CGDP Onboarding Training

Onboarding is the training process that describes requirements all Part D Plan Sponsors are encouraged to complete in order to fulfill program requirements of the Coverage Gap Discount Program (CGDP).

In this training you will learn about –

- Program Overview
- Welcome Letter and Forms to be Completed
  - Sponsor Forms
  - Health Plan Management System (HPMS) Access
- CGDP Portal Access
  - Accessing the Portal
  - Initiating Payments
  - Reports
  - Disputes
- Getting Help
Program Overview

- As of January 1, 2011, the Affordable Care Act became effective and in accordance with this legislation, the Medicare Coverage Gap Discount Program was established.
- The CGDP requires that Sponsors provide Part D beneficiaries with a discount for applicable drugs at the point of sale. Drug Manufacturers are required to reimburse the Sponsor for this discount.
- Section 1860D-14(A) (d) requires that CMS contract with a Third Party Administrator (TPA) to:
  - Receive and transmit information between CMS, pharmaceutical Manufacturers, Part D Sponsors and other entities as appropriate.
  - Receive, distribute, or facilitate the distribution of funds of pharmaceutical Manufacturers and Part D Sponsors to the appropriate entities.
  - Provide adequate and timely information to Part D Sponsors.
- The TPA is the single point of contact between the pharmaceutical Manufacturers (including their third party vendors) and the Part D Sponsors participating in the CGDP.
**Program Overview**

**Coverage Gap Discount Flow**

- Part D Sponsors (Sponsors) advance Gap Discounts to beneficiaries at point of sale.
- Sponsors submit prescription drug event (PDE) records to CMS recording the Gap Discount amount.
- CMS aggregates qualifying PDE data and sends the resulting invoices to the TPA.
- TPA sends quarterly invoice and reports data to pharmaceutical Manufacturers (Manufacturers) and Sponsors simultaneously via the CGDP Portal.
- Manufacturers and Sponsors use the CGDP Portal to pay the invoice and invoice adjustment amounts in full within 38 days after invoice distribution.
- TPA collects payment statuses and program compliance data from the CGDP Portal and submits statistics to CMS.

1/25/2017

PALMETTO GBA

The information in this presentation is confidential and considered proprietary to Palmetto GBA.
Program Overview
Invoice Distribution Schedule

On a quarterly basis the TPA distributes invoice and data files to Sponsors based on qualifying PDE data submitted to CMS.

The table displayed below provides the reporting period quarter end and report distribution dates for 2017.

<table>
<thead>
<tr>
<th>Quarter End Date</th>
<th>Report Distribution Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>March 31</td>
<td>April 30</td>
</tr>
<tr>
<td>June 30</td>
<td>August 31</td>
</tr>
<tr>
<td>September 30</td>
<td>October 31</td>
</tr>
<tr>
<td>December 31</td>
<td>January 31</td>
</tr>
</tbody>
</table>

A full program calendar can be found at the TPA website [http://tpadministrator.com](http://tpadministrator.com).

The **CGDP Calendar** link appears on the left side of the TPA website page.

Select the **Medicare Part D Coverage Gap Discount Program Calendar** link to view the full calendar.
ONBOARDING FORMS

Coverage Gap Discount Program (CGDP)
Onboarding Form Requirements

Part D Sponsors (and their Third Party Vendors) that participate in the CGDP supply onboarding information to allow the TPA to act as the single point of contact to facilitate the distribution and receipt of funds between the participating entities.

For Sponsors, the following forms are required:

- Welcome Letter
- CMS HPMS Access via Enterprise User Authentication (EUA) Form
- Electronic Funds Transfer (EFT) Online Form (ACH Deposit)
- ProfitStars Application (Automated Clearinghouse (ACH) Payment)
- CGDP Online Registration form
- CGDP Reconciliation (Payment Reconciliation Summary (PRS)) form
Sponsor Onboarding Form Requirements

Sponsors will receive a three page Welcome Letter from the TPA Support Center with instructions for completing and submitting these forms:

- CGDP Online Registration form
- CMS EUA Workflow Request Form (HPMS Access)
- Payment Information Form (ACH Deposit)
- ProfitStars application (ACH Payment)*
- CGDP Reconciliation (PRS) form

Access to the majority of these forms is available via the TPA website at http://tpadministrator.com.

* Provided in separate email to the Sponsor TPA Liaison or a TPA Liaison designated Sponsor point of contact (POC) for financial/payment related communications.
The first page of the Welcome Letter provides new Sponsors with instructions for gaining access to the CGDP Portal and a listing of online and paper forms requiring completion.

Third Party Administrator (TPA) Support Center for Medicare Part D Sponsors welcomes you to the Coverage Gap Discount Program (CGDP). We provide online access to process invoice payments, review disputes for invoiced amounts, and retrieve Invoice, Data, Tracking, and Manufacturer 1099 reports. To access information and reports for the CGDP, select the hyperlink to complete the CGDP Online Registration Form or go to www.tpadministrator.com, select Quarterly Invoices in the left-hand column then select the CGDP Online Registration Form.

The CGDP Online Registration is due by January 31, 2017, 11:59 pm ET.

It is a CMS requirement that the TPA Liaison contact in the Health Plan Management System (HPMS) is the same person listed as the Primary Contact on the CGDP Online Registration Form. Login credentials will only be provided to the TPA Liaison contact. Login credentials will not be provided if the Primary Contact differs from the TPA Liaison listed in HPMS. In addition, deadlines will not be excused or extended for failure to have the TPA Liaison contact information listed on the HPMS website. For information on how to update HPMS, please refer to the HPMS Point of Contact Information link listed in Table 2: Documents Checklist.
The second page of the Welcome Letter requires the completion of the Table 1: Third Party Vendor Reports. This table is completed if a third party vendor is authorized to receive Invoice, Data, and Tracking reports for the Sponsor.

Once completed, scan the second page and send it to the TPA Operations via email: tpaoperations@tpadministrator.com.
The last page of the Welcome Letter provides Sponsors with a checklist of documents and links referenced in the instructions on the letter’s prior pages.

This checklist is provided for Sponsors to track the documents and due dates of each required document and its corresponding link, if applicable.

<table>
<thead>
<tr>
<th>DOCUMENT</th>
<th>FORM DESCRIPTION</th>
<th>DUE DATE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Welcome Letter</td>
<td>Instruction</td>
<td></td>
</tr>
<tr>
<td>CGDP Online Registration Form</td>
<td>Initial registration form (Form to be mailed to TPA Operations)</td>
<td></td>
</tr>
<tr>
<td>Electronic Funds Transfer (EFT) Online Form Payment Information Form</td>
<td>Receive deposits from entities (Form submitted electronically)</td>
<td></td>
</tr>
<tr>
<td>Profit Stars Application (ACH Payments)</td>
<td>Make payments to entities</td>
<td></td>
</tr>
<tr>
<td>CGDP Portal Registration</td>
<td>Access to reports, initiating payments or reviewing disputes (Login credentials will be provided by TPA Operations)</td>
<td></td>
</tr>
<tr>
<td>Listserv Registration Listserv Profile</td>
<td>Ability to receive email announcements from TPA Operations</td>
<td></td>
</tr>
<tr>
<td>Third Party Registration Form (If applicable)</td>
<td>Complete if Third Party is managing payments and/or retrieving reports (Form to be emailed to TPA Operations)</td>
<td></td>
</tr>
<tr>
<td>CGDP Reconciliation (PRS) Form Payment Reconciliation Summary Form</td>
<td>Complete for receiving annual PRS reports (Form to be mailed to TPA Operations)</td>
<td></td>
</tr>
<tr>
<td>HPMS Point of Contact Information HPMS website</td>
<td>Website (Ensure this is the most current information)</td>
<td></td>
</tr>
</tbody>
</table>
The Welcome Letter provides instructions for accessing and completing multiple forms, some of which are available via the TPA website, while others are provided via email.

To access the online registration form for the CGDP, you can select the hyperlink in the electronic Welcome Letter to complete the CGDP Online Registration Form.

Or

You can visit www.tpadministrator.com and select Quarterly Invoices in the left-hand column then select the CGDP Online Registration Form link located in the center-section of the page.
The CGDP Online Registration Form contains two pages, the **Contact Information** page and the **Contracts** page.

The designated user will fill out both pages of the CGDP Online Registration form.
Once both pages of the CGDP Online Registration Form are complete, select the ‘Send data to TPA and create Account’ button to submit the completed form to the TPA.
A PDF file will be generated after the completion of the online forms.

An authorized Sponsor representative is responsible for signing the printed PDF document.

The original signed copy should be sent to the TPA via USPS or express mail addresses provided on the first page of the printout.

<table>
<thead>
<tr>
<th>Company Name:</th>
<th>CGDP Portal Insurance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address:</td>
<td>1234 CGDP Way</td>
</tr>
<tr>
<td>City, State Zip:</td>
<td>Anytown, MD 12345</td>
</tr>
<tr>
<td>Contact Person:</td>
<td>Ida Know</td>
</tr>
<tr>
<td>E-mail Address:</td>
<td><a href="mailto:Ida.Know@cgdpportalins.com">Ida.Know@cgdpportalins.com</a></td>
</tr>
<tr>
<td>Phone Number:</td>
<td>(410) 555-1234</td>
</tr>
</tbody>
</table>

Listed below are the contract number(s) you authorize to receive the TPA Reports:

H0000

SIGNATURE & TITLE OF ORGANIZATION’S AUTHORIZED REPRESENTATIVE

Thaler Rentenmark  
Printed Name  
Thaler Rentenmark  
CFO  
12/12/2016  
Date

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Copyright 2016 Palmetto GBA, LLC. ALL RIGHTS RESERVED.
Sponsor associates listed in the Online Registration Form as the TPA Liaison must have access to HPMS to be granted access to the CGDP Portal.

In order to obtain HPMS access, the EUA Workflow Request form must be completed. An excerpt of the EUA Workflow Request Form is provided here:

To assist with completing the EUA Workflow Request Form, the TPA Operations can provide directions to new Sponsors.
Sponsor Login Credentials

It is a CMS requirement that the TPA Liaison contact in HPMS is the same person listed as the TPA Liaison entered in CGDP Online Registration Form.

**Note:**
Login credentials will *only* be provided to the TPA Liaison contact. Login credentials will not be provided if the TPA Liaison Contact listed in the Welcome Letter differs from the TPA Liaison contact listed in HPMS.

In addition, deadlines will not be excused or extended for failure to have the correct TPA Liaison contact information listed on the HPMS website.
After verification that the TPA Liaison in HPMS matches the TPA Liaison contact in the CGDP Online Registration Form, the TPA Liaison will receive two separate emails with CGDP Sponsor Portal access information; the first with the User ID, and the second with the initial password.

The CGDP Portal is used to facilitate the CGDP quarterly invoicing and direct payment processing.

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**To:** Ida.Know@cgdportalins.com  
**Sent:** Wednesday, December 14, 2016 11:03 AM  
**From:** TPA Operations  
**Subject:** CGDP User ID

Hello Ida,

To access the new portal, follow the steps below:

- [www.tpadministrator.com](http://www.tpadministrator.com)
- New Direct Payment Process Information
- CGDP Portal

Your User ID is **H0000** and your temporary password will follow on a separate email.

Thank you,  
TPA Operations  
1-877-534-2772 Option 1

---

**To:** Ida.Know@cgdportalins.com  
**Sent:** Wednesday, December 14, 2016 11:03 AM  
**From:** TPA Operations  
**Subject:** CGDP Password

The following is assigned to the user id for the Coverage Gap Discount Portal and must be entered as displayed below:

**password**

Thank you,  
TPA Operations  
1-877-534-2772 Option 1
Sponsors are required to complete an EFT form to provide a depository account to receive Manufacturer CGDP funds paid via the CGDP Portal.


Select the *EFT Information* link on the left-hand side of the webpage and once the *EFT Information* page appears, select the *Payee Bank Account Change Form (account for receiving payments)* link.
The EFT Online Form will be sent to the TPA Liaison listed in the Sponsor CGDP Online Registration Form. The TPA Liaison can designate a different POC user, if necessary, to fill out the EFT Online form’s five sections:

- Organization Information
- Mailing Address for 1099 Tax Form
- Financial Institution
- Form Completed By
- Authorized Signer Information

Once all sections are completed, the user completing the EFT Online form selects the ‘Initiate Request’ button at the bottom of the form.

The ‘Initiate Request’ button initiates the Adobe Sign eSignature process for the verification and validation of new EFT account activity required for CGDP participation.
Once the form is completed and initiated, the TPA receives the form for validation and verification.

This process utilizes Adobe Sign eSignature functionality to provide authorization and audit trail information for the form originator, the authorized signer, and TPA Operations.

Adobe Sign eSignature information is transmitted via email to the contact information provided in the *Form Completed By* and *Authorized Signer Information* sections of the EFT Online Form.

The **Document Submission Success** message, displayed below, lists the email address of the person listed in the *Authorized Signer Information* after the ‘Initiate Request’ button has been selected.

```
Document Submission Success
The document has been submitted successfully and will undergo validation before being sent to the specified authorized signer:
Thaler.Rentermark@cgdpportalins.com

Click here to submit another document.
```
After the TPA receives the electronic version of the EFT Online form, a ProfitStars invitation email will be forwarded to the authorized Sponsor TPA Liaison or designated POC.

To access ProfitStars to complete an account application form, select the “click here” link (highlighted in red) in the email.

This application will provide account information that will be utilized to make CGDP invoice payments via the CGDP Portal.
Sponsor ProfitStars Application

The link listed in the invitation email will open the ProfitStars site to allow the Sponsor TPA Liaison or designated POC to create an access account and complete the ProfitStars application.

Once each of the items under the **Forms** column on the ProfitStars website (highlighted in red) has been completed, an application number will be supplied and a system generated email will be sent.
After the application has been reviewed by ProfitStars, an Application Ready for Signature email will be sent to the authorized signer for the company.

Upon accessing ProfitStars and creating an access account, the authorized signer will select the Application for Payment Processing item listed under the Documents column on the right-hand side of the page (highlighted in red above), review the application for content, and either sign the application electronically or reject the application.
Sponsors are also required to complete a Payment Reconciliation Summary (PRS) report form.

PRS reports are generated and distributed on an annual basis. The CGDP Reconciliation reconciles the prospective CGDP payments with the actual reported gap discount amounts invoiced during the first six quarters of the benefit year.

The form is located on the TPA website, http://tpadministrator.com. Select the CGDP Reconciliation link on the left-hand side of the webpage and once the CGDP Reconciliation page appears, select the PRS form link.
Sponsor
CGDP Reconciliation (PRS) Form PDF

A PDF file will be displayed after selecting the PRS Form link.

A designated Sponsor representative is required to print the form, complete the required data, sign and mail the original, wet-signature form to TPA Operations using one of the two addresses provided on page two of the form.
If a Third Party vendor is designated by a Sponsor in the Sponsor Welcome Letter, the TPA Support Center will send a two page Welcome Letter to the third party vendor using the email supplied in the Sponsor Welcome Letter Table 1: Third Party Vendor Reports.

The TPA Support Center email will contain a two page Third Party Vendor Welcome Letter with instructions for completing and submitting information to the TPA via email.
Third Party Vendor Welcome Letter – Page One

The first page of the Welcome Letter provides a brief introduction to the CGDP for Third Party Vendors, how to submit the completed form back to TPA Operations, and instructions for the second page of the Welcome Letter requiring completion.
The second page of the Welcome Letter provides information about the Sponsor authorizing the third party organization access to CGDP information.

There are two additional tables are located on the second page. One of these tables should be completed by the third party vendor with the applicable information, based on the Third Party Vendor Status check box prefilled by the TPA Operations in the table below.

<table>
<thead>
<tr>
<th>Third Party Vendor Name</th>
<th>Submitter ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>Drug Manufacturer /Sponsor Name</td>
<td>Agree</td>
</tr>
<tr>
<td>□</td>
<td>□</td>
</tr>
<tr>
<td>Third Party Vendor Status</td>
<td>New:</td>
</tr>
<tr>
<td>□</td>
<td>□</td>
</tr>
</tbody>
</table>

The check box populated in the Third Party Vendor Status field designates information the vendor receiving the Welcome Letter will complete.

The two additional tables are:
- Table 1: New Third Party Vendors
- Table 2: Established Third Party Vendors
ACCESSING THE CGDP PORTAL

Coverage Gap Discount Program (CGDP)
The CGDP Portal is designed to assist Sponsors with processing Coverage Gap Discount Program payments. This system allows Sponsors to review invoice line items and initiate bank-to-bank ACH transfers for invoice line item payments, similar to the way an online banking customer pays a monthly bill.

The CGDP Portal will provide functionality for the following:

- Invoice review
- Invoice payment deferment*
- Automatic payment confirmation
- Invoice dispute disposition
- Invoice payment selection
- Batch Invoice payment selection
- Payment receipt review
- Reports retrieval

The CGDP Portal became the active system for processing CGDP payment requirements with the 2015 Q2 reporting period.

*Invoice payment deferment occurs under limited circumstances and is detailed in the Sponsor Portal Direct Payment Process (DPP) Users Guide.
CGDP program participants can access the CGDP Portal via the TPA website: [http://tpadministrator.com](http://tpadministrator.com).

Once on the site, select the *Direct Payment Process Information* link located on the left side of the page.

After the *Direct Payment Process Information* page opens, locate and select the *CGDP Portal* link.
The CGDP Portal contains two roles for Sponsors to gain access:

- Payment Initiator role
- Administrator role

The HPMS TPA Liaison contact is automatically assigned these two roles for Sponsors; however, the Payment Initiator role can be assigned to a separate associate, listed in HPMS as the Coverage Gap Discount Program (CGDP) Payment Initiator, who will have the responsibility of processing payment of invoice line items submitted each quarter.

Users assigned the Payment Initiator role will have access to all functionality in the Portal and be required to provide a four-digit numeric PIN pass code for processing payment initiation authorization. The four-digit PIN is created during security setup.

Users assigned the Administrator role will have access to all functionality, except payment initiation authorization.

Detailed instructions for security setup and payment functionality resides in the CGDP Sponsor Portal Direct Payment Process (DPP) Users Guide.
CGDP program participants can access the CGDP Portal Users Guides via the TPA website http://tpadministrator.com.

Once on the site, select the Direct Payment Process Information link located on the left side of the page.

For daily access, authorized users of the Portal will use the Login form to access the CGDP Portal.

- The User ID is the Parent Organization ID for Sponsors
- HPMS-assigned Sponsor TPA Liaison or Coverage Gap Discount Program (CGDP) Payment Initiator personnel are sent a temporary password for initial access and are responsible for changing and maintaining their permanent password every 30 days
- Sponsors associates are assigned one of two roles for access to the Portal, Payment Initiator and Administrator
- All invoice and report data (except the annual CGDP Reconciliation report (PRS) for Sponsors) is loaded to the Portal for access and review by Payment Initiator and Administrator role associates

Detailed instructions for accessing the CGDP Portal resides in the CGDP Sponsor Portal Direct Payment Process (DPP) Users Guide.
After entering the **User ID** and **Password** successfully, a random security question appears from the three security questions selected during initial security data setup. Enter the correct answer and select the **Validate** button.

CGDP Sponsor Portal Login – Successful Login

Once entered correctly, the Sponsor Portal Home tab becomes available.

Detailed instructions for accessing the CGDP Portal resides in the CGDP Sponsor Portal Direct Payment Process (DPP) Users Guide.
INITIATING PAYMENTS

Coverage Gap Discount Program (CGDP)
The CGDP Portal Payments tab allows a user to review and process payment information for quarterly invoice line items by Manufacturer P number for Sponsors.

- Payments can only be made via the CGDP Portal
- Payment amounts automatically populate from the quarterly invoice and are not subject to modification
- Payments must be paid no later than 38 days after the distribution of the invoice
- Sponsors can perform these payment functions in the CGDP Portal
  - Individual invoice payment functionality
  - Future Date invoice payment functionality
  - Initiate All invoice payments functionality
  - Payment Initiation Upload Batch functionality
  - Stop Payment functionality
  - Defer Payment functionality

Detailed instructions for payment functionality resides in the CGDP Sponsor Portal Direct Payment Process (DPP) Users Guide.
The Payments tab contains eight regions:

1) The **Tabbed region** displays the active tab
2) The **Invoice Reporting region** displays the current reporting period
3) The **Payments Due region** displays the date payments are due
4) The **Filter region – Payments** allows filtering of invoices by selected criteria
5) The **Payment Information region** provides numerical totals of all invoice line items and their qualifying status
6) The **Payment Initiation region** displays payment eligible invoices by P Number and Invoiced Amount and/or Previous Deferred Amount
7) The **Payment Initiation Upload region** provides a location to upload payment batch files
8) The **Pending Transactions region** displays invoice line items that are pending payment processing

Detailed instructions for processing Invoice Payments resides in the CGDP Sponsor Portal Direct Payment Process (DPP) Users Guide.
CGDP Portal –
Initiating CY Closeout Invoice Payments

The CGDP Portal Payments tab allows a user to review and process upheld dispute payment information for CY Closeout invoice line items by Manufacturer P number for Sponsors.

- Payments can only be made via the CGDP Portal
- Payment amounts automatically populate from the invoice and are not subject to modification
- Payments must be paid no later than 38 days after the distribution of the invoice
- These payment functions are available for CY Closeout processing in the CGDP Portal
  - Individual invoice payment functionality
  - Future Date invoice payment functionality
  - Initiate All invoice payments functionality
  - Payment Initiation Upload Batch functionality
  - Stop Payment functionality
  - Defer Payment functionality

Detailed instructions for CY Closeout payment functionality resides in the CGDP Sponsor Portal Direct Payment Process (DPP) Users Guide.
The Payments tab contains eight regions:

1) **The Tabbed region** displays the active tab
2) **The Reimbursement Report Year region** displays the calendar year CY Closeout invoices are distributed
3) **The Payments Due region** displays the date payments are due
4) **The Filter region – Payments** allows filtering of invoices by selected criteria
5) **The Payment Information region** provides numerical totals of all invoice line items and their qualifying status
6) **The Payment Initiation region** displays payment eligible invoices by P Number and Invoiced Amount and/or Previous Deferred Amount
7) **The Payment Initiation Upload region** provides a location to upload payment batch files
8) **The Pending Transactions region** displays invoice line items that are pending payment processing

Detailed instructions for processing Invoice Payments resides in the CGDP Sponsor Portal Direct Payment Process (DPP) Users Guide.
INVOICE REPORTS

Coverage Gap Discount Program (CGDP)
Onboarding Training – Invoice Reports

- Distributed quarterly to Sponsors via the CGDP Portal
- Provides gap discount summarized into invoices based on Contract Number

Detailed instructions for downloading Invoice reports reside in the CGDP Sponsor Portal Direct Payment Process (DPP) Users Guide found on the TPAadministrator.com website.
Sponsors are able to utilize the CGDP Portal to view summary reports of invoice line items available for processing.

The population of the Invoice radio button allows a user to select and view distributed invoice line item reports. The report provides abbreviated information of distributed quarterly or Calendar Year (CY) invoices and provides the ability to download the information for review.

Detailed instructions for accessing Invoice Reports resides in the CGDP Sponsor Portal Direct Payment Process (DPP) Users Guide.
DATA REPORTS

Coverage Gap Discount Program (CGDP)

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Onboarding Training – Data Reports

• Distributed quarterly to Sponsors
• Provides Sponsors the opportunity to review inputs to the invoice
• Incorporates changes in subsequent quarters due to adjustments or deletions of PDEs

Sponsor Data Report

Sponsors are able to utilize the CGDP Portal to review detail data reports for distributed quarterly or CY invoices line items.

The population of the **Data** radio button provides a user with reports containing summary information of the PDE’s combined to create the total invoice line item amount distributed to the Sponsor.

Detailed instructions for accessing Data Reports resides in the CGDP Sponsor Portal Direct Payment Process (DPP) Users Guide.
Onboarding Training – Invoice Tracking Report

- Distributed quarterly to Sponsors
  - Report that provides the history of each Gap Discount PDE saved in the CMS database and all activity associated with the invoice, such as adjustments performed in response for upheld Manufacturer disputes
- Tracking reports are provided for each benefit year

Detailed instructions for downloading Tracking reports reside in the CGDP Sponsor Portal Direct Payment Process (DPP) Users Guide found on the TPAAdministrator.com website.
Sponsor Invoice Tracking Report

Sponsors are able to utilize the CGDP Portal to view reports of invoice line item history.

The Invoice Tracking Report provides Sponsors with the history of each Gap Discount PDE saved in the CMS database and all activity associated with the invoice, such as adjustments performed in response for upheld Manufacturer disputes.

Detailed instructions for accessing Tracking Reports resides in the CGDP Sponsor Portal Direct Payment Process (DPP) Users Guide.
Onboarding Training – Batch Reports

• Generated when the Batch Upload Payment Process is utilized to process payment initiations

Sponsors are able to utilize batch reports to review the outcome of the Payment Initiation Upload batch processing of multiple invoice line items and provide uploaded batch file results for quarterly and CY Closeout invoice processing.

A user is able to view batch file status for successful processing, partially or totally rejected batch file uploads, and review errors associated with rejected records.

1099 INFORMATION REPORTS

Coverage Gap Discount Program (CGDP)
Onboarding Training – Manufacturer 1099 Reports for Sponsors

- Loaded to the Portal for access to 1099 non-bank account information, such as the Manufacturer P Number; Company Name; EIN/TIN; IRS Street Address, City, and State.

Detailed instructions for downloading 1099 reports reside in the CGDP Sponsor Portal Direct Payment Process (DPP) Users Guide found on the TPAadministrator.com website.
Sponsors are able to utilize the CGDP Portal to review the Manufacturer 1099 Information report which provides non-bank account information for Sponsors to utilize for tax reporting purposes.

Detailed instructions for accessing Invoice Reports resides in the CGDP Sponsor Portal Direct Payment Process (DPP) Users Guide.
The CGDP Portal provides Sponsors with the ability to review Manufacturer dispute filings and their subsequent determinations.

• The Disputes tab allows Sponsors the ability to review the Dispute Resolution Report

• Sponsors have 90 days from discovery (date the dispute resolution file is distributed to Sponsors via the CGDP Portal) to submit a corrected PDE’s to CMS
  • Manufacturers can generally expect an adjustment for an upheld dispute usually within two invoicing cycles after the release of the dispute resolution file

• Sponsors are obligated to fix the incorrect data that caused the upheld dispute and can adjust financial and/or non-financial fields to correct the upheld disputes
  • The Reported Gap Discount amount may or may not change due to an upheld dispute
The Sponsors Disputes tab contains four regions:

1) The Tabbed region displays the active tab
2) The Filter region - Disputes allows filtering of disputes by selected criteria
3) The Current Cutoff Calendar region provides pertinent reporting period dates
4) The Resolution File region displays Upheld and Denied dispute resolution files

Detailed instructions for reviewing dispute resolution files reside in the CGDP Sponsor Portal Direct Payment Process (DPP) Users Guide.
CONTACTING THE TPA
Contacting the TPA

- **TPA Website** – [http://tpadministrator.com](http://tpadministrator.com)
  - **Phone**
    - Help Line: **1 (877) 534-2772 Option 1**
    - Help Line Hours: **Monday through Friday  8:00 am until 7:00 pm EST**

- General email inquiries regarding the invoicing and payment process should be sent to
  - **tpaoperations@tpadministrator.com**

- **Webinar Training**
  - Suggestions for webinar topics should be sent to **webinar@tpadministrator.com**
  - Previous webinar slides are posted to the TPA website

- Questions regarding Disputes, EFT information and invoice corrections can be located on the TPA website
  - **[http://tpadministrator.com](http://tpadministrator.com)**
Resources

- Medicare Drug Benefit and C & D Data Group
  - Manufacturers Agreement, Changes of Ownership (CHOW), Terminations, Compliance/Administrative-related Issues, and Policy related questions
  - Email
    - CGDPandManufacturers@cms.hhs.gov

- Discount Program Manufacturer’s Page
  - Website

- Independent Review Entity (IRE) for Discount Program appeals
  - Website
    - https://cgdpappeals.provider-resources.com
• HPMS Website Updating CMS contact and labeler code changes
  • Website
    • https://hpms.cms.gov
  • CMS HPMS Password Resets (CMS Passwords must be reset every 60 days via CMS EUA system)
    • CMS EUA Password Reset: https://eua.cms.gov
    • CMS IT Service Desk phone: 1 (800) 562-1963 or 1 (410) 786-2580
    • CMS IT Service Desk email: CMS_IT_service_desk@cms.hhs.gov

• CMS HPMS Non-Password access assistance
  • Email:
    • CMSHPMS_access@cms.hhs.gov
Onboarding Training Questions

Questions?

Send an email to tpaoperations@tpadministrator.com with your questions.