____ DCN _____

INSURER NAME: _____ INS TYPE: _ XXXXXXXXXXXXXXXXXXXX
STREET: _____
CITY: _____ ST: ___ ZIP: _____ - _____
GROUP NO: _____ POLICY NO: _____

INSURED NAME: _____ INS REL: _ XXXXXXXXXXXXXXXXXXXX
EMPLOYER: _____
STREET: _____
CITY: _____ ST: ___ ZIP: _____ - _____ PHONE: ___ - ___ - _____

F2=MENU F3=RETURN F5=UPDATE PF7=BACKWARD F12=EXIT
    
```

ECRS Workers' Compensation Set-Aside Detail Screen, Page 2 of 2	
Field Name	Description
RO NUMBER	CMS Regional Office contractor number ( <i>protected field</i> )
STATUS	Status of request ( <i>protected field</i> ). Valid values are: NW New, not yet processed by COB HD Hold, individual is not yet a Medicare beneficiary or the record is "in process" and a final determination has not been made on the case IP In process, record is being processed by COB CM Completed, applied response received from CWF or date of death entered on HD record  <b>Note:</b> You can update or delete requests when they are in NW (new) or HD (hold) status. After the record has been sent to CWF (status code IP, reason code 04), you cannot make further changes on ECRS. When COB receives an applied response from CWF, the system updates the record to status code CM (completed), reason code 50 (record applied to CWF without errors).
USER ID	Identification number of user currently logged on system ( <i>protected field</i> )
REASON	Reason for status ( <i>protected field</i> ). Valid values are: 01 Not yet read by COB (used with status NW) 04 Sent to CWF (used with status IP) 06 Query sent to EDB for beneficiary information (used with status IP) 11 Not yet eligible for Medicare (used with status HD) 50 Record applied at CWF with no errors (used with status CM) 65 Deceased (used with status CM) 67 No response from CWF 89 No update, below threshold (used with status CM)

<b>ECRS Workers' Compensation Set-Aside Detail Screen, Page 2 of 2</b>	
<b>Field Name</b>	<b>Description</b>
ORIGIN DATE	Date workers' compensation set-aside trust case was added by Regional Office ( <i>protected field</i> )
NAME	Name of injured individual in first name/middle initial/last name format ( <i>protected field</i> )
DOB	Injured individual's date of birth ( <i>protected field</i> )
SEX	Sex of beneficiary ( <i>protected field</i> ). Valid values are: M Male F Female U Unknown
STATE	Abbreviation of state in which injured individual resides ( <i>protected field</i> )
LEAD CONTRACTOR	Lead contractor number ( <i>protected field</i> )
MEDICARE BENE?	Allows Regional Office to indicate whether injured individual has Medicare coverage ( <i>protected field</i> ). Valid values are: Y Yes N No
DOD	Date of death ( <i>protected field</i> )
SSN	Social Security Number of injured individual ( <i>protected field</i> )
HICN	Health Insurance Claim Number of injured individual ( <i>protected field</i> )
DCN	CMS Regional Office Document Control Number ( <i>protected field</i> )
INSURER NAME	Name of insurer  <b>Note:</b> In the absence of trust administrator information, the system posts insurer information to CWF. If both trust administrator and insurer information exist, the trust administrator information takes precedence.
INS TYPE	Type of insurance. Valid values are: A Insurance or Indemnity (OTHER TYPES) B Group Health Organization (GHO) C Preferred Provider Organization (PPO) D Third Party Administrator arrangement under an Administrative Service Only (ASO) contract without stop loss from any entity (TPA/ASO) E Third Party Administrator arrangement with stop loss insurance issued from any entity (STOP LOSS TPA) F Self-Insured/Self-Administered (SELF-INSURED) G Collectively-Bargained Health and Welfare Fund (HEALTH/WELFAR) H Multiple Employer Health Plan with at least one employer who has more than 100 full- and/or part-time employees (EMPLOYER+100) I Multiple Employer Health Plan with at least one employer who has more than 20 full- and/or part-time employees (EMPLOYER+20) J Hospitalization Only Plan covering inpatient hospital services (HOSPITAL ONLY)



<b>ECRS Workers' Compensation Set-Aside Detail Screen, Page 2 of 2</b>	
<b>Field Name</b>	<b>Description</b>
INS TYPE (continued)	Type of insurance. Valid values (continued from previous page) are: K Medical Services Only Plan covering only non-inpatient medical services (MEDICAL ONLY) M Medicare Supplemental Plan, Medigap, Medicare Wraparound Plan or Medicare Carve Out Plan (SUPPLEMENTAL) Blank Unknown (UNKNOWN)
STREET	Insurer's street address
CITY	Insurer's city
ST	Insurer's state abbreviation
ZIP	Insurer's ZIP code
GROUP NO	Stores date of loss or date of injury at CWF  <b>Note:</b> If the date in this field is prior to the entitlement date, it indicates the actual date of loss in MM/DD/CCYY format.
POLICY NO	Indicates "set-aside trust" at CWF
INSURED NAME	Name of insured
INS REL	Relationship of insured to injured individual. Valid values are: B Beneficiary C Child E Employer F Father M Mother N Non-relative O Other relative S Spouse U Unknown
EMPLOYER	Employer's name
STREET	Employer's street address
CITY	Employer's city
ST	Employer's state abbreviation
ZIP	Employer's ZIP code
PHONE	Employer's phone number

**Transportation**

<b><i>ECRS Workers' Compensation Set-Aside Detail Screen, Page 2 of 2</i></b>	
<b>PF Key</b>	<b>Function</b>
02	Return to ECRS main menu
03	Return to previous level
05	Add/update case
07	Page backward to first page of screen
12	Exit ECRS

## Deleting a Workers' Compensation Set-Aside Trust Case

**Note:** The ECRS Workers' Compensation Set-Aside List screen is for authorized CMS Regional Office users only. Medicare contractor users do not have access to this screen.

Use the ECRS Workers' Compensation Set-Aside List screen to delete a workers' compensation set-aside trust case. You can only delete a case if you work in the Regional Office that entered it, and the case status is NW (new) or HD (hold). If the COB system has started processing the case, you cannot delete it.

Follow the steps below to delete a workers' compensation set-aside trust case. You only have the ability to delete cases that were added by your Regional Office.

1. From the COB ECRS main menu screen, type **10** in the SELECTION field, and type the search criteria in the appropriate fields. Press [Enter]. The system displays the ECRS Workers' Comp Set-Aside List screen, as shown in the example below.

ECRS WORKERS COMP SET-ASIDE LIST SCREEN								
STATUS: _____		REASON: _____		HICN: _____		SSN: _____		
ORIGIN DATE FROM: _____		THROUGH: _____		DCN: _____				
SEL	HICN	SSN	ST	RS	DCN	ORIGIN DATE	LST UPDATE	USER ID
-	XXXXXXXXXXXX	XXXXXXXXXX	XX	XX	XXXXXXXXXXXX	99-99-9999	99-99-9999	XXXXXXXXXX
-	XXXXXXXXXXXX	XXXXXXXXXX	XX	XX	XXXXXXXXXXXX	99-99-9999	99-99-9999	XXXXXXXXXX
-	XXXXXXXXXXXX	XXXXXXXXXX	XX	XX	XXXXXXXXXXXX	99-99-9999	99-99-9999	XXXXXXXXXX
-	XXXXXXXXXXXX	XXXXXXXXXX	XX	XX	XXXXXXXXXXXX	99-99-9999	99-99-9999	XXXXXXXXXX
-	XXXXXXXXXXXX	XXXXXXXXXX	XX	XX	XXXXXXXXXXXX	99-99-9999	99-99-9999	XXXXXXXXXX
-	XXXXXXXXXXXX	XXXXXXXXXX	XX	XX	XXXXXXXXXXXX	99-99-9999	99-99-9999	XXXXXXXXXX
-	XXXXXXXXXXXX	XXXXXXXXXX	XX	XX	XXXXXXXXXXXX	99-99-9999	99-99-9999	XXXXXXXXXX
-	XXXXXXXXXXXX	XXXXXXXXXX	XX	XX	XXXXXXXXXXXX	99-99-9999	99-99-9999	XXXXXXXXXX
-	XXXXXXXXXXXX	XXXXXXXXXX	XX	XX	XXXXXXXXXXXX	99-99-9999	99-99-9999	XXXXXXXXXX
-	XXXXXXXXXXXX	XXXXXXXXXX	XX	XX	XXXXXXXXXXXX	99-99-9999	99-99-9999	XXXXXXXXXX
-	XXXXXXXXXXXX	XXXXXXXXXX	XX	XX	XXXXXXXXXXXX	99-99-9999	99-99-9999	XXXXXXXXXX
-	XXXXXXXXXXXX	XXXXXXXXXX	XX	XX	XXXXXXXXXXXX	99-99-9999	99-99-9999	XXXXXXXXXX
-	XXXXXXXXXXXX	XXXXXXXXXX	XX	XX	XXXXXXXXXXXX	99-99-9999	99-99-9999	XXXXXXXXXX
-	XXXXXXXXXXXX	XXXXXXXXXX	XX	XX	XXXXXXXXXXXX	99-99-9999	99-99-9999	XXXXXXXXXX

ENTER S IN SEL FIELD TO VIEW DETAILED INFO FOR THE TRANSACTION

F2=MENU F3=RETURN F7=BWD F8=FWD F12=EXIT

2. From this screen, you can change or delete the search criteria to initiate a new search. You can perform searches using the following criteria:  
 SSN, HICN, Reason, Status, Origin Date From, and Through  
 Typing information in the appropriate fields and pressing [Enter] narrows or widens your search.
3. Press [PF7] to scroll backward or [PF8] to scroll forward through the list of workers' compensation set-aside trust cases.
4. Type **D** in the SEL field next to the workers' compensation set-aside trust case that you want to delete. Press [Enter]. The system marks the case for deletion.
5. If you want to exit the ECRS Workers' Comp Set-Aside List screen, press [PF2] to return to the ECRS main menu without retaining current search criteria, [PF3] to return to the ECRS main menu while retaining current search criteria, or [PF12] to exit ECRS.

**Note:** For the ECRS Workers' Comp Set-Aside List Screen Description, see page 2-53.

## Requesting Document Copies

Use the ECRS Document Copies Request screen to submit requests to the COB contractor for copies of documents related to a specific Data Match or MSP occurrence. Currently, only Data Match copies are available.

**Note:** The ECRS Document Copies Request screen is for Medicare contractors only. CMS users do not have access to this screen.

Follow the steps below to request a document copy.

1. From the COB ECRS main menu screen, type **03** in the SELECTION field and press [Enter]. The system displays the ECRS Document Copies Request screen, as shown in the example below.

ECRS DOCUMENT COPIES REQUEST		
CNTR NO. 99999	PHONE: ____ - ____ - ____	DCN: _____
CNTR REP.: _____		USER ID XXXXXXXX
SEND TO: _____		
_____		
_____		
_____		
DOCUMENT REQUESTED: ____ XXX		
BENE HICN: _____	SSN: ____ - ____ - ____	SOURCE: _____
NAME: _____		
STREET: _____		
CITY: _____ ST: ____ ZIP: _____		
MSP TYPE: _ XXXXXXXXXXXXXXX	EFF DT: _____	TERM DT: _____
EMPLR NAME: _____		EIN: _____
F2=MENU F3=RETURN F5=UPDATE F12=EXIT		

2. Type data in all of the required fields on the ECRS Document Copies Request screen. Required fields on this screen are:
  - PHONE
  - DCN
  - CNTR REP
  - SEND TO
  - DOCUMENT REQUESTED
  - BENE HICN
  - SOURCE
  - NAME
  - MSP TYPE
  - EFF DT
  - EIN, if document requested is DMQ (Data Match Questionnaire)

After you type data in one field, press [Tab] to move the cursor to the next field.

3. After typing data in all of the required fields, press [PF5]. The system sends the document copy request, then displays the message, "REQUEST HAS BEEN SENT."
4. If you want to exit the ECRS Document Copies Request screen, press [PF2] to return to the ECRS main menu or [PF12] to exit ECRS.

## ECRS Document Copies Request Screen Description

<b>ECRS Document Copies Request Screen</b>	
<b>Field Name</b>	<b>Description</b>
CNTR NO.	Five-digit number identifying the Medicare contractor ( <i>protected field</i> )
PHONE	Phone number of contractor representative ( <i>required field</i> )
DCN	Document Control Number assigned by contractor to correspondence and/or paperwork associated with this request ( <i>required field</i> )
CNTR REP.	Name of contractor representative to contact for further information and/or clarification regarding this request ( <i>required field</i> )
USER ID	User ID of operator who entered document copy request ( <i>protected field</i> )
SEND TO	Name and address of recipient or other instructions regarding where document copies should be sent ( <i>required field</i> )
DOCUMENT REQUESTED	Four-character code indicating documents requested ( <i>required field</i> ). Description of code displays next to value. Valid values are:  DEVL Copy of all development (letters and questionnaires) related to coverage indicated DMQ Copy of Data Match questionnaire RLSE Copy of attorney release form TRMA Copy of all documents related to trauma case indicated
BENE HICN	Health Insurance Claim Number for beneficiary ( <i>required field</i> ). Type HICN without dashes, spaces, or other special characters.
SSN	Social Security Number for beneficiary
SOURCE	Source for related MSP occurrence. <i>Required field</i> if document requested is DMQ (Data Match questionnaire). Valid values are:  B Data Match I (1989) D Data Match II (1991) T Data Match III (1993) U Data Match IV (1995) V Data Match V (1996) W Data Match VI (1997)
NAME	Name of beneficiary in first name/middle initial/last name format ( <i>required field</i> )
STREET	First and second lines of beneficiary's street address
CITY	Beneficiary's city
ST	Beneficiary's state
ZIP	Beneficiary's ZIP code

<b>ECRS Document Copies Request Screen</b>	
<b>Field Name</b>	<b>Description</b>
MSP TYPE	One-character code identifying type of MSP coverage ( <i>required field</i> ). Description of code displays next to value. Valid values are: A Working Aged B ESRD C Conditional Payment D Automobile Insurance, No Fault E Workers' Compensation F Federal (Public) G Disabled H Black Lung I Veterans L Liability
EFF DT	Effective date of MSP coverage in MMDDCCYY format ( <i>required field</i> )
TERM DT	Termination date of MSP coverage in MMDDCCYY format
EMPLR NAME	Name of employer providing group health insurance under which beneficiary is covered
EIN	Employer Identification Number. <i>Required field</i> if document requested is DMQ (Data Match questionnaire).

### Transportation

<b>ECRS Document Copies Request Screen</b>	
<b>PF Key</b>	<b>Function</b>
02	Return to ECRS main menu
03	Return to previous level
05	Send document copy request
12	Exit ECRS

## Viewing Lead Contractor Assignments

Use the ECRS MSP Lead Contractor Assignment screen to see cases assigned to a lead contractor for coordination of Medicare activities with other contractors and insurance companies.

**Note:** Only lead contractors have the ability to select cases from this screen.

If contractors are considered developing contractors for a case, they can research the lead contractor assignment from the MSP Developing Contractor Notification screen.

CMS users can view the case assignment list for any lead contractor by entering that contractor's number as search criteria.

Follow the steps below to view assignments for a lead contractor.

1. From the COB ECRS main menu screen, type **06** in the SELECTION field, and type search criteria in the SEARCH ORIGIN DATE FROM, THROUGH, and/or HICN fields. Press [Enter]. The system displays the ECRS MSP Lead Contractor Assignment screen showing records found in the COB database for the contractor matching the selection criteria entered. If no selection criteria were entered, the screen displays all assignments in the COB database for the contractor.

ECRS MSP LEAD CONTRACTOR ASSIGNMENT						
HICN:	CNTR:		ORIGIN DATE FROM:	THROUGH:		
SEL	HICN	BENEFICIARY	CONTR	TYPE	IN	EFF DATE
-	XXXXXXXXXXXXX	XXXXXXXXXXXXX X	XXXXX	X	XX	99-99-9999
-	XXXXXXXXXXXXX	XXXXXXXXXXXXX X	XXXXX	X	XX	99-99-9999
-	XXXXXXXXXXXXX	XXXXXXXXXXXXX X	XXXXX	X	XX	99-99-9999
-	XXXXXXXXXXXXX	XXXXXXXXXXXXX X	XXXXX	X	XX	99-99-9999
-	XXXXXXXXXXXXX	XXXXXXXXXXXXX X	XXXXX	X	XX	99-99-9999
-	XXXXXXXXXXXXX	XXXXXXXXXXXXX X	XXXXX	X	XX	99-99-9999
-	XXXXXXXXXXXXX	XXXXXXXXXXXXX X	XXXXX	X	XX	99-99-9999
-	XXXXXXXXXXXXX	XXXXXXXXXXXXX X	XXXXX	X	XX	99-99-9999
-	XXXXXXXXXXXXX	XXXXXXXXXXXXX X	XXXXX	X	XX	99-99-9999
-	XXXXXXXXXXXXX	XXXXXXXXXXXXX X	XXXXX	X	XX	99-99-9999
-	XXXXXXXXXXXXX	XXXXXXXXXXXXX X	XXXXX	X	XX	99-99-9999
-	XXXXXXXXXXXXX	XXXXXXXXXXXXX X	XXXXX	X	XX	99-99-9999
-	XXXXXXXXXXXXX	XXXXXXXXXXXXX X	XXXXX	X	XX	99-99-9999
-	XXXXXXXXXXXXX	XXXXXXXXXXXXX X	XXXXX	X	XX	99-99-9999
-	XXXXXXXXXXXXX	XXXXXXXXXXXXX X	XXXXX	X	XX	99-99-9999
-	XXXXXXXXXXXXX	XXXXXXXXXXXXX X	XXXXX	X	XX	99-99-9999
-	XXXXXXXXXXXXX	XXXXXXXXXXXXX X	XXXXX	X	XX	99-99-9999
-	XXXXXXXXXXXXX	XXXXXXXXXXXXX X	XXXXX	X	XX	99-99-9999
-	XXXXXXXXXXXXX	XXXXXXXXXXXXX X	XXXXX	X	XX	99-99-9999

KEY 1 IN THE SEL FIELD TO VIEW DEVL P CONR. KEY 2 TO VIEW WC DETAIL  
F2=MENU F3=RETURN F7=BWD F8=FWD F12=EXIT

2. Press [PF7] to scroll backward or [PF8] to scroll forward through the list of HICNs assigned to the lead contractor.
3. To search for all cases related to a specific beneficiary, type that beneficiary's HICN in the HICN field and press [Enter]. The system displays all cases for that beneficiary.

The dates in the ORIGIN DATE FROM and THROUGH fields default to the dates entered in the SEARCH ORIGIN DATE fields on the COB ECRS main menu screen. If you did not enter dates in those fields on the COB ECRS main menu screen, the fields on this screen default to the date 30 days prior to the current date and the current date. Change the dates in these fields and press [Enter] to narrow or widen your search.

4. If you want to see a list of developing contractors (those other than the lead that may be interested or involved in the MSP case) for a particular case, type **S** in the SEL field next to the case and press [Enter]. The system displays the ECRS Developing Contractors for Lead screen.
5. If you want to exit the ECRS MSP Lead Contractor Assignment screen, press [PF2] to return to the ECRS main menu without retaining current search criteria, [PF3] to return to the ECRS main menu while retaining current search criteria, or [PF12] to exit ECRS.

### ECRS MSP Lead Contractor Assignment Screen Description

<b>ECRS MSP Lead Contractor Assignment Screen</b>	
<b>Field Name</b>	<b>Description</b>
SEL	Selection field. Type <b>S</b> in this field and press [Enter] to display a list of developing contractors associated with this HICN.
HICN	Health Insurance Claim Number entered as search criteria, if applicable. This field is updateable; enter a different HICN to perform additional searches.
CNTR	Type a CMS-issued Medicare contractor number or your RO contractor number to search for assignment records for a specific contractor or your Regional Office.
ORIGIN DATE FROM	Starting date of date range entered as search criteria, if applicable. This field is updateable; enter a different From date in MMDDCCYY format to perform additional searches.
THROUGH	Ending date of date range entered as search criteria, if applicable. This field is updateable; enter a different Through date in MMDDCCYY format to perform additional searches.
HICN	Health Insurance Claim Number for MSP inquiry transaction ( <i>protected field</i> )
BENEFICIARY	First 16 characters of last name and first initial of beneficiary for case assigned to contractor ( <i>protected field</i> )
CONTR	Lead contractor number ( <i>protected field</i> )
TYPE	MSP type for case assigned to contractor ( <i>protected field</i> ). For a list of valid type values, see page 2-34.
IN	Indicates type of specialty case. Valid values are: CV      Change of venue was made from original lead contractor or RO DE      Non-EGHP record deleted in COB system NA      No action required for record (already investigated and resolved; COB contractor is only posting record to CWF) WC      Workers' Compensation Set-Aside Cases WU      California Workers' Compensation agreement Blank    No indicators apply
EFF DATE	Effective date of MSP coverage case assigned to contractor ( <i>protected field</i> )
ORIGN DATE	Originating date in MMDDCCYY format ( <i>protected field</i> )



**Transportation**

<b>ECRS MSP Lead Contractor Assignment Screen</b>	
<b>PF Key</b>	<b>Function</b>
02	Return to ECRS main menu, current search criteria is not retained
03	Return to ECRS main menu, current search criteria is retained
07	Scroll backward
08	Scroll forward
12	Exit ECRS

## Viewing Developing Contractors for a Lead Assignment

Use the ECRS Developing Contractors for Lead screen to see a list of contractors other than the lead contractor that may be interested or involved in the MSP case.

Follow the steps below to view developing contractors for a case.

1. From the COB ECRS main menu screen, type **06** in the SELECTION field, and type search criteria in the SEARCH ORIGIN DATE FROM, THROUGH, and/or HICN fields. Press [Enter]. The system displays the ECRS MSP Lead Contractor Assignment screen showing records found in the COB database for the contractor matching the selection criteria entered. If no selection criteria were entered, the screen displays all assignments in the COB database for the contractor.
2. From the ECRS MSP Lead Contractor Assignment screen, type **S** in the SEL field next to the appropriate case and press [Enter]. The system displays the ECRS Developing Contractors for Lead screen for the HICN selected. If there are no developing contractors for the selected HICN, the system displays a message stating so.

```

ECRS DEVELOPING CONTRACTORS FOR LEAD
ATTORNEY NAME : _____ PHONE NO : ____-____-____
INSURER NAME : _____ PHONE NO : ____-____-____

      HICN      BENEFICIARY      TYPE  EFF DATE  ORGN DATE
XXXXXXXXXXXX  XXXXXXXXXXXXXXXXXXXXXXXX X  X  99-99-9999  99-99-9999

      NUMBER  NAME                                PHONE
      XXXXX  XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX  999-999-9999
      XXXXX  XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX  999-999-9999
      XXXXX  XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX  999-999-9999
      XXXXX  XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX  999-999-9999
      XXXXX  XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX  999-999-9999
      XXXXX  XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX  999-999-9999
      XXXXX  XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX  999-999-9999
      XXXXX  XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX  999-999-9999
      XXXXX  XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX  999-999-9999
      XXXXX  XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX  999-999-9999
      XXXXX  XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX  999-999-9999
      XXXXX  XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX  999-999-9999
      XXXXX  XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX  999-999-9999
      XXXXX  XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX  999-999-9999
      XXXXX  XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX  999-999-9999
      XXXXX  XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX  999-999-9999

      F2=MENU F3=RETURN F7=BWD F8=FWD F12=EXIT
    
```

3. Press [PF7] to scroll backward or [PF8] to scroll forward through the list of developing contractors for a case.
4. If you want to view the next lead contractor assignment, press [Enter].
5. If you want to return to the ECRS MSP Lead Contractor Assignment screen, press [PF3].

If you want to exit the ECRS Developing Contractors for Lead screen, press [PF2] to return to the ECRS main menu or [PF12] to exit ECRS.

### ECRS Developing Contractors for Lead Screen Description

<b>ECRS Developing Contractors for Lead Screen</b>	
<b>Field Name</b>	<b>Description</b>
ATTORNEY NAME	Name of attorney as entered on original MSP inquiry or self report
PHONE NO	Phone number of attorney as entered on original MSP inquiry or self report
INSURER NAME	Name of insurer as entered on original MSP inquiry or self report
PHONE NO	Phone number of insurer as entered on original MSP inquiry or self report
HICN	Health Insurance Claim Number for MSP inquiry ( <i>protected field</i> )
BENEFICIARY	First 15 characters of last name and first initial of beneficiary for case assigned to contractor ( <i>protected field</i> )
TYPE	MSP type for case assigned to contractor ( <i>protected field</i> ). For a list of valid values, see page 2-34.
EFF DATE	Effective date of MSP coverage case assigned to contractor ( <i>protected field</i> )
ORIGN DATE	Originating date in MMDDCCYY format ( <i>protected field</i> )
<i>(DEVELOPING CONTRACTORS)</i>	
NUMBER	Contractor number of other Medicare contractors that may be interested or involved in the case assigned ( <i>protected field</i> )
NAME	Name of other Medicare contractors that may be interested or involved in the case assigned ( <i>protected field</i> )
PHONE	Phone number for other Medicare contractors that may be interested or involved in the case assigned ( <i>protected field</i> )

### Transportation

<b>ECRS Developing Contractors for Lead Screen</b>	
<b>PF Key</b>	<b>Function</b>
02	Return to ECRS main menu, current search criteria is not retained
03	Return to ECRS MSP Lead Contractor Assignment screen
07	Scroll backward
08	Scroll forward
12	Exit ECRS

## Viewing Notifications for Cases with Developing Contractors

Use the MSP Developing Contractor Notification screen to view cases in which the developing contractor or CMS Regional Office may have an interest or involvement, but the cases were assigned to another contractor for the coordination of Medicare activities.

Follow the steps below to view notifications for cases of interest to the developing contractor.

1. From the COB ECRS main menu screen, type **07** in the SELECTION field, and type search criteria in the SEARCH ORIGIN DATE FROM, THROUGH, and/or HICN fields. Press [Enter]. The system displays the ECRS MSP Developing Contractor Notification screen showing records found in the COB database for the contractor matching the selection criteria entered. If no selection criteria were entered, the screen displays all assignments in the COB database for the contractor.

ECRS MSP DEVELOPING CONTRACTOR NOTIFICATION						
HICN: _____	CNTR: 11111	ORIGIN DATE FROM: _____	THRU: 08/27/2002			
HICN	BENEFICIARY	TYPE	WC	EFF DATE	ORIG DATE	LEAD
111111111A	SMITH	M	L	01/01/2002	04/12/2002	22222
111111111A	SMITH	M	D	01/01/2002	04/12/2002	22222
222222222A	BROWN	L	L	Y 03/02/2002	04/10/2002	33333
333333333A	JONES	E	D	12/15/2001	12/27/2001	44444

F2=MENU F3=RETURN F7=BWD F8=FWD F12=EXIT

2. Press [PF7] to scroll backward or [PF8] to scroll forward through the list of notifications.
3. The dates in the ORIGIN DATE FROM and THROUGH fields default to the dates entered in the SEARCH ORIGIN DATE fields on the COB ECRS main menu screen. If you did not enter dates in those fields on the COB ECRS main menu screen, the fields on this screen default to the date 30 days prior to the current date and the current date. Change the dates in these fields and press [Enter] to narrow or widen your search.
4. If you want to exit the ECRS MSP Developing Contractor Notification screen, press [PF2] to return to the ECRS main menu without retaining current search criteria, [PF3] to return to the ECRS main menu while retaining current search criteria, or [PF12] to exit ECRS.

### ECRS MSP Developing Contractor Notification Screen Description

<b>ECRS MSP Developing Contractor Notification Screen</b>	
<b>Field Name</b>	<b>Description</b>
HICN	Health Insurance Claim Number entered as search criteria, if applicable. This field is updateable; enter a different HICN to perform additional searches.
CNTR	<b>Medicare Contractors:</b> Contractor number entered on login screen ( <i>protected field</i> )  <b>CMS Users:</b> Type a CMS-issued Medicare contractor number or your RO contractor number to search for developing records for a specific contractor or your Regional Office.
ORIGIN DATE FROM	Starting date of date range entered as search criteria, if applicable. This field is updateable; enter a different From date in MMDDCCYY format to perform additional searches.
THROUGH	Ending date of date range entered as search criteria, if applicable. This field is updateable; enter a different Through date in MMDDCCYY format to perform additional searches.
HICN	Health Insurance Claim Number for case ( <i>protected field</i> )
BENEFICIARY	First 15 characters of last name and first initial of beneficiary for case ( <i>protected field</i> )
TYPE	MSP type for case ( <i>protected field</i> ). For a list of valid type values, see page 2-34.
WC	Indicates whether case is a workers' compensation set-aside assignment. Valid values are:  Y        Yes, it is N        No, it is not Blank    Default
EFF DATE	Effective date of MSP coverage case ( <i>protected field</i> )
ORIGN DATE	Originating date in MMDDCCYY format ( <i>protected field</i> )
LEAD	Contractor number of Medicare contractor assigned as lead for case ( <i>protected field</i> )

**Transportation**

<b>ECRS MSP Developing Contractor Notification Screen</b>	
<b>PF Key</b>	<b>Function</b>
02	Return to ECRS main menu, current search criteria is not retained
03	Return to ECRS main menu, current search criteria is retained
07	Scroll backward
08	Scroll forward
12	Exit ECRS

## Viewing Notifications of Changed MSP Records

Use the MSP Changed Record Notification screen to view MSP occurrences in which the developing contractor or CMS Regional Office may have an interest or involvement, but the MSP occurrences have been added to, updated on, or deleted from CWF by the COB contractor.

Follow the steps below view notifications of changed MSP records.

1. From the COB ECRS main menu screen, type **08** in the SELECTION field, and type search criteria in the SEARCH ORIGIN DATE FROM, THROUGH, and/or HICN fields. Press [Enter]. The system displays the ECRS MSP Changed Record Notification screen showing records found in the COB database for the contractor matching the selection criteria entered. If no selection criteria were entered, the screen displays all notifications in the COB database for the contractor.

ECRS MSP CHANGED RECORD NOTIFICATION						
HICN: _____	CNTR: 11111	ORIGIN DATE FROM: _____	THRU: 08/27/2002			
HICN	BENEFICIARY	TYPE	EFF DATE	ORIG DATE	ACTION	
111111111A	SMITH	M L	01/01/2002	04/12/2002	ADD/UPDATE	
111111111A	SMITH	M D	01/01/2002	04/12/2002	ADD/UPDATE	
22222222A	BROWN	L L	03/02/2002	04/10/2002	ADD/UPDATE	
33333333A	JONES	E D	12/15/2001	12/27/2001	LEAD=55555	

F2=MENU F3=RETURN F7=BWD F8=FWD F12=EXIT

2. Press [PF7] to scroll backward or [PF8] to scroll forward through the list of notifications.
3. The dates in the LAST UPDATED FROM and THROUGH fields default to the dates entered in the SEARCH ORIGIN DATE fields on the COB ECRS main menu screen. If you did not enter dates in those fields on the COB ECRS main menu screen, the fields on this screen default to the date 30 days prior to the current date and the current date. Change the dates in these fields and press [Enter] to narrow or widen your search.
4. If you want to exit the ECRS MSP Changed Record Notification screen, press [PF2] to return to the ECRS main menu without retaining current search criteria, [PF3] to return to the ECRS main menu while retaining current search criteria, or [PF12] to exit ECRS.

## ECRS MSP Changed Record Notification Screen Description

<b>ECRS MSP Changed Record Notification Screen</b>	
<b>Field Name</b>	<b>Description</b>
HICN	Health Insurance Claim Number entered as search criteria, if applicable. This field is updateable; enter a different HICN to perform additional searches.
CNTR	<b>Medicare Contractors:</b> Contractor number entered on login screen ( <i>protected field</i> )  <b>CMS Users:</b> Type a CMS-issued Medicare contractor number or your RO contractor number to search for changed records for a specific contractor or your Regional Office.
LAST UPDATED FROM	Starting date of date range entered as search criteria, if applicable. This field is updateable; enter a different From date in MMDDCCYY format to perform additional searches.
THROUGH	Ending date of date range entered as search criteria, if applicable. This field is updateable; enter a different Through date in MMDDCCYY format to perform additional searches.
HICN	Health Insurance Claim Number for case ( <i>protected field</i> )
BENEFICIARY	First 15 characters of last name and first initial of beneficiary for case ( <i>protected field</i> )
TYPE	MSP type for case ( <i>protected field</i> ). For a list of valid type values, see page 2-34.
EFF DATE	Effective date of MSP coverage case ( <i>protected field</i> )
LAST UPDATE	Date notification record was last changed in MMDDCCYY format ( <i>protected field</i> )
ACTION	Action performed by COB Contractor on this occurrence ( <i>protected field</i> ). Valid values are:  ADDED            New occurrence added to CWF DELETED        Occurrence deleted from CWF UPDATED        Occurrence updated on CWF



**Transportation**

<b><i>ECRS MSP Changed Record Notification Screen</i></b>	
<b>PF Key</b>	<b>Function</b>
02	Return to ECRS main menu, current search criteria is not retained
03	Return to ECRS main menu, current search criteria is retained
07	Scroll backward
08	Scroll forward
12	Exit ECRS

**Notes:**

## Appendix A: ECRS CICS Error Messages

This appendix contains a chart of ECRS CICS error messages. The chart also provides you with actions to take to resolve the errors.

### ECRS CICS Error Message Chart

Message	Action
ACTION DO CANNOT BE COMBINED WITH OTHER ACTIONS	Correct action codes.
ACTION VP CANNOT BE COMBINED WITH OTHER ACTIONS	Correct action codes.
ALL EMPLOYER INFORMATION REQUIRED FOR EI (Employer Information) ACTION	Enter employer name and full address (street, city, state, and ZIP code).
AT LEAST 1 ACTION CODE MUST BE ENTERED	Enter one or more action codes.
BENEFICIARY MASTER RECORD NOT FOUND	Access CWF manually to retrieve the beneficiary's data, and then type the relevant information in the appropriate fields on the detail screens.
BENEFICIARY RECORD NOT FOUND – REMOTE HOST XX IS NOT AVAILABLE (where XX is the unavailable host ID)	Access CWF manually to retrieve the beneficiary's data, and then type the relevant information in the appropriate fields on the detail screens.
CANNOT SPECIFY S AND D SIMULTANEOUSLY	Correct the SEL field to either <b>Select a transaction</b> or <b>Delete a transaction</b> .
CANNOT USE MULTIPLE SEARCH SELECTIONS	Correct search criteria.
CHANGE OF VENUE NOT ALLOWED FOR WC SET-ASIDE CASE	Remove CV value from ACTION(S) field. Also remove values from CHANGE LEAD TO and SEND VENUE LETTER? Y/N fields.
CICS CONNECTIVITY ERROR PLEASE CONTACT YOUR HELP DESK TO VERIFY YOUR CICS CONNECTION WITH GHI CICS APPLICATION ID: XXXXCICS	Contact the Help Desk.
CLAIMS PENDING MUST BE Y OR N	Enter <b>Y</b> (yes) or <b>N</b> (no) for claims pending.
CONTRACTOR NUMBER ENTERED NOT FOUND	Enter valid contractor number.
CONTRACTOR NUMBER REQUIRED	Enter valid contractor number.
DESCRIPTION OF INJURY OR DIAGNOSIS CODE REQUIRED	Enter description of injury or valid diagnosis code.
DIAGNOSIS REQUIRED FOR DX (Change Diagnosis Code) ACTION	Enter valid diagnosis code.
DOB MUST BE LESS THAN CURRENT DATE	Enter valid date of birth.

Message	Action
ECRS TRANSACTION HAS BEEN TERMINATED	N/A
EFF DATE CANNOT BE GREATER THAN CURRENT DATE	Enter valid effective date.
EFF DATE CANNOT BE GREATER THAN TERM DATE	Enter valid effective date.
FIRST PAGE DISPLAYED	N/A
FOR DATA MATCH EIN IS REQUIRED	Enter employer's EIN.
FOR DATA MATCH EMPLOYEE NUMBER IS REQUIRED	Enter employee number.
FROM DATE CANNOT BE GREATER THAN THROUGH DATE	Correct either From date or Through date.
FUNCTION KEY NOT ACTIVE	N/A
HICN MUST BE AT LEAST 9 CHARACTERS	Enter valid HICN.
HIGHLIGHTED FIELDS ARE REQUIRED FOR SOURCE OF XXXX (Source Type)	Enter valid values in highlighted fields or change source type.
HIMR NOT FUNCTIONAL – LOCAL HOST CONNECTION IS NOT AVAILABLE	Access CWF manually to retrieve the beneficiary's data, and then type the relevant information in the appropriate fields on the detail screens.
ILL/INJ DATE AND MSP TYPE = X, DO NOT CORRESPOND (where X = A, B, or G)	Remove date from ILLNESS/INJURY DT field or change MSP TYPE to value other than A, B, or G.
INSURER INFO REQUIRED FOR II (Insurer Information) ACTION	Enter full address for insurer (street, city, state, and ZIP code).
INSURER NAME REQUIRED FOR II (Insurer Information) ACTION	Enter insurer name.
INVALID ACCESS CODE FOR SPECIFIED CONTRACTOR	Enter valid access code.
INVALID BENEFICIARY HIC NUMBER ENTERED	Access CWF manually to retrieve the beneficiary's data, and then type the relevant information in the appropriate fields on the detail screens.
INVALID COMBINATION OF SEARCH CRITERIA	Change search criteria or selection.
INVALID DATE – PLEASE ENTER MMDDCCYY FORMAT	Enter valid date in MMDDCCYY format.
INVALID DATE ENTERED	Enter valid date in MMDDCCYY format.
INVALID DATE FORMAT – PLEASE RE-ENTER MMDDCCYY	Enter valid date in MMDDCCYY format.
INVALID KEY WAS ENTERED	N/A
INVALID SELECTION ENTERED	Enter valid selection.
INVALID XXXXXXXX (Field Name)	Enter valid value for field specified.
LAST PAGE DISPLAYED	N/A
MORE THAN ONE REQUEST FOR DETAIL INFORMATION WAS FOUND	Type <b>S</b> and press [Enter] for only one record at a time.

Message	Action
MSP AUXILIARY DATA NOT FOUND	Access CWF manually to retrieve the beneficiary's data, and then type the relevant information in the appropriate fields on the detail screens.
NO PROCESSING REQUESTED	N/A
NO RECORDS FOUND MEETING SEARCH CRITERIA	Modify search criteria and initiate new search.
ONLY ONE VENUE CHANGE PERMITTED	Remove CV value from ACTION(S) field. Also remove values from CHANGE LEAD TO and SEND VENUE LETTER? Y/N fields.
PHP DATE REQUIRED FOR PH ACTION	Type Pre-paid Health Plan date in PHP DATE field and press [Enter].
PLEASE CORRECT HIGHLIGHTED FIELDS	Correct entries in highlighted fields.
PLEASE CORRECT STATUS FIELD	Enter valid status code.
PLEASE SPECIFY AT LEAST ONE SEARCH CRITERIA	Enter at least one search value.
PRESS ENTER TO SELECT	Type <b>S</b> and press [Enter] to request detailed information for a transaction.
PRESS PF5 TO SEND REQUEST	Press [PF5] to transmit document copy request.
PRESS PF5 TO UPDATE TRANSACTION	Press [PF5] to update transaction.
PRESS PF8 TO CONTINUE	Press [PF8].
RECORD CANNOT BE DELETED	Correct value in SEL field for highlighted transactions; you can only delete records in new (NW) status.
REQUEST HAS BEEN SENT	N/A
SSN REQUIRED FOR MX (SSN/HICN Mismatch) ACTION	Enter valid SSN.
STATUS SHOULD BE NEW OR HOLD TO UPDATE	N/A
TERM DATE CANNOT BE EQUAL TO EFF DATE	Change termination date or effective date.
TERM DATE REQUIRED FOR TD ACTION	Enter termination date.
TRANSACTION COMPLETED SUCCESSFULLY	N/A
USE S TO REQUEST DETAILED INFORMATION	Type <b>S</b> and press [Enter] to request detailed information for a transaction.
XXXXXXXX (Field Name) IS INVALID	Enter valid value for field specified.
XXXXXXXX (Field Name) IS REQUIRED	Enter value for field specified.
XXXXXXXX (Field Name) MUST BE NUMERIC	Change value in field specified to numbers only.
XXXXXXXX (Field Name) NOT NUMERIC	Change value in field specified to numbers only.

Message	Action
XXXXXXXX (Field Name) REQUIRED FOR DOCUMENT REQUEST OF XXXX (Request Type)	Enter valid value for field specified or change request type.
XXXXXXXX (Field Name) SEARCH CRITERIA INVALID FOR SELECTION	Change search criteria or selection.
XXXXXXXXXX (Field Name) REQUIRED FOR SOURCE OF XXXX (Source Type)	Enter valid value in field specified or change source type.

## Appendix B: Frequently Asked Questions (FAQs)

This appendix includes a list of frequently asked questions about ECRS, followed by answers to those questions.

### Am I Using the Correct Screen?

Main Menu Option	Screen Name	Use this screen to:
ECRS 01	CWF Assistance Request Detail	Update or delete a confirmed MSP record on CWF
ECRS 02	CWF Assistance Request List	<ul style="list-style-type: none"> <li>View a list of all CWF assistance requests submitted by the contractor</li> <li>Check the progress of a CWF assistance request transaction</li> </ul>
ECRS 03	Document Copies Request	Request copies of COB documents related to specific MSP records (currently, only the Data Match Questionnaires are available)
ECRS 04	MSP Inquiry Detail	Enter information about a possible MSP situation when there is no corresponding MSP record on CWF
ECRS 05	MSP Inquiry List	<ul style="list-style-type: none"> <li>View a list of all MSP inquiries submitted by the contractor</li> <li>Check the progress of an MSP inquiry</li> </ul>
ECRS 06	MSP Lead Contractor Assignment	View the lead contractor assignment for MSP record types D, E, and L that the COB contractor added to CWF (only displays records assigned to contractor that is signed on to ECRS)
ECRS 07	MSP Developing Contractor Notification	View cases in which the contractor may have an interest or involvement, but the cases were assigned to another contractor as lead (interest or involvement indicates that contractor submitted an ECRS MSP inquiry, ECRS CWF assistance request, or processed a claim triggering either first claim development or trauma code development)
ECRS 08	MSP Changed Record Notification	View a list of records that COB has added, updated, or deleted (only displays records for the contractor who may have an interest—i.e., sent an ECRS MSP inquiry, ECRS CWF assistance request, or processed a claim triggering either first claim development or trauma code development)

Main Menu Option	Screen Name	Use this screen to:
ECRS 09	Workers' Compensation Set-Aside Detail	Add, update, or delete a workers' compensation set-aside trust case
ECRS 10	Workers' Compensation Set-Aside List	<ul style="list-style-type: none"> <li>View a list of all workers' compensation set-aside trust cases</li> <li>Check the progress of a workers' compensation set-aside trust case</li> </ul>
ECRS 11	Workload Tracking Screen	<ul style="list-style-type: none"> <li>Review your contractor site's workload (for Medicare contractors)</li> <li>Review contractor workloads (for CMS users)</li> </ul>

## General Issues

### What are the operating hours for the ECRS application?

ECRS is available Monday through Friday, 8 a.m. to 8 p.m. Eastern Standard Time, except holidays.

### Do all contractors see the same exact information on ECRS or does it vary from state to state?

ECRS information is restricted by contractor number and access code. Contractors can only view information associated with their own contractor number and access code.

### Can users generate screen prints in ECRS?

The capability to do this depends on each user's local setup.

## MSP Inquiry and CWF Assistance Request Issues

### Are completed ECRS MSP inquiries and CWF assistance requests purged?

No. There is a date parameter on the ECRS screens where contractors can specify date ranges. Unless Medicare contractors change this parameter, they will only see the most recent 30 calendar days.

### When and how should contractors submit a MSP inquiry or a CWF assistance request?

Contractors should use the ECRS CWF Assistance Request Detail screens (option 01 from the ECRS main menu) for changes to existing CWF MSP auxiliary occurrences and the ECRS MSP Inquiry Detail screens (option 04 from the ECRS main menu) to submit an inquiry to the COB contractor about MSP coverages that are not yet documented at CWF.

### Does a contractor need to send three separate ECRS CWF assistance requests to delete three auxiliary records for the same beneficiary?

No. Medicare contractors can submit one ECRS CWF assistance request with the remark, "Delete All Occurrences," or they can note the other occurrence numbers requiring deletion.



**In the event a referral is sent via ECRS both through the CWF assistance request and MSP inquiry option, does ECRS have an edit in place that will find these duplicate records?**

ECRS does not have an edit in place to detect this potential duplicate situation. ECRS will recognize receipt of the two different referrals or inquiries when a Medicare contractor sends two referrals or inquiries for the same beneficiary; however, ECRS cannot recognize a duplicate when a referral and an inquiry are submitted for the same beneficiary (they are two different actions: one says change a record on CWF; the other says investigate an action on CWF).

**If a contractor has multiple contractor numbers, can they choose one to use consistently for ECRS MSP inquiries and CWF assistance request transactions?**

Contractors may choose to use one contractor number and one access code for multiple contractor numbers. However, the COB contractor lead assignments only appear under the Part A contractor number.

**Can contractors delete an ECRS MSP inquiry once it has been entered and is later found to contain an error?**

Medicare contractors can delete an ECRS MSP inquiry if they discover the error on the same day. If the error is not discovered on the same day, the contractor can notify their COB consortia contact.

**What ECRS action code should contractors use when they receive information regarding a termination date for a 77777 record that is more than six months from the date of accretion?**

Contractors can submit this through the ECRS 01 screen, using Action Code TD and entering the termination date to be applied in the termination date field on the CWF MSP auxiliary occurrence.

**Can contractors submit workers' compensation set-aside cases through the ECRS MSP Inquiry Detail Screens?**

Effective April 15, 2002, Medicare contractors can no longer submit workers' compensation set-aside cases to the COB contractor on behalf of their CMS Regional Office. The COB contractor has created specific set-aside screens for CMS RO users.

**Does the COB contractor view the COMMENTS field on the ECRS CWF Assistance Request Detail Screen and the ECRS MSP Inquiry Detail Screen?**

On the ECRS CWF Assistance Request Detail Screen, the COB contractor views the comments as necessary for each ECRS type as described on page 2-18. On the ECRS MSP Inquiry Detail Screen, the COMMENTS field has been removed and replaced with additional action and reason codes.

## Lead Contractor Issue

**How do Medicare contractors use ECRS screens 06–Lead Contractor Assignment and 07–Developing Contractor Notification to determine lead or possible interest in a liability, auto no-fault or workers' compensation case?**

If a HICN appears on screen 06, the viewing contractor is the lead contractor for that case. If a HICN appears on screen 07, the viewing contractor has been identified as an interested party for that case; and the contractor that has been assigned the lead is indicated to the far right side of that line.

## Notification Issues

**Will the records on ECRS 08–MSP Changed Record Notification screen include any update to an existing CWF MSP auxiliary occurrence by the COB contractor, or just those that were updated as a result of a non-ECRS referral, e.g., through trauma code or first claim development?**

The ECRS 08–MSP Changed Record Notification screen includes any update to an existing CWF MSP auxiliary occurrence by the COB contractor. The system only displays cases on this screen in which the contractor has an interest or involvement (which means that the contractor has submitted an ECRS MSP inquiry, ECRS CWF assistance request, or processed a claim that triggered first claim or trauma code development). Medicare contractors can use the ECRS 07–MSP Developing Contractor Notification screen to see cases in which the developing contractor may have an interest or involvement, but the cases were assigned to another contractor to lead coordination of Medicare activities.

**If a beneficiary's information is listed on the ECRS 07 screen, will it always appear on the ECRS 08 screen too?**

If the information is on the ECRS 07 screen, that means COB created a MSP type D, E, or L record for it after 1/08/01. This information will also be on the ECRS 08 screen.

**What does the TYPE field refer to on the ECRS 07 and 08 screens?**

This field refers to the MSP type for the MSP auxiliary occurrence applied to CWF by the COB contractor. MSP types D, E, and L are associated with screens 07 and 08.

## Appendix C: Glossary

<b>Action Codes</b>	Used to determine what information should be changed at CWF. For example, if the action code is MT, the system updates information in the MSP TYPE field at CWF.
<b>Assistance Request Transaction</b>	Request to add, update, or delete an existing CWF MSP auxiliary occurrence
<b>Bene</b>	Medicare beneficiary
<b>CMS</b>	Centers for Medicare & Medicaid Services, federal agency that administers the Medicare program
<b>COB</b>	Coordination of Benefits is a written statement that tells which plan or insurance policy pays first if two health plans or insurance policies cover the same benefits. If one of the plans is a Medicare health plan, federal law may decide who pays first.
<b>Contractor Number</b>	Unique five-digit number assigned to Medicare contractors by CMS. Transactions are entered and viewed in ECRS by contractor number.
<b>CWF</b>	Common Working File, the Medicare Part A/Part B benefit coordination system that uses localized databases maintained by a host contractor
<b>Data Match</b>	Process by which information on employers and employees is analyzed by CMS for use in contacting employers concerning possible periods of MSP
<b>DCN</b>	Document Control Number
<b>Developing Contractor</b>	Contractor that may have an interest or involvement in an MSP case that was assigned to another contractor for coordination of Medicare activities
<b>ECRS</b>	Electronic Correspondence Referral System allows Medicare contractors to enter requests online through CICS screens to change Data Match and IEQ MSP records on CWF. Request transactions are sent to the COB contractor, where a batch process reads the transactions and processes the requests.
<b>EIN</b>	Employer Identification Number
<b>HICN</b>	Health Insurance Claim Number
<b>IEQ</b>	Initial Enrollment Questionnaire, used to gather Medicare Secondary Payer information for newly-eligible beneficiaries
<b>Lead Contractor</b>	CMS-appointed Medicare intermediary that coordinates Medicare recovery activities for MSP cases with interested contractors, attorneys, insurance companies, and other liable entities

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<b>Medicare Contractor</b>	Organization contracting with CMS to process claims, pay for or provide medical services, or enhance the agency's capability to administer the Medicare program
<b>MSP</b>	Medicare Secondary Payer, statutory requirement that private or other government insurance plans or programs providing health care coverage of Medicare beneficiaries pay before Medicare
<b>MSP Inquiry Transaction</b>	Inquiry regarding possible MSP coverage
<b>Set-Aside Trust Case</b>	When a Workers' Compensation settlement includes compensation for future medical expenses, it is referred to as a "commutation" case. This type of settlement sets aside funds in a trust for payment of future medical needs that would otherwise be paid for by Medicare. Once these funds are depleted, Medicare begins to make payments for services related to the WC injury.
<b>SSN</b>	Social Security Number
<b>Venue Letter</b>	Letter forwarded from the COB contractor to notify an attorney, beneficiary, and/or insurer of a change in the lead contractor assignment. The letter documents the former lead contractor, the new lead contractor, and the effective date of the change.
<b>Workers' Compensation</b>	System of insurance that reimburses an employer for damages that must be paid to an employee for an injury that occurred during the course of employment

# Electronic Correspondence Referral System (ECRS)

## Quick Reference Card

Rev. 03-01/July 2003

GHI-DI-502-6.0

### CFW Assistance Request Codes

Enter CFW assistance requests for existing MSP records.

Required Fields on ECRS CFW Assistance Request Detail Screens	
Field	Description
ACTION(S)	Action codes
DCN	Document Control Number
ACTIVITY CODE	Activity code
SOURCE	Source of request information
BENE HICN	Beneficiary's Health Insurance Claim Number
NAME	Beneficiary's name
PAT REL	Patient relationship
MSP TYPE	Type of MSP coverage
EFF DT	Effective date of MSP coverage
AUX REC	Record number of MSP auxiliary occurrence at CWF
ORIG CNTR	Contract number of contractor that created original MSP occurrence at CWF
INS TYPE	Type of insurance

Required Fields for Source Codes	
Value	Required Fields
CHEK	CHECK DATE, CHECK AMOUNT, CHECK NO, INFMT NAME, STREET, CITY, ST, ZIP, INFMT REL
LTTR	INFMT NAME, STREET, CITY, ST, ZIP, INFMT REL

Action Codes	
Value	Description
AI	Change attorney information
CV	Change of venue
DE	Develop to employer
DI	Develop to insurer
DO	Mark occurrence for deletion
DR	Investigate/redevelop closed or deleted record
DX	Change diagnosis codes
EA	Change employer address
ED	Change effective date
EI	Change employer information
ES	Employer size below minimum (20 for working aged; 100 for disability)
II	Change insurer information
IT	Change insurer type
LR	Add duplicate liability record
MT	Change MSP type
MX	SSN/HICN mismatch
NR	Create duplicate no-fault record
PH	Add PHP date
PR	Change patient relationship
RR	Generate right-of-recovery letter to lead contractor
TD	Terminate open EGHP record with date less than six months prior to date of accretion
VP	Beneficiary has taken a vow of poverty

Required Fields for Action Codes		
Value	Required Fields	Description
AI	INFMT NAME, PHONE, STREET, CITY, ST, ZIP	Attorney information (when MSP TYPE = D, E, or L and INFMT REL = A)
CV	CHANGE LEAD TO, SEND VENUE LETTER? Y/N	New lead contractor number; venue letter indicator

Required Fields for Action Codes (continued)		
Value	Required Fields	Description
DX	DIAG	Diagnosis codes
ED	EFF DATE	Effective date
EI	EMPLR NAME, STREET, CITY, ST, ZIP, EIN, EMPLOYER NO Type data in all fields to update employer info at CWF.	Employer information
II	INSURER NAME If you leave the following fields blank, the system overwrites the previous value on the MSP auxiliary record at CWF: STREET, CITY, ST, ZIP, GROUP NO, POLICY NO, INSURED NAME, INS REL Type data in all fields to update insurer info at CWF. Leave all fields blank to delete insurer info at CWF.	Insurer name
IT	INS TYPE	Insurance type
MT	MSP TYPE	MSP type
MX	SSN	SSN/HICN mismatch
PH	PHP DATE	Pre-paid Health Plan date
PR	PAT REL	Patient relationship
TD	TERM DT	Termination date

### MSP Inquiry Codes

Enter inquiries to initiate MSP development.

**Note:** Action codes are *not required* for MSP inquiries.

Action Codes	
Value	Description
CA	Class action suit
CL	Closed or settled case
DE	Develop to the employer
DI	Develop to the insurer
SC	Suppress confirmation letter
SL	Suppress lead contractor assignment
SR	Suppress right of recovery letters

Required Fields for Action Codes	
Value	Required Fields
CA	BENE HICN, PAT REL, MSP TYPE (must = L), EFF DT, CA, **INFMT (attorney) NAME, STREET, CITY, ST, ZIP, *INSURER NAME, *INS TYPE, **STREET, CITY, ST, ZIP, DIAG
CL	BENE HICN, PAT REL, MSP TYPE (must = D, E, or L), EFF DT, TERM DATE, **INFMT (attorney) NAME, STREET, CITY, ST, ZIP, *INSURER NAME, *INS TYPE, **STREET, CITY, ST, ZIP, DIAG
DE	EMPLR NAME, STREET, CITY, ST, ZIP
DI	INSURER NAME, STREET, CITY, ST, ZIP
SC	BENE HICN, PAT REL, MSP TYPE, EFF DT, **INFMT (attorney) NAME, STREET, CITY, ST, ZIP, *INSURER NAME, *INS TYPE, **STREET, CITY, ST, ZIP, DIAG
SL	BENE HICN, PAT REL, MSP TYPE (must = D, E, or L), EFF DT, **INFMT (attorney) NAME, STREET, CITY, ST, ZIP, *INSURER NAME, *INS TYPE, **STREET, CITY, ST, ZIP, DIAG
SR	BENE HICN, PAT REL, MSP TYPE (must = D, E, or L), EFF DT, **INFMT (attorney) NAME, STREET, CITY, ST, ZIP, *INSURER NAME, *INS TYPE, **STREET, CITY, ST, ZIP, DIAG

\* INSURER NAME and INS TYPE are always required fields.

\*\*Attorney information is only required when additional insurer information (STREET, CITY, ST, ZIP) is not present. Likewise, additional insurer information is only required when attorney information is not present.

Required Fields for Source Codes	
Value	Required Fields
CHEK	DCN, SOURCE, BENE HICN, NAME, CHECK DATE, CHECK AMOUNT, CHECK NO, INFMT NAME, ADDR, CITY, ST, ZIP, INFMT REL <b>or</b> DCN, SOURCE, SSN, NAME, BENE STRT, CITY, ST, ZIP, CHECK DATE, CHECK AMOUNT, CHECK NO, INFMT NAME, ADDR, CITY, ST, ZIP, INFMT REL
LTTR	DCN, SOURCE, BENE HICN, NAME, INFMT NAME, ADDR, CITY, ST, ZIP, INFMT REL <b>or</b> DCN, SOURCE, SSN, NAME, BENE STRT, CITY, ST, ZIP, INFMT NAME, ADDR, CITY, ST, ZIP, INFMT REL
PHON	DCN, SOURCE, BENE HICN, NAME, MSP TYPE, INFMT NAME, ADDR, CITY, ST, ZIP, INFMT REL <b>or</b> DCN, SOURCE, SSN, NAME, BENE STRT, CITY, ST, ZIP, MSP TYPE, INFMT NAME, ADDR, CITY, ST, ZIP, INFMT REL
SCLM	DCN, SOURCE, BENE HICN, NAME <b>or</b> DCN, SOURCE, SSN, NAME, BENE STRT, CITY, ST, ZIP

### General Codes

The following codes apply to CWF assistance requests, MSP inquiries, and workers' compensation set-aside trust cases.

<b>Activity Codes</b>	
<b>Value</b>	<b>Description</b>
C	Claims (Pre-Payment) (22001)
D	Debt Collection (42021)
G	Group Health Plan (42003)
I	General Inquiry (42004)
N	Liability, No-Fault, Workers' Compensation, and Federal Tort Claim Act (FTCA) (42002)

<b>MSP Type Codes</b>	
<b>Value</b>	<b>Description</b>
A	Working Aged
B	End-Stage Renal Disease (ESRD)
C	Conditional Payment
D	Automobile Insurance, No Fault
E	Workers' Compensation
F	Federal (Public)
G	Disabled
H	Black Lung
I	Veterans
L	Liability

<b>Source Codes</b>	
<b>Value</b>	<b>Description</b>
CHEK	Unsolicited check
LTTR	Letter
PHON	Phone call
SCLM	Medicare Secondary Claim payment

<b>Status Codes</b>	
<b>Value</b>	<b>Description</b>
CM	Completed
DE	Delete (do not process) ECRS request
HD	Hold, individual not yet a Medicare beneficiary (WC)
IP	In process, being edited by COB
NW	New, not yet read by COB

<b>Reason Codes</b>	
<b>Value</b>	<b>Description</b>
01	Not yet read by COB, used with NW status
02	Being processed by COB, used with IP status
03	Under development by COB, used with IP status
04	Update sent to CWF, used with IP status
05	Error received from CWF, being resolved by COB contractor, used with IP status
06	Sent to EDB for beneficiary info, used with IP status
07	Auditor follow-up development in progress, used with IP status
10	Not processing
11	Not yet eligible for Medicare, used with HD status
12	Needs diagnosis, used with HD status (for WC set-aside trust cases only)
13	Future-dated workers' compensation case, used with HD status (for WC set-aside trust cases only)
14	Duplicate request, development already in process, used with HD status
50	Posted to CWF, response received with no errors, used with CM status
51	No changes (additions, modifications, or deletions) made to CWF, used with CM status
52	Returned--rejected by CWF, used with CM status
53	Returned--duplicate ECRS request, used with CM status
54	100 or more threshold met
55	20 or more threshold met
56	OBRA does not apply, no update
57	Record already updated
58	Non-compliant GHP
59	Employer verified existing record, no update
60	Invalid HICN
61	No Part A entitlement
62	Closed, no response to development
63	Development complete, no MSP
64	Letter sent
65	Deceased, used with CM status
66	ESRD/DIB conflict
67	No response from CWF
68	Closed for Self-Report
69	Developed to GHP, no response
70	Developed to non-EGHP, no response
71	Developed to beneficiary, no response
72	Developed to informant, no response
73	Medicare beneficiary retired
74	Spouse retired
75	GHP lifetime of yearly benefits past maximum amount
76	No coverage with insurance company
77	Medicare Supplemental Plan
78	Employer has less than 20 employees
79	Per employer, Medicare beneficiary is not covered under spouse's GHP
80	Employer has less than 100 employees
81	Medicare is primary due to ESRD coordination period

<b>Reason Codes (continued)</b>	
<b>Value</b>	<b>Description</b>
82	Per insurance, seasonal employee and not eligible for the month
83	Incoming request conflicts with information on file
84	Insufficient information to update CWF
85	Venue changed
86	Unable to verify address, used with CM status (for CWF assistant requests only)
87	MSP record exists, used with CM status (for MSP inquiries only)
88	No update, not lead contractor
89	No update, below threshold, used with CM status (for workers' compensation records only)

<b>Patient Relationship Codes</b>	
<b>Value</b>	<b>Description</b>
01	Patient is policy holder
02	Spouse
03	Natural child, insured has financial responsibility
04	Natural child, insured does not have financial responsibility
05	Stepchild
06	Foster child
07	Ward of the Court
08	Employee
09	Unknown
10	Handicapped dependent
11	Organ donor
12	Cadaver donor
13	Grandchild
14	Niece/nephew
15	Injured plaintiff
16	Sponsored dependent
17	Minor dependent of a minor dependent
18	Parent
19	Grandparent dependent
20	Not available

<b>Informant Relationship Codes</b>	
<b>Value</b>	<b>Description</b>
A	Attorney representing beneficiary
B	Beneficiary
C	Child
D	Defendant's attorney
E	Employer
F	Father

<b>Informant Relationship Codes (continued)</b>	
<b>Value</b>	<b>Description</b>
M	Mother
N	Non-relative
O	Other relative
P	Provider
R	Beneficiary representative (other than attorney)
S	Spouse
U	Unknown

<b>Relationship to Insured Codes</b>	
<b>Value</b>	<b>Description</b>
B	Beneficiary
C	Child
E	Employer
F	Father
M	Mother
N	Non-relative
O	Other relative
S	Spouse
U	Unknown

<b>Insurance Type Codes</b>	
<b>Value</b>	<b>Description</b>
A	Insurance or Indemnity (OTHER TYPES)
B	Group Health Organization (GHO)
C	Preferred Provider Organization (PPO)
D	Third Party Administrator arrangement under an Administrative Service Only (ASO) contract without stop loss from any entity (TPA/ASO)
E	Third Party Administrator arrangement with stop loss insurance issued from any entity (STOP LOSS TPA)
F	Self-Insured/Self-Administered (SELF-INSURED)
G	Collectively-Bargained Health and Welfare Fund (HEALTH/WELFARE)
H	Multiple Employer Health Plan with at least one employer who has more than 100 full-and/or part-time employees (EMPLOYER+100)
I	Multiple Employer Health Plan with at least one employer who has more than 20 full-and/or part-time employees (EMPLOYER+20)
J	Hospitalization Only Plan covering inpatient hospital services (HOSPITAL ONLY)
K	Medical Services Only Plan covering only non-inpatient medical services (MEDICAL ONLY)
M	Medicare Supplemental Plan, Medigap, Medicare Wraparound Plan, or Medicare Carve Out Plan (SUPPLEMENTAL)
Blank	Unknown (UNKNOWN)