

# Coverage Gap Discount Program



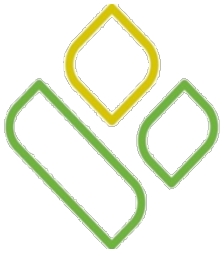
## *CGDP PORTAL DPP-MANUFACTURERS*



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*Reports – Invoice, Data and  
Sponsor 1099 Information  
Tab Functionality*



# CGDP Portal DPP-Manufacturers – Topics

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In this training session you will learn about the Coverage Gap Discount Program (CGDP) Portal Direct Payment Process (DPP)- Manufacturers **Reports** tab and the **Reports – Invoice, Data and Sponsor 1099 Information** functionality.

This training will introduce you to the following topics:

1. First look introduction of the **Reports** Tab
2. **Reports** tab regions
  - **Tabbed region – Reports**
  - **Reports Current Cutoff Calendar region**
  - **Reports Type Selection region**
  - **Reports Filter – Invoice region**
  - **Reports Filter Results – Invoice region**
3. Work Instruction for utilizing the **Reports – Invoice, Data and Sponsor 1099 Information** functionality

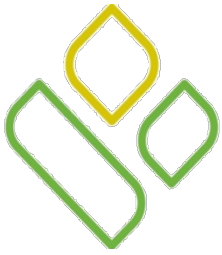
# *CGDP PORTAL DPP- MANUFACTURERS*



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*Introduction to the  
Reports – Invoice, Data and Sponsor  
1099 Information Tab*



# CGDP Portal DPP-Manufacturers Reports Tab

The **Reports** tab allows the user to review invoice related reporting data.

This training session will describe each of the five regions displayed on the **Reports** tab and provide direction on the functionality of each. Regions four and five are specific to the **Reports – Invoice** and **Data** functionality.

**Manufacturer Portal CGDP Reports**

① Home Payments Completed Receipts **Reports**

② **Current Cutoff Calendar**

③  Invoice  Data  Dispute  Batch  Sponsor 1099 Information

④ Corporate ID: XP1\_\_4 P Number: ANY

Corporate ID	P Number	Reporting Period	Date Loaded	Download	Last Download
XP1__4	P1__4	201404	01/31/2015	<input type="radio"/>	
	P1__8	201404	01/31/2015	<input type="radio"/>	
	P1__1	201404	01/31/2015	<input type="radio"/>	

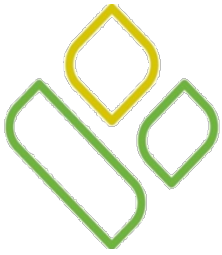
# *CGDP PORTAL DPP- MANUFACTURERS*



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*Reports – Invoice and Data  
Tab Regions*



# CGDP Portal DPP-Manufacturers Tabbed, Calendar and Report Type Regions

The first three regions of the **Reports** tab are:

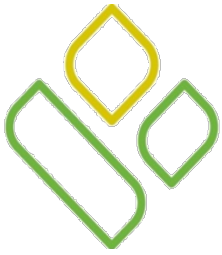
Current Cutoff Calendar	
Reporting Period	201404
Invoice Paid by	03/11/2015
Invoice Distribution	01/31/2015
Dispute Submission	04/02/2015
Dispute Distribution	06/01/2015

The **Tabbed region** allows the user to select different activities to perform while accessing the system. The **Tabbed region – Reports** provides the access to the **Reports** tab to review the different invoice related reporting data.

The **Reports Current Cutoff Calendar region** displays pertinent program dates for the applicable reporting period. The calendar updates each quarter to provide the active reporting period date information.

The **Reports Type Selection region** provides a user with four selections to display or download distributed files and reports. The following slide will describe the four types of report selections available.

In this example, the **Reports** tab is active, the **Reports Current Cutoff Calendar region** displays program dates for the 4<sup>th</sup> quarter of calendar year 2014 and the **Reports Type Selection region** radio button is populated for Invoice or Data reports.



# CGDP Portal DPP-Manufacturers Reports Type Selection Region

The **Reports Type Selection region** provides four types of report selections for Manufacturers to utilize.

③  Invoice  Data  Dispute  Batch  Sponsor 1099 Information

- Invoice reports: allows the user to select and view distributed invoice line item reports. The report provides abbreviated information for distributed invoice line item totals and provides the ability to download the collected information for review. The default selection for the **Report Type Selection region** is Invoice.

③  Invoice  Data  Dispute  Batch  Sponsor 1099 Information

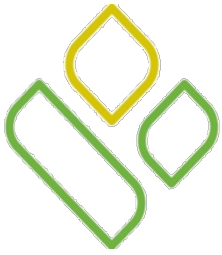
- Batch reports: provides a user with reports containing uploaded batch file results when utilizing the **Payment Initiation Upload** process. The user is able to view batch file status for successful upload, partial upload or failed batch file uploads and review errors associated with failed records.  
*Batch reports will be presented in a separate training session.*

③  Invoice  Data  Dispute  Batch  Sponsor 1099 Information

- Data reports: provides a user with reports containing detail information of Prescription Drug Event (PDE) submissions combined to create the total invoice line item amounts distributed to the Manufacturer.

③  Invoice  Data  Dispute  Batch  Sponsor 1099 Information

- Dispute reports: allows the user to submit disputes and review reports for the status of submitted disputes.  
*Dispute reports will be presented in a separate training session.*



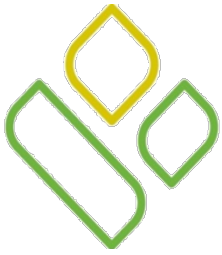
# CGDP Portal DPP-Manufacturers Reports Type Selection Region (continued)

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③  Invoice  Data  Dispute  Batch  Sponsor 1099 Information

- Sponsor 1099 Information reports: allows the user to view the information formerly collected in the EFT File. allows the user to submit disputes and review reports for the status of submitted disputes





# CGDP Portal DPP-Manufacturers Reports Filter - Invoice and Data Region

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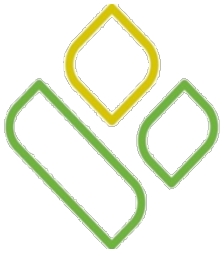
The fourth region of the **Reports** tab, the **Reports Filter – Invoice** or **Data region**, displays when the Invoice or Data radio button is selected in the **Reports Type Selection region**.

The **Reports Filter – Invoice and Data regions** contains the following two fields to assist with narrowing distributed invoice search criteria.

A screenshot of a web interface showing two dropdown menus. The first is labeled 'Corporate ID:' and has 'XP1\_\_4' selected. The second is labeled 'P Number:' and has 'ALL' selected. A blue circular button with a right-pointing arrow is on the right side of the form. A red circle with the number '4' is positioned to the left of the 'Corporate ID' dropdown.

- Corporate ID: defaults to the Corporate ID, formerly the Mailbox ID, used to log into the Portal.
- P Number: displays the P Number for distributed invoices. The drop down list provides update capability to select any P Number from those assigned to the Corporate ID.

In the example, the Corporate ID field displays the default Corporate ID used to access the Portal and the P Number field displays the default of 'ALL'.



# CGDP Portal DPP-Manufacturers Reports Filter Results - Invoice Region

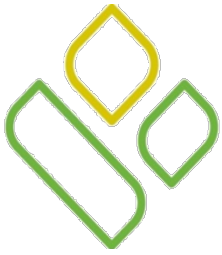
The fifth and final region of the **Reports – Invoice** tab, the **Reports Filter Results - Invoice region**, displays when the Invoice radio button is selected in the **Report Type Selection region** and provides information requested for invoice reports.

5

Corporate ID	P Number	Reporting Period	Date Loaded	Download	Last Download
XP1__4	P1__4	201404	01/31/2015	<input type="radio"/>	
	P1__8	201404	01/31/2015	<input type="radio"/>	
	P1__1	201404	01/31/2015	<input type="radio"/>	

This region contains the following six fields used to review information of distributed invoices and provides the user the ability to download the information for review.

- Corporate ID: defaults to the Corporate ID, formerly the Mailbox ID, utilized to access the system.
- P Number: displays a specific P Number or all P Numbers associated with the Corporate ID.
- Reporting Period: displays the distributed invoice information by reporting period in YYYYQQ format.
- Date Loaded: displays the invoice distribution date. This date corresponds to the end of month following reporting period closing. Date format is DD/MM/YYYY.
- Download: displays radio button to allow downloading of distributed invoice information loaded to the system.
- Last Downloaded: displays the last date and time distributed invoice report data retrieved from the Portal. Date format is YYYY/MM/DD. Time format is HH:MM.



# CGDP Portal DPP-Manufacturers Reports Filter Results – Data Region

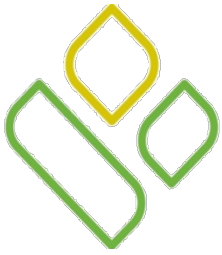
- The fifth and final region of the **Reports – Data** tab, the **Reports Filter Results - Data region**, displays when the Invoice radio button is selected in the **Report Type Selection region** and provides information requested for data reports.

5

Corporate ID	P Number	Reporting Period	Date Loaded	Download File	Last Report Downloaded Date	Download Spreadsheet	Last Spreadsheet Downloaded Date
XP1_4	P1_4	201304	04/13/2015	<input type="radio"/>		<input type="radio"/>	

This region contains the following eight fields used to review information of distributed invoices and provides the user the ability to download the information for review.

- Corporate ID: defaults to the Corporate ID, formerly the Mailbox ID, utilized to access the system.
- P Number: displays a specific P Number or all P Numbers associated with the Corporate ID.
- Reporting Period: displays the distributed invoice summary by reporting period in YYYYQQ format.
- Date Loaded: displays the invoice distribution date. This date corresponds to the end of month following reporting period closing. Date format is DD/MM/YYYY.
- Download File: displays radio button to allow downloading of distributed data invoice information loaded to the system.
- Last Report Downloaded date: displays the last date and time distributed invoice report data retrieved from the Portal. Date format is YYYY/MM/DD. Time format is HH:MM.



# CGDP Portal DPP-Manufacturers Reports Filter Results – Data Region (continued)

5

Corporate ID	P Number	Reporting Period	Date Loaded	Download File	Last Report Downloaded Date	Download Spreadsheet	Last Spreadsheet Downloaded Date
XP1_4	P1_4	201304	04/13/2015	<input type="radio"/>		<input type="radio"/>	

- Download Spreadsheet: displays radio button to allow downloading of the spreadsheet of distributed invoice summary information loaded to the system
- Last Spreadsheet Downloaded Date: displays the last date and time distributed spreadsheet invoice summary data retrieved from the Web Portal. Date format is YYYY/MM/DD. Time format is HH:MM

# *CGDP PORTAL DPP- MANUFACTURERS*



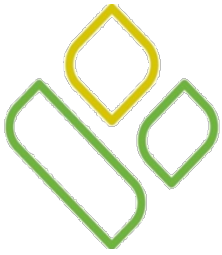
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*Reports – Invoice, Data and  
Sponsor 1099 Information*

*Tab Functionality*

*Work Instruction*

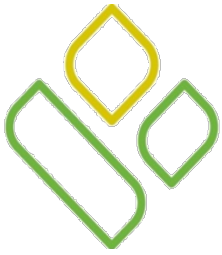


# CGDP Portal DPP-Manufacturers Reports – Invoice Tab Functionality

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You have now learned about the different regions and fields available on the **Reports** tab.

In this section of the training session, a high level overview of the steps needed to utilize the **Reports – Invoice, Data and Sponsor 1099 Information** tabs functionality will be presented on the following slides.



# CGDP Portal DPP-Manufacturers Reports – Invoice Tab Functionality

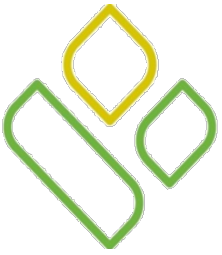
On the **Home** tab, select the **Reports** tab view the report types available for the Manufacturer for the reporting period.

On the **Reports** tab, verify the radio button for Invoice in the **Reports Type Selection region** is populated and select the applicable P Number from the drop down list located in the **Reports - Invoice and Filter region**.

In the following example, the Invoice radio button is populated, the P Number field drop down list displays the selection of ANY and the Download radio button corresponding to P Number P1\_\_8 is populated.

The screenshot shows the 'Manufacturer Portal CGDP Reports' interface. At the top, there are logos for 'PALMETTO GBA' and 'CMS'. A navigation bar includes 'Home', 'Payments', 'Completed', 'Receipts', and 'Reports' (highlighted). Below the navigation bar, the 'Manufacturer Portal CGDP Reports' title is displayed. A 'Current Cutoff Calendar' box on the right lists various dates. The main content area features a 'Reports Type Selection' section with radio buttons for 'Invoice', 'Data', 'Dispute', and 'Batch'. Below this is a 'Filter' section with dropdown menus for 'Corporate ID' (XP1\_\_4) and 'P Number' (ANY). A table below the filters displays report data with columns for Corporate ID, P Number, Reporting Period, Date Loaded, Download, and Last Download. The first row is highlighted, showing Corporate ID XP1\_\_4, P Number P1\_\_8, Reporting Period 201404, Date Loaded 01/31/2015, and the Download radio button selected.

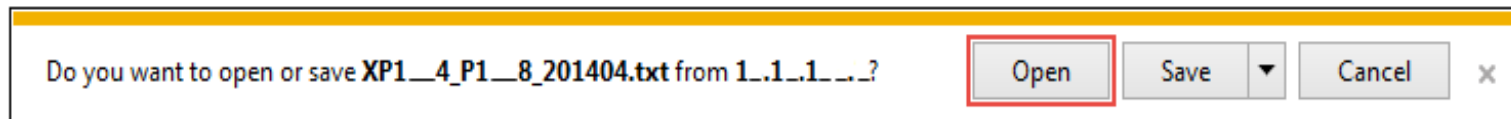
Corporate ID	P Number	Reporting Period	Date Loaded	Download	Last Download
XP1__4	P1__8	201404	01/31/2015	<input checked="" type="radio"/>	
	P1__1	201404	01/31/2015	<input type="radio"/>	
	P1__3	201404	01/31/2015	<input type="radio"/>	



# CGDP Portal DPP-Manufacturers Reports – Invoice Tab Functionality

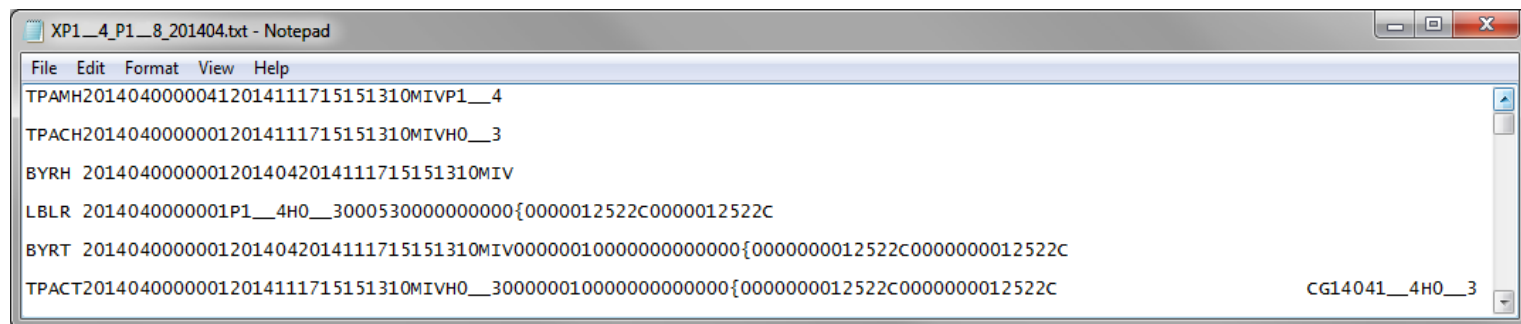
To view the distributed invoice line item report, select one of the following dialog boxes in the message that appears at the bottom of the screen.

- Open: view the data in text file format
- Save: save the data in text file format
- Cancel: exit the decision message

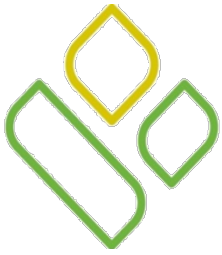


Selecting the Open dialog box will display the distributed invoice information in a text file format.

This example displays an excerpt of an invoice line item text file.







# CGDP Portal DPP-Manufacturers Reports – Invoice Tab Functionality

The **Reports Filter Results - Invoice** region will display the date, in YYYYMMDD format, and time, in HH:MM format, of the last download of the specific invoice line item(s) in the Last Download field.

In the following example, the date of 20150102 and the time of 01:16 populate the Last Download field.

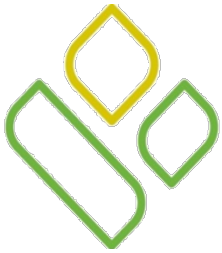
**Manufacturer Portal CGDP Reports**

Invoice  Data  Dispute  Batch  Sponsor 1099 Information

Corporate ID:  P Number:


Reporting Period	201404
Invoice Paid by	03/11/2015
Invoice Distribution	01/31/2015
Dispute Submission	04/02/2015
Dispute Distribution	06/01/2015

Corporate ID	P Number	Reporting Period	Date Loaded	Download	Last Download
XP1__4	P1__8	201404	01/31/2015	<input type="radio"/>	20150102 01:16
	P1__1	201404	01/31/2015	<input type="radio"/>	
	P1__3	201404	01/31/2015	<input type="radio"/>	




# CGDP Portal DPP-Manufacturers Reports – Data Tab Functionality

- In the following example, the Data radio button is populated, the P Number field drop down list displays the selection of ALL and the Download File radio button corresponding to P Number P1\_\_4 is populated.



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## Manufacturer Portal   CGDP Reports

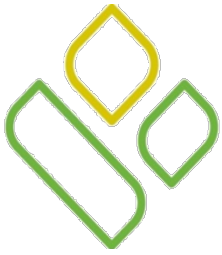
Invoice  Data  Dispute  Batch  Sponsor 1099 Information

Corporate ID:    P Number:  

**Current Cutoff Calendar**

Reporting Period	201501
Invoice Paid By	06/08/2015
Invoice Distribution	04/30/2015
Dispute Submission	06/30/2015
Dispute Distribution	08/29/2015

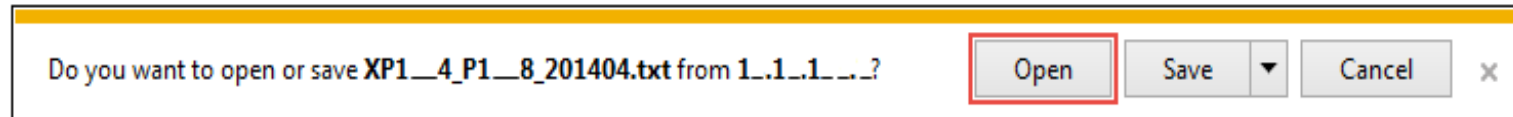
Corporate ID	P Number	Reporting Period	Date Loaded	Download File	Last Report Downloaded Date	Download Spreadsheet	Last Spreadsheet Downloaded Date
XP1_4	P1_4	201304	04/13/2015	<input checked="" type="radio"/>		<input type="radio"/>	



# CGDP Portal DPP-Manufacturers Reports – Data Tab Functionality

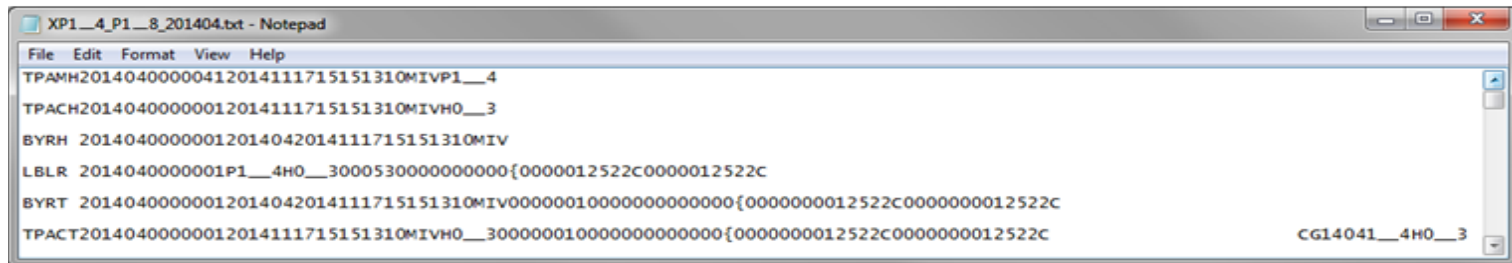
To view the detail invoice line item report, select one of the following dialog boxes in the message that appears at the bottom of the screen.

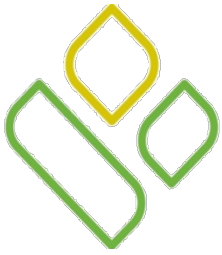
- Open: view the data in text file format
- Save: save the data in text file format
- Cancel: exit the decision message



Selecting the Open dialog box will display the text information for the detail invoice line items.

This example displays an excerpt of an invoice line item text file.







# CGDP Portal DPP-Manufacturers Reports – Data Tab Functionality

The **Reports Filter Results - Data region** will display the date, in MM/DD/YYYY format, and time, in HH:MM format, of the last download of the specific invoice line item(s) in the Last Report Downloaded Date field.

In the following example, the date of 08/18/2015 and the time of 9:06 AM populate the Last Report Downloaded Date field.

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**Manufacturer Portal**    **CGDP Reports**

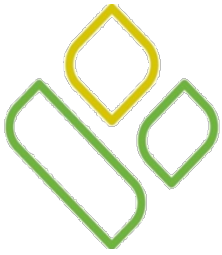
Invoice  **Data**  Dispute  Batch  Sponsor 1099 Information

Corporate ID:     P Number:  

**Current Cutoff Calendar**


Reporting Period	201501
Invoice Paid By	06/08/2015
Invoice Distribution	04/30/2015
Dispute Submission	06/30/2015
Dispute Distribution	08/29/2015

Corporate ID	P Number	Reporting Period	Date Loaded	Download File	Last Report Downloaded Date	Download Spreadsheet	Last Spreadsheet Downloaded Date
XP1_4	P1_4	201304	04/13/2015	<input type="radio"/>	Last downloaded on 08/18/2015 @ 9:06 AM	<input type="radio"/>	




# CGDP Portal DPP-Manufacturers Reports – Data Tab Functionality

- In the following example, the Data radio button is populated, the P Number field drop down list displays the selection of ALL and the Download Spreadsheet radio button corresponding to P Number P1\_\_4 is populated.



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Home   Payments   Completed   Receipts   **Reports**

## Manufacturer Portal   CGDP Reports

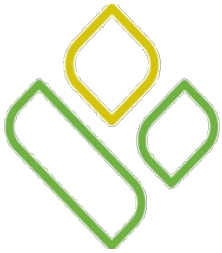
Invoice  Data  Dispute  Batch  Sponsor 1099 Information

Corporate ID: XPI\_\_4   P Number: ALL

**Current Cutoff Calendar**

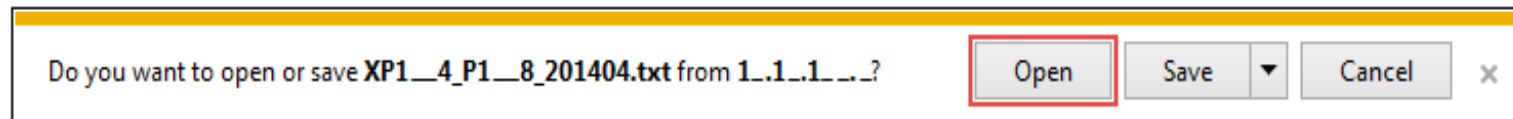
Reporting Period	201501
Invoice Paid By	06/08/2015
Invoice Distribution	04/30/2015
Dispute Submission	06/30/2015
Dispute Distribution	08/29/2015

Corporate ID	P Number	Reporting Period	Date Loaded	Download File	Last Report Downloaded Date	Download Spreadsheet	Last Spreadsheet Downloaded Date
XPI__4	P1__4	201304	04/13/2015	<input type="radio"/>		<input checked="" type="radio"/>	



# CGDP Portal DPP-Manufacturers Reports – Data Tab Functionality

- To view the detail invoice line item report, select one of the following dialog boxes in the message that appears at the bottom of the screen.
  - Open: view the data in text file format
  - Save: save the data in text file format
  - Cancel: exit the decision message



Selecting the Open dialog box will display the distributed invoice information in a spreadsheet format.

This example displays an excerpt of an invoice line item spreadsheet file.

TPAMH - MANUFACTURER P-NUMBER (pos 38-42)	TPAMH - CURRENT REPORTING PERIOD (pos 6-11)	TPALH - LABELER CODE (pos 44-48)	DETCG - RECORD TYPE CODE (pos 1-5)	DETCG - REPORT ID (pos 6-11)	DETCG - SEQUENCE NO (pos 12-18)	DETCG - DETAIL REF NUMBER (pos 19-38)	DETCG - PREVIOUS REPORT ID (pos 39-44)	DETCG - PRODUCT SERVICE ID (pos 45-63)
P1_4	201304	68968	DETCG	201208	0000001	689680043620874	201204	6896000000
P1_4	201304	68968	DETCG	201208	0000002	689680043620874	201205	6896000000
P1_4	201304	68968	DETCG	201304	0000001	689680043620874	201301	6896000000



# CGDP Portal DPP-Manufacturers Reports– Sponsors 1099 Information Tab Functionality

- Manufacturers are able to utilize the Sponsor 1099 Information Reports functionality to view 1099 information formerly collected on the EFT file
- In the following example, the Sponsor 1099 Information radio button is populated, the Corporate ID field drop down list displays XP1\_4 the selection of Download Spreadsheet is populated.

The screenshot displays the CGDP Portal interface for Manufacturers. At the top left, the Palmetto GBA logo is shown, along with the CMS logo (Centers for Medicare & Medicaid Services). Navigation links for Contact Us, My Profile, Logout, Help, and Reporting are in the top right. A menu bar includes Home, Payments, Completed, Receipts, and Reports. The main heading is "Manufacturer Portal CGDP Reports". Below this, a row of radio buttons allows selection of "Invoice", "Data", "Dispute", "Batch", or "Sponsor 1099 Information", with the latter being selected. A "Corporate ID" dropdown menu shows "XP1\_4". At the bottom, another row of radio buttons offers "Download Text File" or "Download Spreadsheet", with the latter selected. A "Current Cutoff Calendar" table is also visible on the right side.

Reporting Period	201501
Invoice Paid By	06/08/2015
Invoice Distribution	04/30/2015
Dispute Submission	06/30/2015
Dispute Distribution	08/29/2015



# CGDP Portal DPP-Manufacturers Reports– Sponsors 1099 Information Tab Functionality

- To view the EFT related information report, select one of the following dialog boxes in the message that appears at the bottom of the screen.
  - Open*: view the data in text file format
  - Save*: save the data in text file format
  - Cancel*: exit the decision message



Selecting the *Open* dialog box will display the distributed invoice information in a text file format.

This example displays an excerpt of the Sponsor 1099 Information Report spreadsheet file.

Contract Number	Contract Name	EIN	IRS Name	IRS Street Address 1	IRS Street Address 2	IRS City	IRS State	IRS Zip	For Future Use
H****	Sponsor Name	111111111	Sponsor IRS Name	154 LOUISIANA AVENUE NW		WASHINGTON	DC	20001	
E****	Sponsor Name	222222222	Sponsor IRS Name	911 WILSON BOULEVARD		Cleveland	NC	22203	
S****	Sponsor Name	333333333	Sponsor IRS Name	1000 Main Street		Clinton	NY	24422	



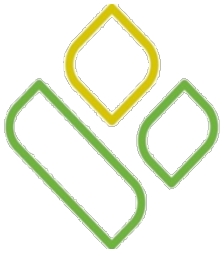
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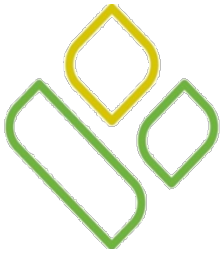
# CGDP Portal DPP-Manufacturers –Training Review

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In this training session you have learned about the CGDP Portal DPP-Manufacturers **Reports** tab and the **Reports – Invoice, Data and Sponsor 1099 Information** functionality.

This training introduced you to the following topics:

1. First look introduction of the **Reports** Tab
2. **Reports** tab regions
  - **Tabbed region – Reports**
  - **Reports Current Cutoff Calendar region**
  - **Reports Type Selection region**
  - **Reports Filter – Invoice and Data regions**
  - **Reports Filter Results – Invoice and Data regions**
3. Work Instruction for utilizing the **Reports – Invoice, Data and Sponsor 1099 Information** tab functionality



# CGDP Portal DPP-Manufacturers – Questions

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Questions?

