Program Memorandum Intermediaries/Carriers	Department of Health & Human Services (DHHS) Centers for Medicare & Medicaid Services (CMS)
Transmittal AB-01-100	Date: JULY 26, 2001

CHANGE REQUEST 1775

SUBJECT: CWF Health Insurance Master Record Redesign & Beneficiary Master File Expansion

HIMR Redesign

The Common Working File's (CWF) Health Insurance Master Record (HIMR) Inquiry modules are being restructured for expansion, better performance, and ease of maintenance. The current HIMR process presents a very busy screen (see Attachment A), and needs to be expanded to allow for future growth. The HIMR modules contain patched and repetitious code in numerous places. The code must be rewritten to be more modular and efficient.

This change involves HIMR screen expansions and introduces a 'MENU' like approach to HIMR. The intent of the redesign is to provide HIMR with flexibility and growth potential with minimal impact to existing features employed by end-users to inquire against HIMR related files.

Attachments B – E are proposed versions of the new screens. A new layer is being added to the current process in that an initial screen is presented to the end-user, Attachment B, where a specific information category will be selected. Depending on the selection, the appropriate new screen will be presented, Attachments C, D or E. From these screens the end-user will simply enter the specific information requested - much like the current process. From a functionality perspective, there should not be any change in the flow of information between the end-user and the respective data files, i.e., function keys should retain present functionality and navigation between the screens should remain the same.

Beneficiary Master File Expansion

CWF is also modifying its internal Beneficiary Master file. The CWF Beneficiary Master file is at its maximum physical record length of 32K. The beneficiary record contains history claim pointers that link a beneficiary to its history claims. The claims history files are entry sequenced and access to them can only be made through reading the beneficiary pointers. The current Beneficiary Master record can only house 700 inpatient, 700 outpatient/home health, 700 hospice and 1000 Part B and Durable Medical Equipment (DME) claim pointers. Therefore, with each claim type, CWF can only store and retrieve a fixed number of claims. Future expansions to increase the pointers on the beneficiary record are not possible, and once the maximum number of pointers is stored, all subsequent records are dropped.

Beneficiary Master file will be enhanced to contain a maximum of 2900 pointers for each type of claim. This improvement will be done by splitting the fixed beneficiary information and the claim pointer information into two physical files. The fixed beneficiary record will contain all beneficiary information, and the pointer record will contain a unique record for each claim type.

The home health and DME pointers will be split into separate pointer records. This will require new home health HIMR transactions. No new DME HIMR transactions will be needed as they already exist. The new home health transaction IDs are:

  HHAL - Home Health Listing (Attachment F)
  HHAC-Home Health Summary (Attachment G)
  HHAH-Home Health History (Attachment H)
  ARCA-Archive Listing for Home Health (Attachment I)

CMS-Pub. 60AB

The new HIMR header screen will list each of the claim pointer types including the home health breakout (Attachment J).

Additional information on the HIMR Redesign can be found in CWF CR# 20358 in Infoman. Additional information on the Beneficiary Master file modification can be found in CWF CR# 20357 in Infoman.

The *effective date* for this Program Memorandum (PM) is January 1, 2002.

The *implementation date* for this PM is January 1, 2002.

These instructions should be implemented within your current operating budget.

This PM may be discarded after January 1, 2003.

If you have any questions, contact John Cain at (410) 786-6690, or Leslie Engel at (410) 786-6355.

Attachments

Attachment A -- Current HIMR Screen:

```
MENU                        HIMR MAIN MENU                 PAGE   1 OF   1

INQUIRY TYPE       HIC                      HOST ID          SEX
ICN             FROM(SRCH) DTE          THRU(SRCH) DTE
INQUIRY TYPES:                     HOST IDS: GL, GW, KS, MA, NE, PA, SE, SO, SW
  BENEFICIARY INFORMATION               HISTORY INQUIRIES AND DISPLAY/REQUEST
   BENA  I/P SPELL + CATASTROPHIC          RETRIEVAL OF ARCHIVED CLAIM
   BENB  PT B DEDUCTIBLE + LIMITS          (LIST, SUMMARY, FULL, ARCHIVE)
   MSPA  MSP SUMMARY DISPLAY        INPATIENT   INPL   INPA   INPH   ARCI
   MSPD  MSP DETAIL DISPLAY         OUTPATIENT  OUTL   OUTP   OUTH   ARCO
   GHOD  GHO ENROLLMENT             HOSPICE     HOSL   HOSC   HOSH   ARCH
   GPRO  GHO PRORATED DATA          PART B      PTBL   PTBC   PTBH   ARCB
   HOSP  HOSPICE ENROLLMENT         DMEPOS      DMEL   DMEC   DMEH   ARCD
   HOSS  HOSPICE SUMMARY DISPLAY    PAID CLAIMS PCHL          PCHD
   HHBP  HOMEHEALTH BENEFIT PERIODS    OTHER INFORMATION INQUIRIES
   SURG  SURGERY INFORMATION        CLIA  CLINICAL LAB AND PHYS OWNERSHIP DATA
   ESRD  END STAGE RENAL DISEASE    MAMI  MAMMOGRAPHY CERTIFICATION INQUIRY
   XREF  HIC CROSS REFERENCE        HCPI  HCPCS INQUIRY
   CMNA  DMEPOS CMN DISPLAY         HMOI  HMO ADDRESS INQUIRY
   TNIF  NOT IN FILE STATUS         LUNG  LUNG VOLUME REDUCTION
   CNCR  CANCER SCREENING DATA      RNHC  RELIGIOUS NONMEDICAL HEALTH CARE
   HHEH  HOME HEALTH EPISODES       MCCD  COORDINATED CARE DEMONSTRATION


         F2=MENU F3=RETURN F4=BENA F5=BENB F12=EXIT          04/27/01
```

Attachment B -- Proposed HIMR Main Menu Screen:

```
HMR1                        HIMR MAIN MENU                    DATE: 05/04/2001

                            INQUIRE SELECTIONS

__  BENEFICIARY INFORMATION
__  HISTORY, DISPLAY/REQUESTS & ARCHIVIED CLAIMS RETRIEVAL
__  AUXILIARY/OTHER INFORMATION












SELECT BY KEYING 'X' NEXT TO CATEGORY AND THEN PRESS ENTER
```

This screen is the Main Menu Screen. It is initiated via transaction HMR1. From this screen the end-user selects the category in which further inquiries will be made by placing an 'X' next to the category and pressing the ENTER key. This screen is then replaced with either of the next three screens depending upon the category selected.

Attachment C -- Proposed HIMR Beneficiary Information Screen:

```
HMR2                      BENEFICIARY INFORMATION              DATE: 05/04/2001

INQUIRY TYPE: ____     HIC: _____     HOST ID: __    SEX: _

INQUIRY TYPES   BENEFICIARY INFORMATION

  BENA          I/P SPELL + CATASTROPHIC
  BENB          PT B DEDUCTIBLE + LIMITS
  TNIF          TRUE NOT IN FILE STATUS












HOST IDS: GL, GW, KS, MA, NE, PA, SE, SO, SW

F2=MAIN MENU   F3=RETURN   F4-BENA   F5=BENB   F12=EXIT
```

Beneficiary Inquiries are obtained via this screen. From this screen the end-user supplies the INQUIRY TYPE and the HIC number for the desired information. HOST ID is an optional enterable field. Once the key information is entered, the end-user presses the ENTER key to obtain the associated information for the HIC number in question.

Attachment D -- Proposed HIMR History Display/Request & Archived Claims Retrieval Screen:

```
HMR3    HISTORY, DISPLAY/REQUESTS & ARCHIVED CLAIMS RETRIEVAL  DATE: 05/04/2001

INQUIRY TYPE: ____    HIC: _____    HOST ID: __    SEX: _
ICN: _____    FROM DATE: _____    THRU DATE: _____

                   HISTORY INQUIRIES AND DISPLAY/REQUEST
                        RETRIEVAL OF ARCHIVED CLAIM
 INQUIRY TYPES:  (LIST, SUMMARY, FULL, ARCHIVE)
 INPATIENT        INPL    INPA    INPH    ARCI
 OUTPATIENT       OUTL    OUTP    OUTH    ARCO
 HOSPICE          HOSL    HOSC    HOSH    ARCH
 PART B           PTBL    PTBC    PTBH    ARCB
 DMEPOS           DMEL    DMEC    DMEH    ARCD
 PAID CLAIMS      PCHL            PCHD
 HOME HEALTH       HHAL    HHAC      HHAH     ARCA




HOST IDS: GL, GW, KS, MA, NE, PA, SE, SO, SW

F2=MAIN MENU    F3=RETURN    F12=EXIT
```

This screen enables the end-user to obtain information from History, Display/Requests & Archived Claims Retrieval. It functions similar to previous screens in that the end-user supplies the INQUIRY TYPE, the HIC number and optionally HOST ID, SEX, ICN, and FROM & THRU DATES. By pressing the ENTER key the desired information is gathered and returned to the end-user.

Attachment E -- Proposed HIMR Auxiliary/Other Information Screen:

```
HMR4                      AUXILIARY/OTHER INFORMATION              DATE: 05/04/2001

INQUIRY TYPE: ____     HIC: _____     HOST ID: __    SEX: _

INQUIRY TYPES AND DESCRIPTION:         INQUIRY TYPES AND DESCRIPTION:
 BOIA    BENEFICIARY OTHER INSURANCE     MCCD  COORDINATED CARE DEMO
 CLIA  CLINICAL LAB & PHYS OWNERSHIP     MSPA  MSP SUMMARY DISPLAY
 CMNA  DMEPOS CMN DISPLAY                MSPD  MSP DETAIL DISPLAY
 CNCR  CANCER SCREENING DATA             RNHC  RELIGIOUS NONMEDICAL HEALTH CARE
 ESRD  END STAGE RENAL DISEASE           SURG  SURGERY INFORMATION
 GHOD  GHO ENROLLMENT                    XREF  HIC CROSS REFERENCE
 GPRO  GHO PRORATED DATA
 HCPI  HCPCS
 HHBP  HOMEHEALTH BENEFIT PERIODS
 HHEH  HOME HEALTH EPISODES
 HMOI  HMO ADDRESS
 HOSP  HOSPICE ENROLLMENT
 HOSS  HOSPICE SUMMARY DISPLAY
 LUNG  LUNG VOLUME REDUCTION
 MAMI  MAMMOGRAPHY CERTIFICATION



HOST IDS: GL, GW, KS, MA, NE, PA, SE, SO, SW

F2=MAIN MENU   F3=RETURN   F12=EXIT
```

This screen is used to obtain information from the Auxiliary/Other associated files. Like
the previous screens the end-user need only provide the INQUIRY TYPE and where
applicable the HIC Number and HOST ID. SPECIAL NOTE - there are some Auxiliary
files that only require the INQUIRY TYPE field. By pressing the ENTER key, the end-
user receives the associated auxiliary file information relative to the HIC number
supplied.

Attachment F -- New HIMR Home Health Listing Screen:

```
HHAL                    HHA CLAIM LIST              PAGE    1 OF ____
HIC  _____                           DOB _____   SEX _
CORR _____      NAME _____  DOD _____  SOURCE _
MSP 3 HHB 0
            INP 0000 OUT 0000 HHA 0011 HOS 0699 PTB 0000 DME 0000 BLK N

     FROM (SRCH) DTE    _____                                      M
REC        ICN             FROM    THRU DED INTR     PROV      DOA CANC S
                           DATE    DATE                            IND  P
001 _____  _____  _____ _ _____  _____ _____ _ _
002 _____  _____  _____ _ _____  _____ _____ _ _
003 _____  _____  _____ _ _____  _____ _____ _ _
004 _____  _____  _____ _ _____  _____ _____ _ _
005 _____  _____  _____ _ _____  _____ _____ _ _
006 _____  _____  _____ _ _____  _____ _____ _ _
007 _____  _____  _____ _ _____  _____ _____ _ _
008 _____  _____  _____ _ _____  _____ _____ _ _
009 _____  _____  _____ _ _____  _____ _____ _ _
010 _____  _____  _____ _ _____  _____ _____ _ _
011 _____  _____  _____ _ _____  _____ _____ _ _
012 _____  _____  _____ _ _____  _____ _____ _ _
013 _____  _____  _____ _ _____  _____ _____ _ _
_____

    F2=MENU F3=RETURN F4=BENA F5=BENB F7=BWD F8=FWD F12=EXIT    _____
```

Attachment G -- New HIMR Home Health Summary Screen:

```
HHAC                    HHA SUMMARY RECORDS          PAGE   1 OF ____
HIC  _____                            DOB _____  SEX _
CORR _____      NAME _____   DOD _____   SOURCE _
MSP 3 HHB 1
        INP 0000 OUT 0000 HHA 0011 HOS 0000 PTB 0000 DME 0000     BLK N
REC   FROM (SRCH) DTE _____
001  ICN _____      PROV _____     FROM DTE _____
     INTER _____   CASH DED ____ PAT STAT __ HH VISIT   THRU DTE _____
     BLD: DED       FURN      REPL         MED EXP
     AUTO ADJ _ RIC _ HH    OP _ PSYCH EXP _____   SRCE _ TRANS  _ MSP
     DOA _____ FORM _____ CANC        TOT CHRG
002  ICN _____      PROV _____     FROM DTE _____
     INTER _____   CASH DED ____ PAT STAT __ HH VISIT   THRU DTE _____
     BLD: DED       FURN      REPL         MED EXP
     AUTO ADJ _ RIC _ HH    OP _ PSYCH EXP _____   SRCE _ TRANS  _ MSP
     DOA _____ FORM _____ CANC        TOT CHRG
003  ICN _____      PROV _____     FROM DTE _____
     INTER _____   CASH DED ____ PAT STAT __ HH VISIT   THRU DTE _____
     BLD: DED       FURN      REPL         MED EXP
     AUTO ADJ _ RIC _ HH    OP _ PSYCH EXP _____   SRCE _ TRANS  _ MSP
     DOA _____ FORM _____ CANC        TOT CH


        F2=MENU F3=RETURN F4=BENA F5=BENB F7=BWD F8=FWD F12=EXIT
```

Attachment H -- New HIMR Home Health History Screen:

```
HHAH                    HHA CLAIM HISTORY          PAGE   1 OF   11
HIC  _____                           DOB _____   SEX _
CORR _____    NAME _____   DOD _____  SOURCE _
MSP 3 HHB 1
        INP 0000 OUT 0000 HHA 0011 HOS 0000 PTB 0000 DME 0000    BLK N
ICN _____ PROV _____ INTER      FROM DTE __/__/__
CANCEL ADJ CODE                              THRU DTE __/__/__
ASSOC ADJ CODE                      BILL     PAT STAT    RIC
ACT CD                      DOA          FORM _____  CANC
EXCP/NONEXCP IND _            ESRD REIMB METH
PMT DIST PROV                TOT CHRG _____
RECEIVED DTE            PMT DIST PAT
REIMB AMT               APPROVED DTE           SCHED PMT DTE
                       EXP SUB DED _____ DEMO NUMBER __
PRINC DIAG CD:    _____            IDE NUMBER 1) _____
OTHER DIAG CD 2: _____ 3: _____ 4: _____ 5: _____    2) _____
              6: _____ 7: _____ 8: _____ 9: _____     3) _____
EXT-INJ-DIAG:                                                4) _____
PRINC PROC CD/DTE:   _____  _____                           5) _____
OTHER PROC CD/DTE: 2: _____  _____    3: _____ _____    6) _____
                   4: _____  _____    5: _____ _____    7) _____
                   6: _____  _____

        F2=MENU F3=RETURN F4=BENA F5=BENB F7=BWD F8=FWD F12=EXIT
```

Attachment I -- New HIMR Archived Home Health History Claims Screen:

```
ARCA         DISPLAY & UPDATE ARCHIVED CLAIM POINTERS    PAGE   1 OF ____
HIC  _____                              DOB _____   SEX _
CORR _____     NAME _____  DOD _____  SOURCE _
MSP 3 GHO 0 HOS 1 SUR 0 XRF 0 ESR 0 CMN 0 REP 2 CNR 0 HHB 0 RNH 0 HHE 0
          INP 0000 OUT 0000 HHA 0000 HOS 0000 PTB 0000 DME 0000  BLK N
ARCHIVED RECS: INPA ____   OUTP ____   HOSC ____   PTBC ____   DMEC ____
          DATE RANGE - FROM _____  THRU _____
 SEL  FROM DTE  THRU DTE      CURRENT STATUS     EXPIRATION   ARCHIVED
  _   TO SELECT ALL RECORDS

  _   _____ _____    _____     _____   _____
  _   _____ _____    _____     _____   _____
  _   _____ _____    _____     _____   _____
  _   _____ _____    _____     _____   _____
  _   _____ _____    _____     _____   _____
  _   _____ _____    _____     _____   _____
  _   _____ _____    _____     _____   _____
  _   _____ _____    _____     _____   _____
  _   _____ _____    _____     _____   _____
  _   _____ _____    _____     _____   _____
  _   _____ _____    _____     _____   _____
  _   _____ _____    _____     _____   _____
_____
     F2=MENU F3=RETURN F4=BENA F5=BENB F7=BWD F8=FWD F12=EXIT
```

Attachment J -- Proposed HIMR Header Screen:

```
XXXX                    XXXXXXXXXXXXXXXXXXXXXXXXX            PAGE    1
 HIC  012123451A                    LOCAL HOST            DOB 01/01/1901
 CORR 012123451A      NAME CHAS.L,                        DOD


 MSP 3 HOS 1
                      INP 0003 OUT 0000 HHA 0000 HOS 0000 PTB 0000 DME 0000
```