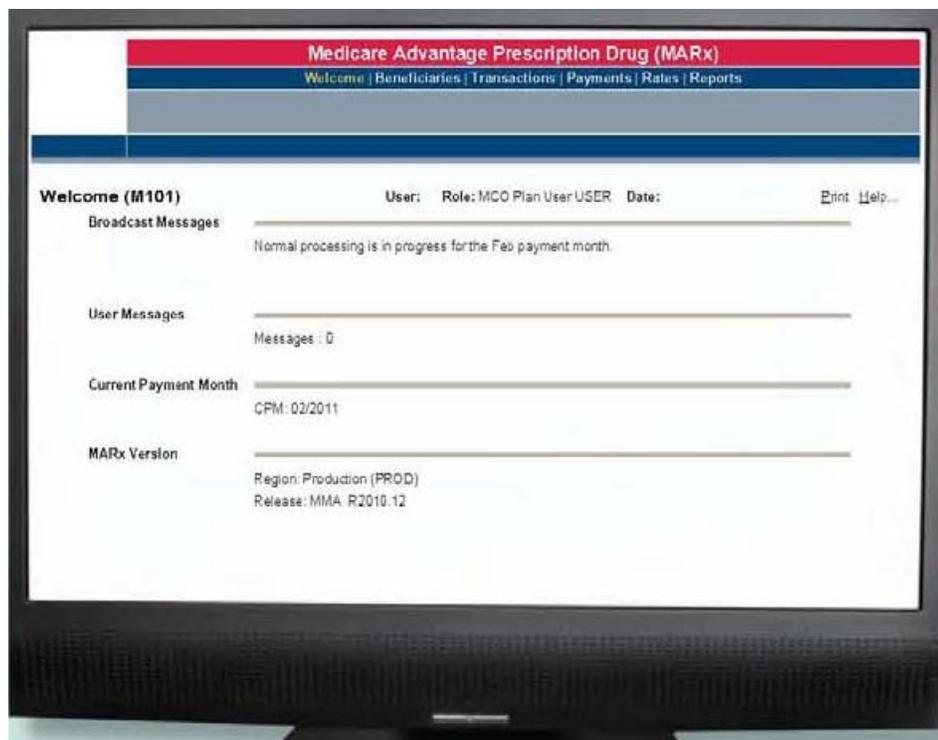


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Reference Guide for Updates via the MARx User Interface



Plan User with Update Role

June 2011

MARx Step by Step

Introduction

This document is intended to provide additional information for Plan MARx users with UI Update capabilities (the “MCO Representative UI Update” role).

This document provides the steps in MARx necessary to perform various tasks via the Update User Interface including: completing a new enrollment, completing a disenrollment, updating an existing enrollment, canceling an enrollment or disenrollment and other commonly used miscellaneous transactions.

Appropriate Transaction Reply Codes (TRCs) will be generated for all successful transactions and will appear on the appropriate plan’s Daily Transaction Reply Report (TRR).

CMS permits a maximum of two (2) users with the MCO Representative UI Update role per parent organization. Processing MARx actions via the UI is not intended to replace the current batch processing model. All actions completed via the MARx UI are subject to Quality Review by CMS.

Please contact the MAPD Help Desk for additional assistance at 1-800-927-8069 or by email at mapdhelp@cms.hhs.gov.

MARx Step by Step

NEW ENROLLMENT

To complete a **New Enrollment**, which is equivalent to a **Transaction Code (TC) 61** in batch processing, log on to the MARx UI and do the following:

- 1) From the **Welcome (M101)** screen, click on **|Beneficiaries|**.
- 2) Click on **|New Enrollment|**.
- 3) The **Beneficiaries: New Enrollment Screen (M221)** will display.
- 4) Enter all of the required Beneficiary data.
NOTE: An ‘*’ indicates required fields that must be completed.
- 5) **CLICK** on the **[Enroll]** button at the bottom of the **Beneficiaries: New Enrollment (M221)** screen to **submit** the New Enrollment.
- 6) **Note:** After clicking the **|Enroll|** button, a status message will display providing confirmation that the Enrollment request has been **submitted** or indicating a **problem has been encountered**.
- 7) If necessary click the **[RESET]** button at the bottom of the screen to clear the (M221) screen to start over.
- 8) To **exit** the **Beneficiaries: New Enrollment (M221)** screen **without submitting an enrollment**, click on any selection on the top **blue bar** to exit the (M221) screen.
- 9) The **Beneficiaries: New Enrollment Screen (M221)** is shown as an example on the next page.

MARx Step by Step

Beneficiaries: New Enrollment (M221) Screen

CMS Medicare Advantage Prescription Drug (MARx)
Welcome | [Beneficiaries](#) | [Transactions](#) | [Payments](#)
Find | [New Enrollment](#) | [Eligibility](#)

Beneficiaries: New Enrollment (M221) User: B4ZS Role: MCO REPRESENTATIVE W/ UPDATE Date: 2/10/2011 [Print](#) [Help...](#)

Enter all required field information and click "Enroll".
Required fields vary depending on type of contract provided.
* Indicates required field

*Claim #	Tracking ID			
<input type="text"/>	<input type="text"/>			
*Last Name	*First Name	M.I.		
<input type="text"/>	<input type="text"/>	<input type="text"/>		
*Birth Date	*Sex			
<input type="text"/>	<input type="text"/>			
*Contract #	PBP	Segment		
<input type="text"/>	<input type="text"/>	<input type="text"/>		
*Effective Date				
<input type="text"/>				
*Application Date	Creditable Coverage Indicator	Number of Uncovered Months		
<input type="text"/>	<input type="text" value="Y - Yes"/>	<input type="text" value="000"/>		
*Election Type	ESRD Override			
<input type="text"/>	<input type="text" value="0"/>			
*Request Type	<input type="checkbox"/> EGHP			
<input type="text" value="ENROLLMENT"/>	Part C Premium			
	<input type="text" value="0.00"/>			
<input type="checkbox"/> Employer Subsidy Enrollment Override	*Enrollment Source			
	<input type="text" value="B - BENEFICIARY ELECTION"/>			
Primary BIN	Primary PCN	Primary GRP	Primary RxID	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Secondary Drug Insurance	Secondary Rx BIN	Secondary Rx PCN	Secondary Rx Group	Secondary Rx ID
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

[Enroll](#) [Reset](#)

MARx Step by Step

Disenrollment

To complete a **Disenrollment** action, which is equivalent to **Transaction Code (TC) 51** in batch processing, log on to the MARx UI and complete the following:

- 1) From the **Beneficiaries: Find (M201)** screen enter the Beneficiary's claim # that is to be updated.
- 2) **Click** the **|FIND|** button. If you select **|RESET|** the field will be cleared out.
- 3) The **Beneficiaries: Search Results (M202)** screen will now display.
- 4) **Click** on the **Update Enrollment** under the Action Column on the **grey bar**.
- 5) The **Update Enrollment (M212)** screen will now display.
- 6) **Click** the **Check Box** on the row for the **Disenrollment** and enter an **End date** under the **End Date** column.

NOTE: Date must be **last day** of month—**Ex: 12/31/2011** and is a **required field** for a disenrollment entry.

- 7) **Select** a **Disenrollment Reason** from the **Dropdown List** under the **Disenroll Reason column in grey**.
- 8) **Click** the **|MORE|** button under the **grey *More Info*** and the **Additional Update Enrollment Information (M230)** screen will display.
- 9) **Select** under the **Disenrollment Dropdown List column in grey**, a **Disenrollment Type** for the transaction.
- 10) **NOTE:** If the Beneficiary decides to be disenrolled from the Plan and to **NOT** be Auto-Enrolled into a new Plan the following month then the **|PART-D AE-FE Opt-Out|** Flag on the (M230) screen **MUST** be checked. This rule can be applied by a **TC79** Part D Opt Out Option Flag thru a Batch transaction as well.
- 11) **Click** the **|Save and Return to Update Enrollment|** button.
- 12) The Update Enrollment (M212) screen displays. **Click** the **|SUBMIT|** button to process the disenrollment.
- 13) A message will be returned indicating **successful update** or **error encountered**.

MARx Step by Step

Updating Rx Insurance Information for a Beneficiary

Below are instructions for updating Rx information for an enrollee, which is similar to a **Transaction Code (TC) 72 4Rx Update** in batch processing.

- 1) From the MARx main menu:
Click on the **|Beneficiaries|** menu item.
The *Beneficiaries: Find (M201)* screen displays with the **|Find|** submenu already selected.
- 2) Enter Beneficiary **Claim #** and click the **[Find]** button
- 3) From the Beneficiary Search Results (**M202**) screen,
Select the **Claim # link** to display the Beneficiary Snapshot (**M203**) screen, and then select the **|Rx Insurance|** tab. The Rx Insurance View (**M244**) screen displays.
- 4) From the Rx Insurance View (**M244**) screen, click the **[Update]** button to change drug insurance information. The *Update Enrollment (M212)* screen displays.
Click the **|Update Rx Insurance|** tab.

The Update Rx Insurance (**M228**) screen displays.

- 5) **The ‘New’ Row for Primary Drug Insurance Information**
Use this row on the Update Rx Insurance (**M228**) screen to enter new Primary Rx Insurance information, along with the time period when it is effective, and the contract and PBP that the beneficiary is enrolled in during the applicable time period.

Primary Rx Insurance can only be added for periods during which the beneficiary’s enrollment is in a contract to which the Plan has access.

The ‘New’ Row for Secondary Drug Insurance Information

Use this row on the Update Rx Insurance (**M228**) screen to enter new Secondary Rx Insurance information.

Note: Make sure to enter the correct ‘Secondary’ BIN, PCN, GRP, and RxID information

- 6) After completing all required fields, click the **|Submit|** button to update the beneficiary’s 4Rx information. The current 4Rx period will be end dated and the new 4Rx period will be displayed on the (**M228**) screen.

Note: If necessary click the **[RESET]** button at the bottom of the screen to clear the (**M228**) screen to start over, or click on the **|Close|** button to exit the Update Rx Insurance (**M228**) screen and return to the Rx Insurance View (**M244**) screen.

MARx Step by Step

Updating Number of Uncovered Months (NUNCMO) for a Beneficiary

Below are instructions for updating NUNCMO information for a beneficiary, which similar to a **Transaction Code (TC) 73** Number of Uncovered Months change in batch processing.

- 1) From the MARx main menu:
Click on the **|Beneficiaries|** menu item.
The *Beneficiaries: Find (M201)* screen displays with the **|Find|** submenu already selected.
- 2) Enter Beneficiary **Claim #** and click the **[Find]** button
- 3) From the Beneficiary Search Results (**M202**) screen,
Select the **Claim # link** to display the Beneficiary Snapshot (*M203*) screen, and then select the **|Premiums|** tab.

The **Premiums View (M231)** screen displays.

- 4) From the Premiums View (**M231**) screen, click the **|Update|** button to change NUNCMO data. The Update Enrollment (**M212**) screen displays.
Click the **|Update Premiums|** tab.

The Update Premiums (**M226**) screen displays.

- 5) Enter the actual Number of Uncovered Months (NUNCMO) for the Beneficiary for the appropriate Contract#/ PBP. Verify that the **Start Date** field matches the **Contract period** and enter the NUNCMO in the appropriate row under the **|Incremental Uncovered Months|** column.
- 6) After completing all required fields, click the **|Submit|** button to update the Beneficiary's Number of Uncovered Months.

If necessary click the **[RESET]** button at the bottom of the screen to clear the (**M226**) screen to start over, or click on the **|Close|** button to exit the Update Premiums (**M226**) screen and return to the Beneficiary Snapshot (*M203*) screen.

MARx Step by Step

Updating Current Enrollment to reflect EGHP (Employer Group Health Plan) Flag

Below are instructions for updating the EGHP status flag for an enrollee, which is similar to a **Transaction Code (TC) 74** EGHP flag change in batch processing.

- 1) From the MARx main menu:
Click on the **|Beneficiaries|** menu item.
The Beneficiaries: Find (**M201**) screen displays with the **|Find|** submenu already selected.
- 2) Enter Beneficiary **Claim #** and click the **[Find]** button or press the Enter key.
The Beneficiary Search Results (**M202**) screen displays.
- 3) From the Beneficiary Search Results (**M202**) screen,
Select the **Claim # link** to display the Beneficiary Snapshot (**M203**) screen.
- 4) From the Beneficiary Snapshot (**M203**) screen, click the **|Update|** button. The Update Enrollment (**M212**) screen displays showing the beneficiary's current enrollment.
- 5) From the Update Enrollment (**M212**) screen, click the **|More|** button on the row for which the enrollment is being updated. The Additional Update Enrollment Information (**M230**) screen displays.
- 6) From the Additional Update Enrollment Information (**M230**) screen, click the checkbox in the **EGHP** column to activate the beneficiary as being an EGHP beneficiary.
- 7) After verifying all information to be correct, click on the **|Save and Return to Update Enrollment|** button to return to the Update Enrollment (**M212**) screen.

If necessary click the **[RESET]** button at the bottom of the screen to clear the (**M230**) screen to start over.

Also, if necessary, click the **[Return without Saving]** button at the bottom of the screen to exit the Additional Update Enrollment Information (**M230**) screen and return to the Update Enrollment (**M212**) screen.

MARx Step by Step

Updating the Beneficiary Residence Address

Below are instructions for updating Beneficiary Residence Address information for an enrollee, which is similar to a **Transaction Code (TC) 76** Update Beneficiary Residence Address in batch processing.

- 1) From the MARx main menu:
Click on the **|Beneficiaries|** menu item.
The *Beneficiaries: Find (M201)* screen displays with the **|Find|** submenu already selected.
- 2) Enter Beneficiary **Claim #** and click the **|Find|** button
- 3) From the Beneficiary Search Results (**M202**) screen,
Select the **Claim # link** to display the Beneficiary Snapshot (**M203**) screen, and then select the **|Residence Address/** tab to display the Residence Address (**M243**) screen.
- 4) Residence Address (**M243**) screen. If only one address is on file for the beneficiary, this screen is blank and an error message displays stating:
‘No Residence Address information found for HICN#’.

From the Residence Address (**M243**) screen, click the **|Update|** button. The Update Enrollment (**M212**) screen displays showing the Beneficiary’s current enrollment.

From the Update Enrollment (**M212**) screen, select the **|Update Residence Address|** tab.

- 5) After selecting the **|Update Residence Address|** tab, the Update Residence Address (**M242**) screen displays. The first row in the address table is blank regardless of the number of beneficiary addresses on file.

Type the current address in the **New** row fields and then click the **|Submit|** button.

- 6) After clicking the **|Submit|** button the following messages may appear on the screen providing all fields are correctly filled in:
‘The residence address information has been updated’
‘RESIDENCE ADDRESS CHANGED ACCEPTED, NEW SCC’

If necessary click the **[RESET]** button at the bottom of the screen to clear the (**M242**) screen to start over, or click on the **|Close|** button to exit the Update Residence Address (**M242**) screen and return to the Residence Address View (**M243**) screen.

MARx Step by Step

Cancel Enrollment

Plan Users with the Update role can cancel an existing enrollment, following the required processes in CMS Enrollment guidance for valid cancellations, via the **Cancel Enrollment** function on the MARx UI, which is equivalent to a **Transaction Code (TC) 80** in batch processing. Log on to the MARx UI and complete the following:

This transaction will permanently cancel the enrollment. There is no systems ability to “undo” or reverse a cancellation once completed.

- 1) From the **Beneficiaries: Find (M201) screen** enter the Beneficiary’s Claim # that is to be updated.
- 2) **Click** the [**FIND**] button or press the [**Enter**] key.
Note: If you click on the [**RESET**] button, the Claim # field will be cleared out.
- 3) The **Beneficiaries: Search Results (M202)** screen will now display.
- 4) **Click** on the [Update Enrollment](#) link under the |Action| Column on the **grey bar**.
- 5) The **Update Enrollment (M212)** screen will now display.
- 6) **Select** the row to **Cancel the Enrollment**.
- 7) **Click** [**Cancel Enroll**] button*. **The selected Enrollment is now cancelled.**

***CAUTION!** Once you have submitted a Cancel action by clicking the Cancel Button, the action is complete. Be certain this is the action you desire to take before submitting the action.

MARx Step by Step

Cancel Disenrollment

Plan Users with the Update role can cancel an existing disenrollment that has successfully processed, following the required processes in CMS Enrollment guidance for valid cancellations, via the **Cancel Disenrollment** function on the MARx UI, which is equivalent to a **Transaction Code (TC) 81** in batch processing. Log on to the MARx UI and complete the following:

This transaction will permanently cancel the disenrollment. There is no systems ability to “undo” or reverse a cancellation once completed.

- 1) From the **Beneficiaries: Find (M201)** screen enter the Beneficiary’s Claim # that is to be updated.
- 2) **Click** the [**FIND**] button or press the [**Enter**] key.
Note: If you click on the [**RESET**] button, the Claim # field will be cleared out.
- 3) The **Beneficiaries: Search Results (M202)** screen will now display.
- 4) **Click** on the [Update Enrollment](#) link under the |Action| Column on the **grey bar**.
- 5) The **Update Enrollment (M212)** screen will now display.
- 6) **Select** the check box on the row to **Cancel the Disenrollment**.
Caution - This transaction will permanently remove the disenrollment.
- 7) **Click [Cancel Disenroll] button***. **The selected disenrollment is now cancelled.**

***CAUTION!** Once you have submitted a Cancel action by clicking the Cancel Button, the action is complete. Be certain this is the action you desire to take before submitting the action.

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