Program Memorandum Intermediaries/Carriers	Department of Health & Human Services (DHHS) Centers for Medicare & Medicaid Services (CMS)
Transmittal AB-01-147	Date: OCTOBER 15, 2001

CHANGE REQUEST 1903

This Program Memorandum (PM) supersedes the ECRS manual reference in AB-01-114, dated August 16, 2001. Please discard the ECRS manual reference in AB-01-114 immediately.

SUBJECT: Electronic Correspondence Referral System (ECRS) User Manual 3.0.1 and ECRS Quick Reference Card

On September 20, 2001, the Coordination of Benefits (COB) Contractor shipped ECRS Version3.0.1, a revised test version of ECRS 3.0 to all data centers for additional testing. Version 3.0.1 will be moved into a production environment for Medicare contractor use as of October 15, 2001. After implementation, ECRS Version 3.0.1 will be the only ECRS software version supported by the COB Contractor.

The ECRS Version 3.0.1 manual, attachment 1 is being supplied for Medicare contractor use for maneuvering through the systems application processes. Attachment 2 is an ECRS Quick Reference Card to quickly locate selection options, required fields and descriptions, and value codes contained within ECRS 3.0.1.

Instruction for Printing and Folding Quick Reference Card:

To print the ECRS Quick Reference Card:

1) When printing the ECRS Quick Reference Card, print only the first page, then manually feed the paper back into your printer to print the second page.

To fold the ECRS Quick Reference in a Z-fold:

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) 615-4647 or (212) 615-4677. Medicare contractors may contact Alberta Smythe at (646) 458-6694 or their designated Regional Office (RO) Medicare Secondary Payer (MSP) Coordinator to report a concern or issue. In addition, you may E-mail questions/concerns to the COBC via Internet address at COB@ghimedicare.com.

2 Attachments

CMS-Pub. 60AB

The *effective date* for this PM is October 15, 2001.

The *implementation date* for this PM is October 15, 2001.

These instructions should be implemented within your current operating budget.

This PM may be discarded after June 15, 2002.

If you have any questions, refer to contacts as outlined above.

Note: GHI will implement this CR on October 15, 2001 as outlined in CR 1821, AB-01-114. This CR should be installed on that date or as soon as possible. Non-installation by data centers by this date for Medicare contractor use as outlined in AB-01-114 will cause transactions to abend.

Electronic Correspondence Referral System

(ECRS)

User Guide

Version 3.0.1

September 2001

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.).

Table of Contents

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...
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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 to fill out various online forms and electronically transmit assistance 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. 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. The action codes and corresponding fields are listed in the chart below.

If you enter this action code in the ACTION(S) field…	The system updates information in this field at CWF:
AI	INFMT NAME, PHONE, STREET, CITY, ST, ZIP (attorney information), when MSP TYPE = D, E, or L and INFMT REL = A
DX	DIAG (diagnosis codes, enter up to five)
ED	EFF DT (effective date). COB deletes the MSP auxiliary occurrence first, then adds a new MSP auxiliary occurrence with the new effective date.
EI	EMPLR NAME, STREET, CITY, ST, ZIP, EIN, and EMPLOYEE NO (employer information)
II	INSURER NAME, STREET, CITY, ST, ZIP, GROUP NO, POLICY NO, INSURED NAME, INS REL (insurer information)
IT	INS TYPE (insurance type)
MT	MSP TYPE. COB deletes the MSP auxiliary occurrence first, then adds a new MSP auxiliary occurrence with the new MSP type.
PH	PHP DATE
PR	PAT REL (patient relationship)
TD	TERM DT (termination date)

You are required to enter at least one action code, but you have the ability to enter a maximum of four 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.

The chart below lists action codes that are not associated with any specific fields.

Action Code	Explanation
DO	Delete occurrence
EA	Develop for employer address
ES	Employer size below minimum
LR	Add duplicate liability record
MX	SSN/HICN mismatch
RR	Right of recovery request
VP	Vow of poverty

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

                            VERSION 3.0

        **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 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	1. Type your contractor number (unique five-digit number assigned by CMS) in the CONTRACTOR NUMBER field. 2. Type your access code (five-character authorization code assigned by the COB contractor) in the ACCESS CODE field. 3. Type the name of the contractor representative in the REPRESENTATIVE field. 4. Type the contractor representative's telephone number in the PHONE field.
CMS user	1. Type your CMS ID number in the CMS NUMBER field. 2. Type your access code in the ACCESS CODE field.

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: __   SEARCH DATE FROM: _____ THROUGH: _____
                 HICN: _____         DCN: _____


          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




                        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 NUMBER: _____           ACCESS CODE: _____

    CONTRACTOR NUMBER: _____        ACCESS CODE: _____

    REPRESENTATIVE: _____

    PHONE: ____ - ____ - _____


            _____
            |          COB CONTRACTOR BULLETIN BOARD    |
            |_____|
            |              THE COB CONTRACTOR           |
            |_____|
            |                  WELCOMES                 |
            |_____|
            |                 YOU TO ECRS               |
            |_____|
            |_____|
            |_____|
            |_____|


                        PF12=EXIT
```

<table>
<tr><td colspan="2" align="center">COB ECRS Login Screen</td></tr>
<tr><td align="center">Field Name</td><td align="center">Description</td></tr>
<tr><td>CMS NUMBER</td><td>CMS identification number. Required field for CMS users.</td></tr>
<tr><td>ACCESS CODE</td><td>Three-position alphabetic authorization code for CMS users. Required field for CMS users.</td></tr>
<tr><td>CONTRACTOR NUMBER</td><td>Unique five-digit identification number assigned to each Medicare contractor by CMS. Required field for contractors.</td></tr>
<tr><td>ACCESS CODE</td><td>Five-character authorization code assigned by COB contractor. Required field for contractors.</td></tr>
<tr><td>REPRESENTATIVE</td><td>Contact person at contractor site

Note: 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.</td></tr>
<tr><td>PHONE</td><td>Phone number of contractor representative

Note: 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.</td></tr>
<tr><td>COB CONTRACTOR BULLETIN BOARD</td><td>Bulletins created in COB system</td></tr>
</table>

Transportation

COB ECRS Login Screen	
PF Key	**Function**
12	Exit ECRS

COB ECRS Main Menu Screen Description

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

CONTRACTOR NUMBER: _____

USER ID: _____   STATUS: __   SEARCH DATE FROM: _____  THROUGH: _____
                     HICN: _____         DCN: _____


           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



                            F3=RETURN F12=EXIT
```

COB ECRS Main Menu Screen	
Field Name	**Description**
CONTRACTOR NUMBER	**Medicare Contractors:** Contractor number entered on login screen *(protected field)* **CMS Users:** Type a CMS contractor number to view CWF assistance requests and inquiries for a specific contractor. Required field when accessing the MSP Developing Contractor Notification screen (07) and MSP Changed Record Notification screen (08).
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 and/or SEARCH DATE FROM and THROUGH dates to further refine a search.
STATUS	Status of record. Use this field with options 02 and 05 to find specific ECRS transactions. You can combine this field with USER ID and/or SEARCH DATE FROM and THROUGH dates to further refine a search.

COB ECRS Main Menu Screen	
Field Name	**Description**
SEARCH DATE FROM	Starting date of date range. Lists transactions last updated on or after this date for CWF assistance requests and MSP inquiries. Lists transactions originating on or after this date for the 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 a date range. Lists transactions last updated on or before this date for CWF assistance requests and MSP inquiries. Lists transactions originating on or after this date for the 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.
HICN	Health Insurance Claim Number. Searches for specific ECRS transactions. Use in conjunction with SEARCH DATE FROM and THROUGH dates to further refine a search.
DCN	Document Control Number assigned by Medicare contractor. Use this field with options 02 and 05 to find specific ECRS transactions. You can combine this field with SEARCH DATE FROM and THROUGH dates to further refine a search.
SELECTION	Selection field. Options are: 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 **Note:** You can perform searches for options 02 and 05 using criteria in any of the following combinations: • User ID • User ID, Status • User ID, Search Date From • User ID, Search Date Through • User ID, Search Date From, Search Date Through • User ID, Status, Search Date From • User ID, Status, Search Date Through • User ID, Status, Search Date From, Search Date Through • Status • Status, Search Date From • Status, Search Date Through • Status, Search Date From, Search Date Through • Search Date From • Search Date Through • Search Date From, Search Date Through • HICN • HICN, Search Date From • HICN, Search Date Through • HICN, Search Date From, Search Date Through

COB ECRS Main Menu Screen	
Field Name	**Description**
SELECTION (continued)	You can perform searches for options 06, 07, and 08 using criteria in any of the following combinations: • DCN • DCN, Search Date From • DCN, Search Date Through • DCN, Search Date From, Search Date Through • Search Date From • Search Date Through • Search Date From, Search Date Through • HICN • HICN, Search Date From • HICN, Search Date Through • HICN, Search Date From, Search Date Through **CMS Users:** In addition to all of the criteria listed above, you can also perform searches using Contractor Number and Contractor Number added to any other valid combination.

Transportation

COB ECRS Main Menu Screen	
PF Key	**Function**
03	Return to login screen
12	Exit ECRS

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 reference can help you use the system as you learn it. You can also use this reference 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...
Viewing the List of CWF Assistance Request Transactions	2-3
Adding, Viewing, and Updating CWF Assistance Request Transactions	2-6
Deleting a CWF Assistance Request Transaction	2-17
Viewing the List of MSP Inquiry Transactions	2-19
Adding, Viewing, and Updating MSP Inquiry Transactions	2-22
Deleting an MSP Inquiry Transaction	2-32
Requesting Document Copies	2-34
Viewing Lead Contractor Assignments	2-37
Viewing Developing Contractors for a Case	2-40
Viewing Notifications for Cases with Developing Contractors	2-42
Viewing Notifications of Changed MSP Records	2-44

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.

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.

```
                    ECRS CWF ASSISTANCE REQUEST LIST
  USER ID: _____     STATUS: __   LAST UPDATED FROM: _____   THROUGH: _____

  CNTR NBR: _____    HICN: _____        DCN: _____

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

  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
```

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

    *   User ID
    *   User ID, Status
    *   User ID, Last Updated From
    *   User ID, Last Updated Through
    *   User ID, Last Updated From, Last Updated Through
    *   User ID, Status, Last Updated From
    *   User ID, Status, Last Updated Through
    *   User ID, Status, Last Updated From, Last Updated Through
    *   Status
    *   Status, Last Updated From
    *   Status, Last Updated Through
    *   Status, Last Updated From, Last Updated Through
    *   Last Updated From
    *   Last Updated Through
    *   Last Updated From, Last Updated Through
    *   HICN
    *   HICN, Last Updated From
    *   HICN, Last Updated Through
    *   HICN, Last Updated From, Last Updated Through

- DCN
- DCN, Last Updated From
- DCN, Last Updated Through
- DCN, Last Updated From, Last Updated Through

CMS Users: In addition to all of the criteria listed above, you can also perform searches using Contractor Number and Contractor Number added to any other valid combination.

The dates in the LAST UPDATED FROM and THROUGH fields default to the dates entered in the SEARCH 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.

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

ECRS CWF Assistance Request List Screen	
Field Name	**Description**
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 entered as search criteria, if applicable. This field is updateable; enter a different Status to perform additional searches. To view all in-process CWF assistance request transactions, type **IP** in the STATUS field and press [Enter].
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.
CNTR NBR	**Medicare Contractors:** Contractor number entered on login screen *(protected field)* **CMS Users:** Type a CMS contractor number to view CWF assistance request transactions for a specific contractor.
HICN	Health Insurance Claim Number entered as search criteria, if applicable. This field is updateable; enter a different HICN to perform additional searches.

ECRS CWF Assistance Request List Screen	
Field Name	**Description**
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 **S** in this field and press [Enter] to transport to the ECRS CWF Assistance Request Detail screen. Type **D** 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 *(protected field)*
CNTR	Contractor number *(protected field)*
DCN	Document Control Number assigned to CWF assistance request transaction by Medicare contractor *(protected field)*
ST	Status of CWF assistance request transaction *(protected field)*. For a list of valid status values, see page 2-9.
RS	Reason of CWF assistance request transaction *(protected field)*. For a list of valid reason values, see page 2-11.
ORGIN DT	Originating date in MM-DD-CCYY format *(protected field)*
LST UPDATE	Date CWF assistance request transaction was last changed in MMDDCCYY format *(protected field)*
USER ID	User ID of operator who entered CWF assistance request transaction *(protected field)*

Transportation

ECRS CWF Assistance Request List Screen	
PF Key	**Function**
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 **D** 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 2-22).**

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)
- 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)
- Requesting that COB develop for an employer address (EA)
- Making documentation requests for generation of right of recovery letters (RR)

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

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

If you are a…	Follow these steps:
Medicare contractor	From the COB ECRS main menu screen, type **01** in the SELECTION field and press [Enter].
CMS user	1. From the COB ECRS main menu screen, type **02** in the SELECTION field and press [Enter]. The system displays the ECRS CWF Assistance Request List screen. 2. Type **S** in the SEL field next to the transaction for which you want to view detailed information and press [Enter].

The system displays the first page of the ECRS CWF Assistance Request Detail screen, as shown in the example on the next page.

```
                    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   XXXXXXXXXXXXXX
  ACTION(S): __ __ __ __   DCN: _____    REASON  XX   XXXXXXXXXXXXXX
                                                   SOURCE: _____ XXXXXXXXXXXXXX
  BENE HICN: _____   SSN: ___-___-____         DOB: _____   SEX: _
      NAME: _____ _ _____ PAT REL: _ XXXXXXXXXXXX
   MSP TYPE: _ XXXXXXXXXXXXXXX     EFF DT: _____ TERM DT: _____
                                 AUX REC: ____       ACCR DT: _____
  ORIG CNTR: _____
  BENE STRT: _____ _____
       CITY: _____ ST: __ ZIP: _____-____     PHONE: ___-___-____
    SUBSCBR: _____ _ _____

  INFMT NAME: _____ _ _____    PHONE: ___-___-____
     STREET: _____ _____
       CITY: _____ ST: __ ZIP: _____-____    INFMT REL: __ XXXXXXXXXX

  EMPLR NAME: _____ EIN: _____
     STREET: _____
       CITY: _____ ST: __ ZIP: _____-____    EMPLOYEE NO: _____


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

2. **Note:** Only Medicare contractors have the ability to enter data on this screen. CMS users only have the ability to view information on this screen.

   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
   - SOURCE
   - BENE HICN
   - NAME
   - PAT REL
   - MSP TYPE
   - EFF DT
   - AUX REC
   - ORIG CNTR

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

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
MX	SSN (Social Security Number)
TD	TERM DT (termination date)
AI	INFMT NAME, STREET, CITY, ST, ZIP, INFMT REL (attorney information)
EI	EMPLR NAME, STREET, CITY, ST, ZIP, EIN, and EMPLOYEE NO (employer information) **Note:** Type data in *all* fields to update employer information at CWF.

4. 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 XXXXXXXXXXXXXXX X XXXXXXXXXXXXXXXXXXXXXXXX
     HICN XXXXXXXXXXX        DCN XXXXXXXXXXXXXXX

  INSURER NAME: _____        INS TYPE: _ XXXXXXXXXXXXXXX
       STREET: _____ _____
         CITY: _____ ST: __ ZIP: _____-____
      GROUP NO: _____            POLICY NO: _____
  INSURED NAME: _____ _ _____     INS REL: __  XXXXXXXXXXXXXXX
  PHP DATE: _____
      REMARKS: __ __ __        DIAG: _____ _____ _____ _____ _____

    CLAIMS PENDING: _

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


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

5. Type data in the INS TYPE field, the only required field on the ECRS CWF Assistance Request Detail, Page 2 of 2 screen.

6. 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	INSURER NAME
	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.
	Note: Type data in *all* fields to update insurer information at CWF. Leave *all* fields blank to delete insurer information at CWF.
PH	PHP DATE (Pre-paid Health Plan date)
DX	DIAG (diagnosis codes) Enter at least one, but up to five.

7. 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."

8. 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   XXXXXXXXXXXXX
ACTION(S): __ __ __ __  DCN: _____        REASON  XX   XXXXXXXXXXXXX
                                                     SOURCE: _____ XXXXXXXXXXXXX
BENE HICN: _____    SSN: ___-___-____        DOB: _____  SEX: _
      NAME: _____ _ _____ PAT REL: _ XXXXXXXXXXXX
 MSP TYPE: _ XXXXXXXXXXXXXXX     EFF DT: _____ TERM DT: _____
                            AUX REC: ____         ACCR DT: _____
ORIG CNTR: _____
BENE STRT: _____  _____
      CITY: _____ ST: __ ZIP: _____-____     PHONE: ___-___-____
  SUBSCBR: _____ _ _____

INFMT NAME: _____ _ _____ PHONE: ___-___-____
     STREET: _____
       CITY: _____ ST: __ ZIP: _____-____    INFMT REL: __ XXXXXXXXXX

EMPLR NAME: _____ EIN: _____
     STREET: _____
       CITY: _____ ST: __ ZIP: _____-____    EMPLOYEE NO: _____


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

ECRS CWF Assistance Request Detail Screen, Page 1 of 2	
Field Name	**Description**
CNTR NBR.	Contractor number entered on login screen *(protected field)*
PHONE	Phone number of contractor representative
USER ID	User ID of operator who entered CWF assistance request transaction *(protected field)*
ORIG DT	Originating date in MM-DD-CCYY format *(protected field)*
CNTR REP.	Name of contractor representative to contact for further information or clarification regarding CWF assistance request
STATUS	Two-character code explaining where CWF assistance request transaction is in the COB system process *(protected field)*. Description of status code displays next to value. Valid values are: 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

| ECRS CWF Assistance Request Detail Screen, Page 1 of 2 ||
Field Name	**Description**
ACTION(S)	Two-character code defining action to take on CWF Auxiliary record *(required field).* Valid values are: AI Change attorney information DO Mark occurrence for deletion DX Change diagnosis codes EA COB must develop for 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 PH Add PHP date PR Change patient relationship RR Generate right of recovery lead contractor letter TD Change termination date VP Beneficiary has taken a vow of poverty Enter up to four action codes unless CWF assistance request is to delete occurrence (DO), request a right of recovery lead contractor letter (RR), or note a vow of poverty (VP). You cannot combine these three action codes with any other action codes.
DCN	Document Control Number assigned by contractor to correspondence and/or paperwork associated with transaction *(required field)*

ECRS CWF Assistance Request Detail Screen, Page 1 of 2	
Field Name	**Description**
REASON	Two-character code explaining why the CWF assistance request is in a particular status *(protected field)*. Description of reason code displays next to value. Valid values are: 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 10 Not processing 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
SOURCE	Four-character code identifying source of CWF assistance request information *(required field)*. Description of source code displays next to value. Valid values are: BX10 Information in Box 10 of claim CHEK Unsolicited check DVLP Information received in response to development initiated by Medicare contractor LTTR Letter PHON Phone call SCLM Claim submitted to Medicare contractor for secondary payment
BENE HICN	Health Insurance Claim Number of beneficiary *(required field)*. 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 *required fields*.

ECRS CWF Assistance Request Detail Screen, Page 1 of 2	
Field Name	**Description**
PAT REL	Patient relationship between policy holder and beneficiary *(required field)*. Description of code displays next to value. Valid values are: 1 Beneficiary is policy holder 2 Spouse 3 Child 4 Other
MSP TYPE	One-character code identifying type of MSP coverage *(required field)*. 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 *(required field)*
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 **9** eight times in this field if you have conflicting dates for the termination date.
AUX REC	Record number of MSP auxiliary occurrence in CWF *(required field)*
ACCR DT	Accretion date of MSP coverage in MMDDCCYY format
ORIG CNTR	Contractor number of contractor that created original MSP occurrence at CWF *(required field)*
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
SUBSCBR	Name of person (in first name/middle initial/last name format) under whose coverage beneficiary is receiving Medicare benefits
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 *required fields* when SOURCE is LTTR.
PHONE	Informant's telephone number
STREET	First and second lines of informant's street address. First address line is a *required field* when SOURCE is LTTR.
CITY	Informant's city. *Required field* when SOURCE is LTTR.
ST	Informant's state. *Required field* when SOURCE is LTTR.

ECRS CWF Assistance Request Detail Screen, Page 1 of 2	
Field Name	**Description**
ZIP	Informant's ZIP code. *Required field* when SOURCE is LTTR.
INFMT REL	One-character code indicating relationship of informant to beneficiary. *Required field* when SOURCE is 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
CITY	Employer's city
ST	Employer's state
ZIP	Employer's ZIP code
EMPLOYEE NO	Employee number of policy holder

Transportation

ECRS CWF Assistance Request Detail Screen, Page 1 of 2	
PF Key	**Function**
02	Return to ECRS main menu
03	Return to previous level
08	Page forward to second page of 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 XXXXXXXXXXXXXX X XXXXXXXXXXXXXXXXXXXXXXXX
    HICN XXXXXXXXXXX         DCN XXXXXXXXXXXXXXX

INSURER NAME: _____         INS TYPE: _ XXXXXXXXXXXXXXX
      STREET: _____ _____
        CITY: _____ ST: __ ZIP: _____-____
    GROUP NO: _____           POLICY NO: _____
INSURED NAME: _____ _ _____    INS REL: __  XXXXXXXXXXXXXXX
PHP DATE: _____
     REMARKS: __ __ __        DIAG: _____ _____ _____ _____ _____

   CLAIMS PENDING: _

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

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

ECRS CWF Assistance Request Detail Screen, Page 2 of 2	
Field Name	**Description**
CNTR NBR.	Five-digit number identifying the Medicare contractor *(protected field)*
BENE	Name of beneficiary in first name/middle initial/last name format *(protected field)*
HICN	Health Insurance Claim Number for beneficiary *(protected field)*
DCN	Document Control Number assigned by contractor to correspondence and/or paperwork associated with this transaction *(protected field)*
INSURER NAME	Name of insurance carrier for MSP coverage *(required field* for II action code)
INS TYPE	One-character code for type of insurance. Valid values are: J Hospital Only K Medical Only A Other Types
STREET	First and second lines of insurer's street address
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
INSURED NAME	Name of individual covered by this insurance in first name/middle initial/last name format

ECRS CWF Assistance Request Detail Screen, Page 2 of 2	
Field Name	**Description**
INS REL	One-character code indicating relationship between person covered by insurance and beneficiary. Description of code displays next to value. Valid values are: B Beneficiary C Child E Employer F Father I Insurer M Mother N Non-relative O Other relative P Provider S Spouse U Unknown
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.
CLAIMS PENDING	One-character field indicating whether claims were pending while waiting for this assistance request to be posted to CWF. Valid values are: N No Y Yes
COMMENTS	
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. *Protected field* when COB contractor adds a comment.
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. *Protected field* when Medicare contractor adds a comment.

Transportation

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

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.

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.

```
                       ECRS CWF ASSISTANCE REQUEST LIST
  USER ID: _____   STATUS: __   LAST UPDATED FROM: _____  THROUGH: _____

  CNTR NBR: _____    HICN: _____       DCN: _____

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

  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
```

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

    *   User ID
    *   User ID, Status
    *   User ID, Last Updated From
    *   User ID, Last Updated Through
    *   User ID, Last Updated From, Last Updated Through
    *   User ID, Status, Last Updated From
    *   User ID, Status, Last Updated Through
    *   User ID, Status, Last Updated From, Last Updated Through
    *   Status
    *   Status, Last Updated From
    *   Status, Last Updated Through
    *   Status, Last Updated From, Last Updated Through
    *   Last Updated From
    *   Last Updated Through
    *   Last Updated From, Last Updated Through
    *   HICN
    *   HICN, Last Updated From
    *   HICN, Last Updated Through
    *   HICN, Last Updated From, Last Updated Through

- DCN
- DCN, Last Updated From
- DCN, Last Updated Through
- DCN, Last Updated From, Last Updated Through

CMS Users: In addition to all of the criteria listed above, you can also perform searches using Contractor Number and Contractor Number added to any other valid combination.

The dates in the LAST UPDATED FROM and THROUGH fields default to the dates entered in the SEARCH 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.

3. Press [PF7] to scroll backward or [PF8] to scroll forward through the list to find the CWF assistance request transaction you want to delete.

4. 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.

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.

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.

1. 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:__  LAST UPDATED FROM:_____  THROUGH:_____
  CNTR NBR: _____   HICN: _____      DCN: _____

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

  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
```

2. From this screen, you can change or delete the search criteria to initiate a new search. You can perform searches using criteria in any of the following combinations:

    *   User ID
    *   User ID, Status
    *   User ID, Last Updated From
    *   User ID, Last Updated Through
    *   User ID, Last Updated From, Last Updated Through
    *   User ID, Status, Last Updated From
    *   User ID, Status, Last Updated Through
    *   User ID, Status, Last Updated From, Last Updated Through
    *   Status
    *   Status, Last Updated From
    *   Status, Last Updated Through
    *   Status, Last Updated From, Last Updated Through
    *   Last Updated From
    *   Last Updated Through
    *   Last Updated From, Last Updated Through
    *   HICN
    *   HICN, Last Updated From
    *   HICN, Last Updated Through
    *   HICN, Last Updated From, Last Updated Through

- DCN
- DCN, Last Updated From
- DCN, Last Updated Through
- DCN, Last Updated From, Last Updated Through

CMS Users: In addition to all of the criteria listed above, you can also perform searches using Contractor Number, as well as Contractor Number added to any other valid combination.

The dates in the LAST UPDATED FROM and THROUGH fields default to the dates entered in the SEARCH 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.

3. Press [PF7] to scroll backward or [PF8] to scroll forward through the list of MSP inquiry transactions.

4. 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.

5. 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

ECRS MSP Inquiry List Screen	
Field Name	**Description**
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 entered as search criteria, if applicable. This field is updateable; enter a different Status to perform additional searches. To view all in-process MSP inquiry transactions, type **IP** in the STATUS field and press [Enter].
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.
CNTR NBR	**Medicare Contractors:** Contractor number entered on login screen *(protected field)* **CMS Users:** Type a CMS contractor number to view MSP inquiry transactions for a specific contractor.
HICN	Health Insurance Claim Number entered as search criteria, if applicable. This field is updateable; enter a different HICN to perform additional searches.

ECRS MSP Inquiry List Screen	
Field Name	**Description**
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 **S** in this field and press [Enter] to transport to the ECRS MSP Inquiry Detail screen. Type **D** 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 *(protected field)*
CNTR	Contractor number *(protected field)*
DCN	Document Control Number assigned to MSP inquiry transaction by Medicare contractor *(protected field)*
ST	Status of MSP inquiry transaction *(protected field)*. For a list of valid status values, see page 2-25.
RS	Reason of MSP inquiry transaction *(protected field)*. For a list of valid reason values, see page 2-26.
ORGIN DT	Originating date in MM-DD-CCYY format *(protected field)*
LST UPDATE	Date MSP inquiry transaction was last changed in MMDDCCYY format *(protected field)*
USER ID	User ID of operator who entered MSP inquiry transaction *(protected field)*

Transportation

ECRS MSP Inquiry List Screen	
PF Key	**Function**
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 **D** 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)
- Responses to development initiated by the contractor prior to contract turnover to the COB contractor (DVLP)

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

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

If you are a…	Follow these steps:
Medicare contractor	From the COB ECRS main menu screen, type **04** in the SELECTION field and press [Enter].
CMS user	1. From the COB ECRS main menu screen, type **05** in the SELECTION field and press [Enter]. The system displays the ECRS MSP Inquiry List screen. 2. Type **S** in the SEL field next to the transaction for which you want to view detailed information 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 XXXXXXX ORIG DT: 99-99-9999
  CNTR REP.: _____      STATUS  XX   XXXXXXXXXXXXXX
                        DCN: _____      REASON  XX   XXXXXXXXXXXXXX
                                                   SOURCE: ____  XXXXXXXXXXXXXX
   BENE HICN: _____    SSN: ___ - __ - ____      DOB: _____   SEX: _
        NAME: _____ _ _____ PAT REL: _ XXXXXXXXXXX
   MSP TYPE: _ XXXXXXXXXXXXXXX    EFF DT: _____   TERM DT: _____
   SEND TO CWF? (Y/N) _

  BENE STRT: _____ _____
        CITY: _____ ST: __ ZIP: _____ - ____   PHONE: ___ - ___ - ____
     SUBSCBR: _____ _ _____

  INFMT NAME: _____ _ _____   PHONE: ___ - ___ - ____
        ADDR: _____ _____
        CITY: _____ ST: __ ZIP: _____ - ____   INFMT REL: __ XXXXXXXXXX

  EMPLR NAME: _____   EIN: _____
     STREET: _____
        CITY: _____ ST: __ ZIP: _____ - ____   EMPLOYEE NO: _____


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

2. **Note:**   Only Medicare contractors have the ability to enter data on this screen. CMS users only have the ability to view information on this screen.

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
BX10	DCN, SOURCE, BENE HICN, NAME **or** DCN, SOURCE, SSN, NAME, BENE STRT, CITY, ST, ZIP
CHEK	DCN, SOURCE, BENE HICN, NAME **or** DCN, SOURCE, SSN, NAME, BENE STRT, CITY, ST, ZIP
DVLP	DCN, SOURCE, BENE HICN, NAME, MSP TYPE, EFF DT, PAT REL **or** DCN, SOURCE, SSN, NAME, BENE STRT, CITY, ST, ZIP, MSP TYPE, EFF DT, PAT 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

SOURCE Code	Required Fields
PHON	DCN, SOURCE, BENE HICN, NAME, MSP TYPE, INFMT NAME, ADDR, CITY, ST, ZIP, INFMT REL **or** 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 **or** DCN, SOURCE, SSN, NAME, BENE STRT, CITY, ST, ZIP

3. 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 XXXXXXXXXXXXXX X XXXXXXXXXXXXXXXXXXXXXXXX
   HICN XXXXXXXXXXX         DCN XXXXXXXXXXXXX
 INSURER NAME: _____       INS TYPE: _ XXXXXXXXXXXXXXXX
       STREET: _____ _____
         CITY: _____ ST: __ ZIP: _____ - ____
     GROUP NO: _____               POLICY NO: _____
 INSURED NAME: _____ _ _____   INS REL: __   XXXXXXXXXXXXXXX

                           DIAG: _____ _____ _____ _____ _____
 ILLNESS/INJURY DT: _____   DESC: _____
 BENE REP NAME: _____ STRT: _____
          CITY: _____ ST: __ ZIP: _____ - ____ REP TYPE: _ XXXXXXXXXXXXX

 DIALYSIS TRAIN DT: _____   BLACK LUNG BENEFITS: _ EFF DT: _____
    CLAIMS PENDING: _
     COMMENTS: CNTR: _____
                    _____
                    _____
               COB: _____
                    _____
                    _____
                    _____

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

4. Type data in the appropriate fields.

5. 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."

6. 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

```
                              ECRS MSP INQUIRY DETAIL                    PAGE 1 OF 2
CNTR NBR.  99999  PHONE:   ___ - ___ - ____ USER ID XXXXXXXX ORIG DT: 99-99-9999
CNTR REP.: _____         STATUS XX   XXXXXXXXXXXXXX
                      DCN: _____           REASON XX   XXXXXXXXXXXXXX
                                                      SOURCE: _____ XXXXXXXXXXXXXX
 BENE HICN: _____     SSN: ___ - __ - ____        DOB: _____  SEX: _
       NAME: _____ _ _____ PAT REL: _ XXXXXXXXXXXX
  MSP TYPE: _ XXXXXXXXXXXXXXX    EFF DT: _____   TERM DT: _____
 SEND TO CWF? (Y/N) _

BENE STRT: _____ _____
       CITY: _____ ST: __ ZIP: _____ - ____   PHONE: ___ - ___ - ____
     SUBSCBR: _____ _ _____

INFMT NAME: _____ _ _____   PHONE: ___ - ___ - ____
       ADDR: _____
       CITY: _____ ST: __ ZIP: _____ - ____   INFMT REL: __ XXXXXXXXXX

EMPLR NAME: _____   EIN: _____
     STREET: _____
       CITY: _____ ST: __ ZIP: _____ - ____   EMPLOYEE NO: _____


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

ECRS MSP Inquiry Detail Screen, Page 1 of 2	
Field Name	**Description**
CNTR NBR.	Contractor number entered on login screen *(protected field)*
PHONE	Phone number of contractor representative
USER ID	User ID of operator who entered MSP inquiry transaction *(protected field)*
ORIG DT	Originating date in MM-DD-CCYY format *(protected field)*
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 *(protected field)*. 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
DCN	Document Control Number assigned by contractor to correspondence and/or paperwork associated with transaction *(required field)*

ECRS MSP Inquiry Detail Screen, Page 1 of 2	
Field Name	**Description**
REASON	Two-character code explaining why the MSP inquiry is in a particular status *(protected field)*. Description of reason code displays next to value. Valid values are: 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 10 Not processing 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
SOURCE	Four-character code identifying source of MSP inquiry information *(required field)*. Description of source code displays next to value. Valid values are: BX10 Information in Box 10 of claim CHEK Unsolicited check DVLP Information received in response to development initiated by Medicare contractor LTTR Letter PHON Phone call SCLM Claim submitted to Medicare contractor for secondary payment
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	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 *required fields*.

ECRS MSP Inquiry Detail Screen, Page 1 of 2	
Field Name	**Description**
PAT REL	Patient relationship between policy holder and beneficiary. Description of code displays next to value. Valid values are: 1 Beneficiary is policy holder 2 Spouse 3 Child 4 Other
MSP TYPE	One-character code identifying type of MSP coverage. 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 Health) G Disabled H Black Lung I Veterans L Liability
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
SEND TO CWF? (Y/N)	Indicates whether to send MSP inquiry to CWF. Valid values are: Y Send to CWF (default unless INFMT REL = D, in which case default is N and this is a *protected field*) N Do not send to CWF
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
SUBSCBR	Name of person (in first name/middle initial/last name format) under whose coverage beneficiary is receiving Medicare benefits
INFMT NAME	Name of person (in first name/middle initial/last name format) informing contractor of change in MSP coverage
PHONE	Informant's telephone number
STREET	First and second lines of informant's street address
CITY	Informant's city
ST	Informant's state
ZIP	Informant's ZIP code

ECRS MSP Inquiry Detail Screen, Page 1 of 2	
Field Name	**Description**
INFMT REL	One-character code indicating relationship of informant to beneficiary. 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
CITY	Employer's city
ST	Employer's state
ZIP	Employer's ZIP code
EMPLOYEE NO	Employee number of policy holder

Transportation

ECRS MSP Inquiry Detail Screen, Page 1 of 2	
PF Key	**Function**
02	Return to ECRS main menu
03	Return to previous level
08	Page forward to second page of screen
12	Exit ECRS

ECRS MSP Inquiry Detail, Page 2 of 2 Screen Description

```
                          ECRS MSP INQUIRY DETAIL                  PAGE 2 OF 2
CNTR NBR. 99999             BENE XXXXXXXXXXXXXX X XXXXXXXXXXXXXXXXXXXXXXX
    HICN XXXXXXXXXXX         DCN XXXXXXXXXXXXXX
INSURER NAME: _____         INS TYPE: _ XXXXXXXXXXXXXXXX
       STREET: _____
         CITY: _____ ST: __ ZIP: _____ - ____
     GROUP NO: _____             POLICY NO: _____
INSURED NAME: _____ _ _____     INS REL: __   XXXXXXXXXXXXXXXX

                             DIAG: _____ _____ _____ _____ _____
ILLNESS/INJURY DT: _____  DESC: _____
BENE REP NAME: _____ STRT: _____
         CITY: _____ ST: __ ZIP: _____ - ____ REP TYPE: _ XXXXXXXXXXXXX

DIALYSIS TRAIN DT: _____  BLACK LUNG BENEFITS: _ EFF DT: _____
    CLAIMS PENDING: _
    COMMENTS: CNTR: _____
                   _____
                   _____
              COB: _____
                   _____
                   _____

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

ECRS MSP Inquiry Detail Screen, Page 2 of 2	
Field Name	**Description**
CNTR NBR.	Five-digit number identifying the Medicare contractor *(protected field)*
BENE	Name of beneficiary in first name/middle initial/last name format *(protected field)*
HICN	Health Insurance Claim Number for beneficiary *(protected field)*
DCN	Document Control Number assigned by contractor to correspondence and/or paperwork associated with this transaction *(protected field)*
INSURER NAME	Name of insurance carrier for MSP coverage
INS TYPE	One-character code for type of insurance. Valid values are: J Hospital Only K Medical Only A Other Types
STREET	First and second lines of insurer's street address
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
INSURED NAME	Name of individual covered by this insurance in first name/middle initial/last name format

ECRS MSP Inquiry Detail Screen, Page 2 of 2	
Field Name	**Description**
INS REL	One-character code indicating relationship between person covered by insurance and beneficiary. Description of code displays next to value. Valid values are: B Beneficiary C Child E Employer F Father I Insurer M Mother N Non-relative O Other relative P Provider S Spouse U Unknown
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 **Y**.

ECRS MSP Inquiry Detail Screen, Page 2 of 2	
Field Name	**Description**
CLAIMS PENDING	One-character field indicating whether claims were pending while waiting for this MSP inquiry to be posted to CWF. Valid values are: N No Y Yes
COMMENTS	
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. *Protected field* when COB contractor adds a comment.
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. *Protected field* when Medicare contractor adds a comment.

Transportation

ECRS MSP Inquiry Detail Screen, Page 2 of 2	
PF Key	**Function**
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
12	Exit ECRS

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.

1. 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:__  LAST UPDATED FROM:_____  THROUGH:_____
     CNTR NBR: _____   HICN: _____      DCN: _____

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

     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
```

2. From this screen, you can change or delete the search criteria to initiate a new search. You can perform searches using criteria in any of the following combinations:

   - User ID
   - User ID, Status
   - User ID, Last Updated From
   - User ID, Last Updated Through
   - User ID, Last Updated From, Last Updated Through
   - User ID, Status, Last Updated From
   - User ID, Status, Last Updated Through
   - User ID, Status, Last Updated From, Last Updated Through
   - Status
   - Status, Last Updated From
   - Status, Last Updated Through
   - Status, Last Updated From, Last Updated Through
   - Last Updated From
   - Last Updated Through
   - Last Updated From, Last Updated Through
   - HICN
   - HICN, Last Updated From
   - HICN, Last Updated Through
   - HICN, Last Updated From, Last Updated Through

- DCN
- DCN, Last Updated From
- DCN, Last Updated Through
- DCN, Last Updated From, Last Updated Through

CMS Users: In addition to all of the criteria listed above, you can also perform searches using Contractor Number, as well as Contractor Number added to any other valid combination.

The dates in the LAST UPDATED FROM and THROUGH fields default to the dates entered in the SEARCH 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.

3. Press [PF7] to scroll backward or [PF8] to scroll forward through the list of MSP inquiry transactions.

4. 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.

5. 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 2-20.

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: _____  XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX

      BENE HICN: _____      SSN: ___ - __ - ____        SOURCE:  _____
           NAME: _____ _ _____
         STREET: _____ _____
           CITY: _____ ST: __ ZIP: _____ ____

       MSP TYPE: _  XXXXXXXXXXXXXXXX     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

ECRS Document Copies Request Screen	
Field Name	**Description**
CNTR NO.	Five-digit number identifying the Medicare contractor *(protected field)*
PHONE	Phone number of contractor representative *(required field)*
DCN	Document Control Number assigned by contractor to correspondence and/or paperwork associated with this request *(required field)*
CNTR REP.	Name of contractor representative to contact for further information and/or clarification regarding this request *(required field)*
USER ID	User ID of operator who entered document copy request *(protected field)*
SEND TO	Name and address of recipient or other instructions regarding where document copies should be sent *(required field)*
DOCUMENT REQUESTED	Four-character code indicating documents requested *(required field)*. 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 *(required field)*. Type HICN without dashes, spaces, or other special characters.
SSN	Social Security Number for beneficiary
SOURCE	Source for related MSP occurrence. *Required field* 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 *(required field)*
STREET	First and second lines of beneficiary's street address
CITY	Beneficiary's city
ST	Beneficiary's state
ZIP	Beneficiary's ZIP code

<table>
<tr><td colspan="2" align="center">***ECRS Document Copies Request Screen***</td></tr>
<tr><td align="center">**Field Name**</td><td align="center">**Description**</td></tr>
<tr>
<td>MSP TYPE</td>
<td>One-character code identifying type of MSP coverage *(required field)*. 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</td>
</tr>
<tr><td>EFF DT</td><td>Effective date of MSP coverage in MMDDCCYY format *(required field)*</td></tr>
<tr><td>TERM DT</td><td>Termination date of MSP coverage in MMDDCCYY format</td></tr>
<tr><td>EMPLR NAME</td><td>Name of employer providing group health insurance under which beneficiary is covered</td></tr>
<tr><td>EIN</td><td>Employer Identification Number. *Required field* if document requested is DMQ (Data Match questionnaire).</td></tr>
</table>

Transportation

<table>
<tr><td colspan="2" align="center">***ECRS Document Copies Request Screen***</td></tr>
<tr><td align="center">**PF Key**</td><td align="center">**Function**</td></tr>
<tr><td>02</td><td>Return to ECRS main menu</td></tr>
<tr><td>03</td><td>Return to previous level</td></tr>
<tr><td>05</td><td>Send document copy request</td></tr>
<tr><td>12</td><td>Exit ECRS</td></tr>
</table>

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 view the case assignment list on this screen. Contractors cannot view the case assignment list of other lead contractors 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 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                    TYPE    EFF DATE    ORIGN DATE
   _    XXXXXXXXXXXX  XXXXXXXXXXXXXXXXXXXXXXX X    X    99-99-9999   99-99-9999
   _    XXXXXXXXXXXX  XXXXXXXXXXXXXXXXXXXXXXX X    X    99-99-9999   99-99-9999
   _    XXXXXXXXXXXX  XXXXXXXXXXXXXXXXXXXXXXX X    X    99-99-9999   99-99-9999
   _    XXXXXXXXXXXX  XXXXXXXXXXXXXXXXXXXXXXX X    X    99-99-9999   99-99-9999
   _    XXXXXXXXXXXX  XXXXXXXXXXXXXXXXXXXXXXX X    X    99-99-9999   99-99-9999
   _    XXXXXXXXXXXX  XXXXXXXXXXXXXXXXXXXXXXX X    X    99-99-9999   99-99-9999
   _    XXXXXXXXXXXX  XXXXXXXXXXXXXXXXXXXXXXX X    X    99-99-9999   99-99-9999
   _    XXXXXXXXXXXX  XXXXXXXXXXXXXXXXXXXXXXX X    X    99-99-9999   99-99-9999
   _    XXXXXXXXXXXX  XXXXXXXXXXXXXXXXXXXXXXX X    X    99-99-9999   99-99-9999
   _    XXXXXXXXXXXX  XXXXXXXXXXXXXXXXXXXXXXX X    X    99-99-9999   99-99-9999
   _    XXXXXXXXXXXX  XXXXXXXXXXXXXXXXXXXXXXX X    X    99-99-9999   99-99-9999
   _    XXXXXXXXXXXX  XXXXXXXXXXXXXXXXXXXXXXX X    X    99-99-9999   99-99-9999
   _    XXXXXXXXXXXX  XXXXXXXXXXXXXXXXXXXXXXX X    X    99-99-9999   99-99-9999
   _    XXXXXXXXXXXX  XXXXXXXXXXXXXXXXXXXXXXX X    X    99-99-9999   99-99-9999
   _    XXXXXXXXXXXX  XXXXXXXXXXXXXXXXXXXXXXX X    X    99-99-9999   99-99-9999
   _    XXXXXXXXXXXX  XXXXXXXXXXXXXXXXXXXXXXX X    X    99-99-9999   99-99-9999
   _    XXXXXXXXXXXX  XXXXXXXXXXXXXXXXXXXXXXX X    X    99-99-9999   99-99-9999
   _    XXXXXXXXXXXX  XXXXXXXXXXXXXXXXXXXXXXX X    X    99-99-9999   99-99-9999

              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. The dates in the ORIGIN DATE FROM and THROUGH fields default to the dates entered in the SEARCH 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

ECRS MSP Lead Contractor Assignment Screen	
Field Name	**Description**
SEL	Selection field. Type **S** 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	**Medicare Contractors:** Contractor number entered on login screen *(protected field)* **CMS Users:** Type a CMS contractor number to search for assignment records for a specific contractor.
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 *(protected field)*
BENEFICIARY	First 15 characters of last name and first initial of beneficiary for case assigned to contractor *(protected field)*
TYPE	MSP type for case assigned to contractor *(protected field)*. For a list of valid type values, see page 2-27.
EFF DATE	Effective date of MSP coverage case assigned to contractor *(protected field)*
ORIGN DATE	Originating date in MMDDCCYY format *(protected field)*

Transportation

ECRS MSP Lead Contractor Assignment Screen	
PF Key	**Function**
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 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 DEVLEOPING CONTRACTORS FOR LEAD

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

       NUMBER  NAME                                       PHONE
       XXXXX   XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX   999-999-9999
       XXXXX   XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX   999-999-9999
       XXXXX   XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX   999-999-9999
       XXXXX   XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX   999-999-9999
       XXXXX   XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX   999-999-9999
       XXXXX   XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX   999-999-9999
       XXXXX   XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX   999-999-9999
       XXXXX   XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX   999-999-9999
       XXXXX   XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX   999-999-9999
       XXXXX   XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX   999-999-9999
       XXXXX   XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX   999-999-9999
       XXXXX   XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX   999-999-9999
       XXXXX   XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX   999-999-9999
       XXXXX   XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX   999-999-9999
       XXXXX   XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX   999-999-9999
       XXXXX   XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX   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

ECRS Developing Contractors for Lead Screen	
Field Name	**Description**
HICN	Health Insurance Claim Number for MSP inquiry *(protected field)*
BENEFICIARY	First 15 characters of last name and first initial of beneficiary for case assigned to contractor *(protected field)*
TYPE	MSP type for case assigned to contractor *(protected field)*. For a list of valid values, see page 2-27.
EFF DATE	Effective date of MSP coverage case assigned to contractor *(protected field)*
ORIGN DATE	Originating date in MMDDCCYY format *(protected field)*
(DEVELOPING CONTRACTORS)	
NUMBER	Contractor number of other Medicare contractors that may be interested or involved in the case assigned *(protected field)*
NAME	Name of other Medicare contractors that may be interested or involved in the case assigned *(protected field)*
PHONE	Phone number for other Medicare contractors that may be interested or involved in the case assigned *(protected field)*

Transportation

ECRS Developing Contractors for Lead Screen	
PF Key	**Function**
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 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 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:_____   ORIGIN DATE FROM: _____   THROUGH: _____


  HICN         BENEFICIARY             TYPE   EFF DATE   ORIGN DATE   LEAD
  XXXXXXXXXXXX XXXXXXXXXXXXXXXXXXXXXXXX X    X  99-99-9999  99-99-9999  99999
  XXXXXXXXXXXX XXXXXXXXXXXXXXXXXXXXXXXX X    X  99-99-9999  99-99-9999  99999
  XXXXXXXXXXXX XXXXXXXXXXXXXXXXXXXXXXXX X    X  99-99-9999  99-99-9999  99999
  XXXXXXXXXXXX XXXXXXXXXXXXXXXXXXXXXXXX X    X  99-99-9999  99-99-9999  99999
  XXXXXXXXXXXX XXXXXXXXXXXXXXXXXXXXXXXX X    X  99-99-9999  99-99-9999  99999
  XXXXXXXXXXXX XXXXXXXXXXXXXXXXXXXXXXXX X    X  99-99-9999  99-99-9999  99999
  XXXXXXXXXXXX XXXXXXXXXXXXXXXXXXXXXXXX X    X  99-99-9999  99-99-9999  99999
  XXXXXXXXXXXX XXXXXXXXXXXXXXXXXXXXXXXX X    X  99-99-9999  99-99-9999  99999
  XXXXXXXXXXXX XXXXXXXXXXXXXXXXXXXXXXXX X    X  99-99-9999  99-99-9999  99999
  XXXXXXXXXXXX XXXXXXXXXXXXXXXXXXXXXXXX X    X  99-99-9999  99-99-9999  99999
  XXXXXXXXXXXX XXXXXXXXXXXXXXXXXXXXXXXX X    X  99-99-9999  99-99-9999  99999
  XXXXXXXXXXXX XXXXXXXXXXXXXXXXXXXXXXXX X    X  99-99-9999  99-99-9999  99999
  XXXXXXXXXXXX XXXXXXXXXXXXXXXXXXXXXXXX X    X  99-99-9999  99-99-9999  99999
  XXXXXXXXXXXX XXXXXXXXXXXXXXXXXXXXXXXX X    X  99-99-9999  99-99-9999  99999
  XXXXXXXXXXXX XXXXXXXXXXXXXXXXXXXXXXXX X    X  99-99-9999  99-99-9999  99999
  XXXXXXXXXXXX XXXXXXXXXXXXXXXXXXXXXXXX X    X  99-99-9999  99-99-9999  99999
  XXXXXXXXXXXX XXXXXXXXXXXXXXXXXXXXXXXX X    X  99-99-9999  99-99-9999  99999


                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 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

<table>
<tr><td colspan="2" align="center">ECRS MSP Developing Contractor Notification Screen</td></tr>
<tr><th align="center">Field Name</th><th align="center">Description</th></tr>
<tr><td>HICN</td><td>Health Insurance Claim Number entered as search criteria, if applicable. This field is updateable; enter a different HICN to perform additional searches.</td></tr>
<tr><td>CNTR</td><td>Medicare Contractors:
Contractor number entered on login screen (protected field)

CMS Users:
Type a CMS contractor number to search for developing records for a specific contractor.</td></tr>
<tr><td>ORIGIN DATE FROM</td><td>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.</td></tr>
<tr><td>THROUGH</td><td>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.</td></tr>
<tr><td>HICN</td><td>Health Insurance Claim Number for case (protected field)</td></tr>
<tr><td>BENEFICIARY</td><td>First 15 characters of last name and first initial of beneficiary for case (protected field)</td></tr>
<tr><td>TYPE</td><td>MSP type for case (protected field). For a list of valid type values, see page 2-27.</td></tr>
<tr><td>EFF DATE</td><td>Effective date of MSP coverage case (protected field)</td></tr>
<tr><td>ORIGN DATE</td><td>Originating date in MMDDCCYY format (protected field)</td></tr>
<tr><td>LEAD</td><td>Contractor number of Medicare contractor assigned as lead for case (protected field)</td></tr>
</table>

Transportation

<table>
<tr><td colspan="2" align="center">ECRS MSP Developing Contractor Notification Screen</td></tr>
<tr><th>PF Key</th><th align="center">Function</th></tr>
<tr><td>02</td><td>Return to ECRS main menu, current search criteria is not retained</td></tr>
<tr><td>03</td><td>Return to ECRS main menu, current search criteria is retained</td></tr>
<tr><td>07</td><td>Scroll backward</td></tr>
<tr><td>08</td><td>Scroll forward</td></tr>
<tr><td>12</td><td>Exit ECRS</td></tr>
</table>

Viewing Notifications of Changed MSP Records

Use the MSP Changed Record Notification screen to view MSP occurrences in which the developing contractor 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 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: _____   LAST UPDATED FROM: _____   THROUGH: _____

      HICN          BENEFICIARY                   TYPE   EFF DATE   LAST UPDATE   ACTION
      XXXXXXXXXXXX  XXXXXXXXXXXXXXXXXXXXXXXX X      X    99-99-9999  99-99-9999   XXXXXXXXXXX
      XXXXXXXXXXXX  XXXXXXXXXXXXXXXXXXXXXXXX X      X    99-99-9999  99-99-9999   XXXXXXXXXXX
      XXXXXXXXXXXX  XXXXXXXXXXXXXXXXXXXXXXXX X      X    99-99-9999  99-99-9999   XXXXXXXXXXX
      XXXXXXXXXXXX  XXXXXXXXXXXXXXXXXXXXXXXX X      X    99-99-9999  99-99-9999   XXXXXXXXXXX
      XXXXXXXXXXXX  XXXXXXXXXXXXXXXXXXXXXXXX X      X    99-99-9999  99-99-9999   XXXXXXXXXXX
      XXXXXXXXXXXX  XXXXXXXXXXXXXXXXXXXXXXXX X      X    99-99-9999  99-99-9999   XXXXXXXXXXX
      XXXXXXXXXXXX  XXXXXXXXXXXXXXXXXXXXXXXX X      X    99-99-9999  99-99-9999   XXXXXXXXXXX
      XXXXXXXXXXXX  XXXXXXXXXXXXXXXXXXXXXXXX X      X    99-99-9999  99-99-9999   XXXXXXXXXXX
      XXXXXXXXXXXX  XXXXXXXXXXXXXXXXXXXXXXXX X      X    99-99-9999  99-99-9999   XXXXXXXXXXX
      XXXXXXXXXXXX  XXXXXXXXXXXXXXXXXXXXXXXX X      X    99-99-9999  99-99-9999   XXXXXXXXXXX
      XXXXXXXXXXXX  XXXXXXXXXXXXXXXXXXXXXXXX X      X    99-99-9999  99-99-9999   XXXXXXXXXXX
      XXXXXXXXXXXX  XXXXXXXXXXXXXXXXXXXXXXXX X      X    99-99-9999  99-99-9999   XXXXXXXXXXX
      XXXXXXXXXXXX  XXXXXXXXXXXXXXXXXXXXXXXX X      X    99-99-9999  99-99-9999   XXXXXXXXXXX
      XXXXXXXXXXXX  XXXXXXXXXXXXXXXXXXXXXXXX X      X    99-99-9999  99-99-9999   XXXXXXXXXXX
      XXXXXXXXXXXX  XXXXXXXXXXXXXXXXXXXXXXXX X      X    99-99-9999  99-99-9999   XXXXXXXXXXX
      XXXXXXXXXXXX  XXXXXXXXXXXXXXXXXXXXXXXX X      X    99-99-9999  99-99-9999   XXXXXXXXXXX
      XXXXXXXXXXXX  XXXXXXXXXXXXXXXXXXXXXXXX X      X    99-99-9999  99-99-9999   XXXXXXXXXXX


                     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 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

<table>
<tr><td colspan="2" align="center">***ECRS MSP Changed Record Notification Screen***</td></tr>
<tr><td align="center">**Field Name**</td><td align="center">**Description**</td></tr>
<tr><td>HICN</td><td>Health Insurance Claim Number entered as search criteria, if applicable. This field is updateable; enter a different HICN to perform additional searches.</td></tr>
<tr><td>CNTR</td><td>**Medicare Contractors:**
Contractor number entered on login screen *(protected field)*

CMS Users:
Type a CMS contractor number to search for changed records for a specific contractor.</td></tr>
<tr><td>LAST UPDATED FROM</td><td>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.</td></tr>
<tr><td>THROUGH</td><td>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.</td></tr>
<tr><td>HICN</td><td>Health Insurance Claim Number for case *(protected field)*</td></tr>
<tr><td>BENEFICIARY</td><td>First 15 characters of last name and first initial of beneficiary for case *(protected field)*</td></tr>
<tr><td>TYPE</td><td>MSP type for case *(protected field)*. For a list of valid type values, see page 2-27.</td></tr>
<tr><td>EFF DATE</td><td>Effective date of MSP coverage case *(protected field)*</td></tr>
<tr><td>LAST UPDATE</td><td>Date notification record was last changed in MMDDCCYY format *(protected field)*</td></tr>
<tr><td>ACTION</td><td>Action performed by COB Contractor on this occurrence *(protected field)*. Valid values are:

ADDED   New occurrence added to CWF
DELETED   Occurrence deleted from CWF
UPDATED Occurrence updated on CWF</td></tr>
</table>

Transportation

ECRS MSP Changed Record Notification Screen	
PF Key	**Function**
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

A

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.
CANNOT SPECIFY S AND D SIMULTANEOUSLY	Correct the SEL field to either **S**elect a transaction or **D**elete a transaction.
CANNOT USE MULTIPLE SEARCH SELECTIONS	Correct search criteria.
CLAIMS PENDING MUST BE Y OR N	Enter **Y** (yes) or **N** (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.
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.

Message	Action
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.
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 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 **S** and press [Enter] for only one record at a time.
NO PROCESSING REQUESTED	N/A
NO RECORDS FOUND MEETING SEARCH CRITERIA	Modify search criteria and initiate new search.
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 **S** 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

Message	Action
SSN REQUIRED FOR MX (SSN/HICN Mismatch) ACTION	Enter valid SSN.
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 **S** 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.
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.
XXXXXXXXX (Field Name) REQUIRED FOR SOURCE OF XXXX (Source Type)	Enter valid value in field specified or change source type.

Notes:

B

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	• View a list of all CWF assistance requests submitted by the contractor • Check the progress of a CWF assistance request transaction
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	• View a list of all MSP inquiries submitted by the contractor • Check the progress of an MSP inquiry
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)

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 the contractor forgets to answer "Yes" in the CLAIMS PENDING field for an ECRS CWF assistance request or MSP inquiry, should they refer the case again?

No, do not refer the case a second time.

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.

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.

Notes:

C

Appendix C: Glossary

*C*Action Codes	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.
Assistance Request Transaction	Request to add, update, or delete an existing CWF MSP auxiliary occurrence
Bene	Medicare beneficiary
CMS	Centers for Medicare & Medicaid Services, federal agency that administers the Medicare program
COB	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.
Contractor Number	Unique five-digit number assigned to Medicare contractors by CMS. Transactions are entered and viewed in ECRS by contractor number.
CWF	Common Working File, the Medicare Part A/Part B benefit coordination system that uses localized databases maintained by a host contractor
Data Match	Process by which information on employers and employees is analyzed by CMS for use in contacting employers concerning possible periods of MSP
DCN	Document Control Number
Developing Contractor	Contractor that may have an interest or involvement in an MSP case that was assigned to another contractor for coordination of Medicare activities
ECRS	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.
EIN	Employer Identification Number
HICN	Health Insurance Claim Number
IEQ	Initial Enrollment Questionnaire, used to gather Medicare Secondary Payer information for newly-eligible beneficiaries
Lead Contractor	CMS-appointed Medicare intermediary that coordinates Medicare recovery activities for MSP cases with interested contractors, attorneys, insurance companies, and other liable entities

Medicare Contractor   Organization contracting with CMS to process claims, pay for or provide medical services, or enhance the agency's capability to administer the Medicare program

MSP   Medicare Secondary Payer, statutory requirement that private or other government insurance plans or programs providing health care coverage of Medicare beneficiaries pay before Medicare

MSP Inquiry Transaction   Inquiry regarding possible MSP coverage

SSN   Social Security Number

Electronic Correspondence Referral System (ECRS)

Quick Reference Card

September 2001

GHI-DI-502-3.0.1

Main Menu Codes

Selection Options	
Value	**Transports to:**
01	ECRS CWF Assistance Request Detail screen
02	ECRS CWF Assistance Request List screen
03	ECRS Document Copies Request screen
04	ECRS MSP Inquiry Detail screen
05	ECRS MSP Inquiry List screen
06	ECRS MSP Lead Contractor Assignment screen
07	ECRS MSP Developing Contractor Notification screen
08	ECRS MSP Changed Record Notification screen

CWF Assistance Request Codes

Enter CWF assistance requests for existing MSP records.

Required Fields on ECRS CWF Assistance Request Detail Screens	
Field	**Description**
ACTION(S)	Action codes
DCN	Document Control Number
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

Action Codes	
Value	**Description**
AI	Change attorney information
DO	Mark occurrence for deletion
DX	Change diagnosis codes
EA	COB must develop for 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

Action Codes (continued)	
Value	**Description**
MT	Change MSP type
MX	SSN/HICN mismatch
PH	Add PHP date
PR	Change patient relationship
RR	Generate right of recovery lead contractor record
TD	Change termination date
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)
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.

Required Fields for Source Codes

Value	Required Fields
BX10	DCN, SOURCE, BENE HICN, NAME **or** DCN, SOURCE, SSN, NAME, BENE STRT, CITY, ST, ZIP
CHEK	DCN, SOURCE, BENE HICN, NAME **or** DCN, SOURCE, SSN, NAME, BENE STRT, CITY, ST, ZIP
DVLP	DCN, SOURCE, BENE HICN, NAME, MSP TYPE, EFF DT, PAT REL **or** DCN, SOURCE, SSN, NAME, BENE STRT, CITY, ST, ZIP, MSP TYPE, EFF DT, PAT 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
PHON	DCN, SOURCE, BENE HICN, NAME, MSP TYPE, INFMT NAME, ADDR, CITY, ST, ZIP, INFMT REL **or** 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 **or** DCN, SOURCE, SSN, NAME, BENE STRT, CITY, ST, ZIP

General Codes

The following codes apply to both CWF assistance requests and MSP inquiries.

MSP Type Codes

Value	Description
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

Reason Codes

Value	Description
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
10	Not processing
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

Status Codes

Value	Description
CM	Completed
DE	Delete (do not process) ECRS request
HD	Hold, used for Box 10 entries (inquiries only)
IP	In process, being edited by COB
NW	New, not yet read by COB

Source Codes

Value	Description
BX10	Information in Box 10 of claim
CHEK	Unsolicited check
DVLP	Information received in response to development initiated by Medicare contractor
LTTR	Letter
PHON	Phone call
SCLM	Claim submitted to Medicare contractor for secondary payment

Patient Relationship Codes

Value	Description
1	Beneficiary is policy holder
2	Spouse
3	Child
4	Other

Informant Relationship Codes

Value	Description
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

Insurance Type Codes

Value	Description
J	Hospital only
K	Medical only
A	Other types

Relationship to Insured Codes

Value	Description
B	Beneficiary
C	Child
E	Employer
F	Father
I	Insurer
M	Mother
N	Non-relative
O	Other relative
P	Provider
S	Spouse
U	Unknown