



MassHealth

837I
Institutional
Encounter Claims



MassHealth

Standard Companion Guide

837 Post-adjudicated Claims Data Reporting: Institutional

Refers to the Implementation Guides Based on
ASC X12N Version 005010X299A1

April 2024

Disclosure Statement

This *MassHealth Standard Companion Guide* (“Companion Guide”) serves as a companion document to the corresponding ASC X12N/005010X299A1 837 Post-adjudicated Claims Data Reporting: Institutional and its related Addenda (005010X299A1). MassHealth strongly encourages its Trading Partners to use this Companion Guide in conjunction with the *ASC X12 Implementation Guide* to develop the HIPAA batch transaction. Copies of the ASC X12 Technical Report Type 3s (TR3s) are available for purchase at www.x12.org.

This document supplements, but does not contradict, disagree, oppose, or otherwise modify the 005010X299A1 implementation specification in a manner that will make its implementation by users out of compliance. Tables contained in this Companion Guide align with the CAQH CORE v5010 Companion Guide Template. The template is available at www.caqh.org.

About MassHealth

In Massachusetts, the Medicaid and Children’s Health Insurance Program (CHIP) are combined into one program called MassHealth. MassHealth provides comprehensive health insurance and dental coverage for eligible individuals, families, and people with disabilities across the Commonwealth of Massachusetts. The program serves over 2.4 million residents in the state. MassHealth’s coverage is managed and facilitated through an array of programs, including Fee for Service, accountable care organizations (ACOs) and managed care organizations (MCOs), which enable members to choose the plan that best meets their needs. The agency is nationally recognized for providing high quality care in an innovative and cost-effective manner. See www.mass.gov/masshealth.

MassHealth’s Standardized Encounter Data Program (SENDPro)

MassHealth requires that Managed Care Entities (MCE)s submit encounter data to the agency on a weekly basis through its SENDPro solution. SENDPro manages trading partner information, facilitates the exchange of HIPAA ASC X12 and NCPDP transactions, validates HIPAA compliance, and produces acknowledgments for each submitted file. Additional details about SENDPro are detailed below.

Contact for Additional Information

Please note: Further details will be included in future versions of the Companion Guide.

MassHealth Encounter Data Support Services

Email: TBD

Phone Number: TBD

MassHealth Data Warehouse

XXXXX

Preface

This *MassHealth Standard Companion Guide* to the *005010 ASC X12N Technical Report Type 3 Implementation Guide* and associated addenda adopted under Health Insurance Portability and Accountability Act (HIPAA) clarifies and specifies the data content when exchanging transactions electronically with MassHealth. The MassHealth Standard Companion Guide is not intended to convey information that in any way exceeds or replaces the requirements or usages of data expressed in the Implementation Guides. Neither the Executive Office of Health and Human Services nor MassHealth is responsible for any action or inaction, or the effects of such action or inaction, taken in reliance on the contents of this guide.

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1. Introduction

The Health Insurance Portability and Accountability Act of 1996 (HIPAA) requires MassHealth and all other health insurance payers in the United States to comply with the electronic data interchange (EDI) standards for health care as established by the Secretary of the U.S. Department of Health and Human Services (HHS). The ASC X12N implementation guides are the standards of compliance for electronic health care transactions.

This document is intended to provide information from MassHealth to its Trading Partners that provides the information necessary to exchange Electronic Data Interchange (EDI) X12 transactions with the agency. This includes information about specific data requirements, registration, testing and support.

SCOPE

The standard adopted by Health & Human Services (HHS) for electronic health care transactions is ASC X12N Version 005010, which became effective January 1, 2012. Although HHS did not mandate the adoption of the Post-Adjudicated Claims Data Reporting transaction, EOHHHS has adopted the transaction set to support its encounter data submissions from MassHealth Managed Care Entities (MCE)s. The unique version/release/industry identifier code for the Post-adjudicated Claims Data Reporting: Institutional (837) transaction is 005010X299A1.

This Companion Guide assumes compliance with all loops, segments, and data elements contained in the 005010X299A1. It defines the requirements for HIPAA transactions submitted to and/or received from MassHealth.

OVERVIEW

MassHealth created this Companion Guide for MassHealth Managed Care Entities (Trading Partners) to supplement the *ASC X12N Implementation Guide*. This guide contains MassHealth-specific instructions related to the following.

- Data formats, content, codes, business rules, and characteristics of the electronic transaction.
- Technical requirements and transmission options; and
- Information on testing procedures that each Trading Partner must complete before transmitting electronic transactions.

The information in this document outlines MassHealth's requirements for HIPAA standard electronic encounter data reporting. The following standards are in addition to those outlined in the MassHealth provider manuals. These standards in no way supersede MassHealth regulations.

Where applicable, trading partners must use this guide in conjunction with the information available in your MassHealth provider manual.

REFERENCES

The Implementation Guide specifies in detail the required formats for transactions exchanged electronically with an insurance company, health care payer, or government agency. The Implementation Guide contains requirements for the use of specific segments and specific data elements within those segments and applies to all health care providers and their Trading Partners. It is critical that your IT staff or software vendor review this document in its entirety and follow the stated requirements to exchange files with MassHealth while maintaining HIPAA compliance.

The Implementation Guides for ASC X12N and all other HIPAA standard transactions are available electronically at www.x12.org. Information about the X12 Licensing Program can be found at x12.org/products/licensing-program.

ADDITIONAL INFORMATION

The intended audience for this document is the technical and operational staff responsible for generating, submitting, receiving, and reviewing electronic health care transactions.

2. Getting Started

WORKING WITH MASSHEALTH

Managed Care Entity (MCE) Trading Partners can exchange electronic health care transactions with MassHealth by directly uploading and downloading transactions via the SENDPro portal, Secure File Transfer Protocol (SFTP), or system-to-system using the SENDPro's connectivity submission method. Submitters must determine whether they will use SFTP or industry standard, Simple Object Access Protocol (SOAP) / Web Services Description Language (WSDL) or Hypertext Transfer Protocol (HTTP) Multipurpose Internet Mail Extensions (MIME) Multipart Web service to support the submission of encounter data to MassHealth.

After determining the transmission method, each Trading Partner must successfully complete testing of the connectivity protocol and the HIPAA transaction. Additional information regarding testing is noted in the next section of this companion guide. After successful completion of testing, trading partners may exchange production transactions with MassHealth.

TRADING PARTNER REGISTRATION

Trading Partners are required to sign a Trading Partner Agreement (TPA), as described in [Section 9](#). If you have elected to use a third party to perform electronic transactions on your behalf, they will also be required to complete a TPA. If you or your submitter have already completed this form, you are not required to complete it again.

CERTIFICATION AND TESTING OVERVIEW

All MCE Trading Partners that exchange electronic batch transactions with MassHealth must complete Trading-Partner testing. At the completion of testing, Trading Partners will receive approval from MassHealth to submit transactions in the production environment.

Test transactions exchanged with MassHealth should include a representative sample of the various types of encounter scenarios that Managed Care Entities would normally submit to MassHealth. This includes typical transactions received from enrolled health plan providers that were then adjudicated by your organization. The size of each test file should be between 25 and 50 transactions.

3. Testing with SENDPro

Each MCE Trading Partner must complete testing. Trading Partner testing includes HIPAA compliance testing, as well as validating the use of conditional, optional, and mutually defined components of the transaction.

SENDPro will process de-identified transactions in a test environment to verify that the file structure and content meet HIPAA standards and MassHealth-specific data and business requirements. MassHealth will also verify the quality of the data submitted within the test files. MCEs will receive responses for every test file submitted. MCEs should review 999 Implementation Acknowledgement and 277 Data Reporting Acknowledgement reports for errors, make the appropriate corrections, and resubmit updated test files. [Section 8](#) of this Companion Guide provides a brief description of the 999 and 277DRA reports.

Please note: Trading partners will not be allowed to submit encounter data transactions in the production environment until they have successfully passed both data quality validation and HIPAA standards testing. Once this testing and validation is complete, the Trading Partner may submit transactions to MassHealth's SENDPro for processing.

For the purposes of SENDPro implementation, please refer to discussions with MassHealth MCE Communications group for further details.

4. Connectivity with SENDPro/Communications

This section outlines how MCE Trading Partners may connect and communicate with MassHealth to exchange ASC X12N-formatted batch transactions via the SENDPro.

TRANSMISSION ADMINISTRATIVE PROCEDURES

System Availability

The system is typically available 24 hours a day, seven days a week, except for scheduled maintenance windows. Please ensure that files are submitted only from Monday 8 am to Friday 6 pm ET. Files submitted after 6 am EST Friday will undergo processing once SENDPro completes its maintenance window.

TRANSMISSION FILE SIZE

Transmission sizes are defined based on two factors:

- Number of Segments/Records allowed by HIPAA Standards
- HIPAA standards limit the size of the transaction (ST-SE envelope) to a maximum of 5000 CLM segments.
- File size limitations (*Please note: Will be updated in the future versions of the Companion Guide*)

Please note that SENDPro does not unzip or decompress files. Transmit all files in an unzipped or uncompressed format.

TRANSMISSION ERRORS

Upon the submission of the file by the trading partner and its successful reception by SENDPro, responses in the form of TA1 and 999 acknowledgment transactions are generated within 1 hour of file ingestion. These generated responses will be deposited into the relevant folder on the trading partner's SFTP server.

SENDPro generates positive 999 acknowledgements if the submitted file meets HIPAA standards related to syntax and data integrity. For files that do not meet the HIPAA standards, a negative TA1 and/or negative 999 are generated describing the validation error(s) and sent to the trading partner.

PRODUCTION FILE-NAMING CONVENTION

For Inbound transactions, use the below naming convention:

submitterid_transactionid_transtype_datetime_env

For example, a production 837 D file submitted on January 4, 2024, at 2:30 p.m. ET, by a TP with a three-digit PID of “xyz” might be named:

xyz_pacdrd_010420241430_prod

If a file is intended for a specific request, it is essential to include this specificity in the naming convention to facilitate easy identification of the file. In the case of this process, the naming convention is as follows:

submitterid_transactionid_transtype_datetime_env_XXX

The three-character alpha suffix xxx defines the exception when needed.

RETRANSMISSION PROCEDURE

SENDPro does not require any identification of a previous transmission of a file. SENDPro processes each file independently of other files; therefore, all files sent should be marked as original transmissions.

COMMUNICATION PROTOCOL SPECIFICATIONS

SENDPro offers Council for Quality Healthcare Committee on Operating Rules for Information Exchange (CAQH CORE) connectivity submission methods using one of the two Envelope Standards; HTTP MIME Multipart or Simple Object Access Protocol (SOAP)/Web Services Description Language (WSDL). However, this rule is not intended to require trading partners to remove existing connections that do not match the rule, nor is it intended to require that all CAQH CORE trading partners must use this method for all new connections. SENDPro provides the following methods for submitting batch EDI transaction files.

Please note: Additional instructions for SOAP/MIME connectivity to be provided in future updates to the Companion Guide.

SENDPro provides the following methods for submitting batch EDI transaction files.

CONNECTIVITY SUBMISSION METHOD

MCE trading partners can send 837 Encounters Transactions to MassHealth using one or both of the following methods:

- Batch using Secure File Transfer Protocol (SFTP)
- SENDPro Web Portal (MFTP - MOVEit File Transfer protocol)

Please refer to communications from MassHealth MCE Communications for additional details.

5. Contact Information

EDI CUSTOMER SERVICE

MassHealth Encounter Data Support Services

Days Available: Monday through Friday

Time Available: TBD

Email: TBD

Phone: TBD

Fax: TBD

EDI TECHNICAL ASSISTANCE

MassHealth Encounter Data Support Services

Days Available: Monday through Friday

Time Available: TBD

Email: TBD

Phone: TBD

Fax: TBD

Please note: Further details will be updated in the next iteration of the CG.

APPLICABLE WEBSITES/EMAIL

Accredited Standards Committee (ASC X12)

- ASC X12 develops and maintains standards for interindustry electronic interchange of business transactions. See www.x12.org.

Centers for Medicare & Medicaid Services (CMS)

- CMS is the agency within HHS that administers the Medicare and Medicaid programs. CMS provides the Electronic Health Care Transactions and Code Sets standards at <https://www.cms.gov/Regulations-and-Guidance/Administrative-Simplification/HIPAA-ACA/index>.

Committee on Operating Rules for Information Exchange (CORE)

- A multiphase initiative of CAQH, CORE is a committee of more than 100 industry leaders who help create and promulgate a set of voluntary business rules focused on improving physician and hospital access to electronic patient insurance information at or before the time of care. See www.caqh.org.

Council for Affordable Quality Healthcare (CAQH)

- CAQH is a nonprofit alliance of health plans and trade associations, working to simplify health care administration through industry collaboration on public-private initiatives. Through two initiatives – the Committee on Operating Rules for Information Exchange (CORE) and Universal Provider Data source (UPD) – CAQH aims to reduce administrative burden for providers and health plans. See www.caqh.org.

MassHealth (MH)

- The MassHealth website assists providers with HIPAA billing and policy questions, as well as enrollment support. See www.mass.gov/masshealth.

National Committee on Vital and Health Statistics (NCVHS)

- The National Committee on Vital and Health Statistics was established by Congress to serve as an advisory body to the U.S. Department of Health and Human Services on health data, statistics, and national health information policy. See www.ncvhs.hhs.gov/.

National Council of Prescription Drug Programs (NCPDP)

- The NCPDP is the standards and codes development organization for pharmacy. See www.ncdp.org.

Washington Publishing Company (WPC)

- WPC is a resource for HIPAA-required transaction implementation guides and code sets. See <http://www.wpc-edi.com/>.

6. Control Segments/Envelopes

ISA (INTERCHANGE CONTROL HEADER)

This section describes MassHealth's use of the interchange control segments. It includes the expected sender and receiver codes, authorization information, and delimiters. All ISA segments within a single file must be consistent with the exception of the date/time and control # data elements. The chart below and all charts in this document align with the CAQH CORE v5010 Companion Guide Template format. The template is available at www.cagh.org.

TR3 Page #	Loop ID	Reference	Name	Codes	Notes/Comments
C.3	----	ISA	Interchange Control Header		
C.4	-----	ISA01	Authorization Information Qualifier	00	
C.4	-----	ISA02	Authorization Information		10 blank spaces
C.4	-----	ISA03	Security Information Qualifier	00	
C.4	-----	ISA04	Security Information		10 blank spaces
C.4	-----	ISA05	Interchange ID Qualifier	ZZ	
C.4	-----	ISA06	Interchange Sender ID		Trading Partner ID assigned by MassHealth (10-character MMIS PID/SL - provider ID/service location). See Section 7 for additional guidance for parent/affiliate MCEs.
C.5	-----	ISA07	Interchange ID Qualifier	ZZ	
C.5	-----	ISA08	Interchange Receiver ID	DMA7384	Post-adjudicated claims from MassHealth Managed Care Entities

GS (FUNCTIONAL GROUP HEADER)

This section describes MassHealth's use of the functional group control segments. It includes the expected application sender and receiver codes. All GS segments within a single file must be consistent with the exception of the date/time and control # data elements.

TR3 Page #	Loop ID	Reference	Name	Codes	Notes/Comments
C.7	-----	GS02	Application Sender's Code		Trading Partner ID assigned by MassHealth (10-character MMIS PID/SL - provider ID/service location). See Section 7 for additional guidance for parent/affiliate MCEs.
C.7	-----	GS03	Application Receiver's Code	DMA7384	Post-adjudicated claims from MassHealth Managed Care Entities

7. MassHealth-Specific Business Rules and Limitations

This section describes MassHealth's business rules. For example:

- Reporting specific scenarios such as coordination of benefits (COB), amounts paid, reporting voids and adjustments, and populated provider identification numbers; and
- Communicating payer specific edits.

Before submitting encounter claims to MassHealth, please review the appropriate HIPAA implementation guide and MassHealth companion guide to ensure the X12 transaction will comply with MassHealth's requirements.

The following sections outline recommendations, instructions, and conditional data requirements for claims submitted to MassHealth. This information is designed to help Trading Partners construct transactions in a manner that will allow MassHealth to efficiently process claims.

ENCOUNTER-SUBMISSION GUIDELINES

ST/SE segments within transactions submitted to MassHealth must not contain more than 5,000 encounters. Submissions larger than 5,000 will be rejected.

MassHealth strongly encourages all submitters to ensure that redundant or excessive transactions are not submitted for processing. Transactions should be submitted to MassHealth only to directly support services that have or will be provided directly to MassHealth members.

ENCOUNTER SENDER/SUBMITTER IDS

For Encounter submissions, SENDPro supports three approaches:

- Parent organizations can submit on their own behalf.
- Parent organizations can submit files on behalf of their affiliates.
- Affiliates can independently submit their own files.

See Appendix C for detailed examples of all three options.

Please note: Additional details will be provided in future versions of the Companion Guides.

TRANSFORMED MEDICAID STATISTICAL INFORMATION SYSTEM (TMSIS)

MassHealth is required to submit TMSIS information to the Centers for Medicare & Medicaid Services (CMS) on a monthly basis. That information includes both medical and pharmacy managed care encounter data. The encounter data that MCEs submit to MassHealth is integral to the completeness and accuracy of that information. Furthermore, CMS requires a number of critical data elements that must be included in every relevant encounter when applicable. It's imperative that MCEs submit any/all federally required TMSIS data within the transaction in order to ensure compliance. However, it's especially important that the following data elements are included in every applicable encounter data submission to MassHealth:

Data Element	Notes
Provider ID/Service Location (PID/SL)	For Billing, Admitting, Referring, Servicing (especially)
Detail and Total Medicaid Paid Amounts	All claim types
Revenue Codes on all Detail lines	837I claims
Detail and Total Allowed Amounts	All claim types
Revenue Charges on all Detail Lines	837I claims
Detail and Total Billed Amounts	All claim types
Provider Taxonomy	For Billing on all claim types except Pharmacy
Medicare Paid, Deductible, Copay, and Coinsurance Amounts	All claim types
Present and Valid NPI values	All provider types (Billing, Admitting, Referring, Servicing, Operating, Prescribing, etc.)

NATIONAL PROVIDER IDENTIFIER (NPI) AND TAXONOMY CODE

MassHealth expects the provider's National Provider Identifier (NPI) in the appropriate NM109 data element and the taxonomy code in the appropriate PRV data element. Trading partners are required to populate all NPIs and taxonomy codes when known.

If you are an atypical provider and do not have an NPI, submit your 15-character internal provider ID (G2) and MassHealth provided PID/SL, in the appropriate Reference Identification (REF) segment according to the rules below.

SECONDARY PROVIDER IDENTIFIERS

In addition to the NPI, MassHealth expects Managed Care Entities to populate **ALL** secondary provider identifiers in the allowable and appropriate REF segments. This includes the following:

Qualifier	IG Definition	MassHealth Description
G2	Provider Commercial Number	<p>Internal Provider Number</p> <p>MCEs must populate G2 with both the Internal Provider number and the MassHealth PID/SL in the event the LU qualifier is not available within a segment and the PID/SL is known. A description of how to populate the date element is shown below:</p> <p>“Internal Provider Number<space>PID/SL” (when known). If the PID/SL is unknown, populate the Internal Provider Number only.</p> <p><i>Details are specified in each Provider ID data element in the Section 10 table.</i></p>
LU	Location Number	<p>PID/SL</p> <p>MCE’s must populate LU with the MassHealth PID/SL when known.</p> <p>In the event the LU qualifier is not available within a segment, MCEs must populate G2 with both the Internal Provider number and the MassHealth PID/SL (if known) as described above.</p> <p><i>Details are specified in each Provider ID data element in the Section 10 table.</i></p>
OB	State License Number	<p>State License Number</p> <p>MCEs must populate the State License Number when known.</p> <p><i>Details are specified in each Provider ID data element in the Section 10 table.</i></p>

ORIGINAL, VOID, AND ADJUSTMENT/REPLACEMENT TRANSACTIONS – OVERPAYMENT RECOVERIES

MassHealth requires MCEs to clearly document adjustments, overpayments, and recoveries by submitting void and replacement encounter data transactions. MassHealth strongly recommends that MCEs submit voids to document a full recovery of a paid transaction and adjustments to document a partial recovery of a paid transaction.

VOID AND ADJUSTMENT/REPLACEMENT TRANSACTIONS

MassHealth strongly recommends that MCEs follow the approach below to report adjustments, overpayments, and recoveries.

Void Transactions: to be used for a full recoveries

- Use Claim Frequency Type “8” in Loop 2300 CLM05-03 to completely void/cancel the paid transaction. This will ensure a complete void of a previously submitted claim.

Adjustment/Replacement Transactions: to be used for a partial recoveries

- Use Claim Frequency Type “7” in Loop 2300 CLM05-03 to adjust or modify a previously paid transaction.

Upon receipt of a void or replacement transaction, MassHealth will validate the following:

- The adjustments/voids are linked to the original claim.
- The appropriate Adjustment Reason Codes are used in Provider Overpayment Scenarios.
- The adjustments are properly updated across header and detail lines to maintain overall claim integrity.

Please note: All validations will occur at the time of 837 encounter claims intake, and post-837 intake at the MassHealth DW.

COORDINATION OF BENEFITS (COB)

COB Claims

MCE trading partners should report all instances of COB scenarios received by providers in their encounter submissions. Information such as the other payer's adjudication amounts and details, subscriber/patient details, line-item details, and adjustment reason codes (using standard claim adjustment reason codes – CARCs) must be reported in the appropriate data elements. Appendices B and C provide business scenario examples for reporting COB.

COB Claims with Medicare

MCE trading partners should report all instances of Medicare COB scenarios received by providers in their encounter submissions. Appendices B and C provide business scenario examples for reporting COB from Medicare.

DENIED CLAIMS

MassHealth requires denied and partially denied claims to be submitted in a separate file from paid claims. Denied claims should be populated where CN104 Contract Code = D and CAS02 Claim Adjustment Reason Codes reflect a denied reason. Partially denied claims should be populated where CN104 Contract Code = R and CAS02 Claim Adjustment Reason Codes reflect denied reason(s) only for the denied claim lines.

8. Acknowledgements and Reports

MassHealth supports three acknowledgement transactions that will be issued in response to the receipt of an 837 Post-Adjudicated Claims Data Reporting Version 005010 transaction: the TA1, 999, and 277DRA. These acknowledgments will replace any/all proprietary reports previously issued by MassHealth in response to proprietary encounter data submissions.

REPORT INVENTORY

THE TA1 INTERCHANGE ACKNOWLEDGEMENT

The TA1 allows the receiver of a file to notify the sender that an invalid interchange structure was received or that problems were encountered. The TA1 verifies only the interchange header (ISA/GS) and trailer (IEA/GE) segments of the file envelope. If ISA or GS errors were encountered, then the generated TA1 report with the Interchange Header errors will be returned.

THE 999 IMPLEMENTATION ACKNOWLEDGEMENT

Each submission of an ASC X12 V5010 file to MassHealth generates a 999 Implementation acknowledgement and is sent to the submitter within one business day.

THE 277 DATA REPORTING ACKNOWLEDGEMENT (277DRA)

This report acknowledges the validity and acceptability of data reporting claim submissions at the pre-processing stage and identifies claims that are accepted as well as those that are not accepted. Please review the 277DRA Companion Guide for MassHealth specific instructions and information.

9. Trading Partner Agreements

MCEs that intend to conduct electronic transactions with MassHealth must sign the MassHealth Trading Partner Agreement (TPA). A copy of the agreement is available for [download \(www.mass.gov\)](http://www.mass.gov) or by contacting MassHealth Encounter Data Support services at (email address TBD, targeting to be provided after Design phase) if you have any questions.

TRADING PARTNERS

MassHealth defines a Trading Partner as any entity (provider, billing service, software vendor, MCE, employer group, financial institution, etc.) that conducts electronic transactions with MassHealth. The Trading Partner and MassHealth acknowledge and agree that the privacy and security of data held by or exchanged between them is of utmost priority. Each party agrees to take all steps reasonably necessary to ensure that all electronic transactions between them conform to the Health Insurance Portability and Accountability Act of 1996 (HIPAA) and regulations promulgated thereunder.

10. Transaction-Specific Information

This section describes how ASC X12N Implementation Guides (IGs) adopted under HIPAA will be detailed with the use of tables. The tables contain a row for each segment that MassHealth has something specific and additional, over, and above, the information in the IGs. That information can

- Limit the repeat of loops, or segments;
- Limit the length of a simple data element;
- Specify a subset of the IGs internal code listings;
- Clarify the use of loops, segments, composite, and simple data elements; and
- Provide other information tied directly to a loop, segment, composite, or simple data element pertinent to trading electronically with MassHealth.

In addition to the row for each segment, MassHealth uses one or more additional rows to describe its usage for composite and simple data elements and for any other information. Notes and comments are placed at the deepest level of detail. For example, a note about a code value is placed on a row specifically for that code value, not in a general note about the segment.

STANDARD CLAIMS

TR3 Page #	Loop ID	Reference	Name	Codes	Notes/Comments
40	1000A	NM103	Submitted Name		The organization name must be consistent with the MassHealth-assigned Trading Partner ID (PID/SL).
40	1000A	NM109	Submitter Identifier		Trading Partner ID (PID/SL) assigned by MassHealth (the 10-character MassHealth MMIS provider number including service location)
42	1000A	PER03	Communication Number Qualification	EM	MassHealth only requires the contact's email address.
45	1000B	NM103	Receiver Name	MassHealth	
45	1000B	NM109	Receiver Primary Identifier	DMA7384	
48	2000A	PRV01	Provider Taxonomy Code	BI	
55	2010AA	NM109	Billing Provider Identifier		If you are an atypical provider and do not have an NPI, populate internal ID in REF02 as well as PID/SL if known using G2 qualifier; otherwise enter the billing provider NPI.
59	2010AA	REF01	Billing Provider Tax Identification Qualifier	EI	
60	2010AA	REF01	Billing Provider License Information	OB	
61	2010AA	REF01	Billing Provider Secondary ID Qualifier	G2	Populate with the "Internal Provider Number<space>PID/SL" (when known). If the PID/SL is unknown, use

TR3 Page #	Loop ID	Reference	Name	Codes	Notes/Comments
					Internal Provider Number only.
63	2000B	HL04	Hierarchical Child Code	0	Subscriber is always the patient in Medicaid.
67	2010BA	NM102	Entity Type	1	MassHealth expects Subscriber to always be a Person.
67	2010BA	NM104	Name First		
68	2010BA	NM109	Subscriber Primary Identifier		Enter the 12-character MassHealth member ID.
78	2010BB	NM103	Data Receiver Name	MassHealth	
95	2300	CLM05-03	Claim Frequency Code	1-5, 7, 8	Indicate the claim frequency using the following codes: 1 = Original; Admit through Discharge 2 = Original; Interim – First Claim 3 = Original; Interim – Continuing Claims 4 = Original; Interim – Last Claim 5 = Original; Late Charge Only 7 = Adjustment/Replacement of Prior Claim 8 = Void/Cancel of Prior Claim
100	2300	DTP02	Admission Date Time Period Format Qualifier	DT	
107	2300	CN101	Contract Type Code		Use Contract Type 05 to report Medicaid Fee for Service Equivalent Amount when other code types are not applicable.

TR3 Page #	Loop ID	Reference	Name	Codes	Notes/Comments
107	2300	CN102	Monetary Amount		
108	2300	CN104	Contract Code	P, R, D	Indicate if a claim is paid, partially paid, or denied using the following codes: P = Paid R = Partially Paid D = Denied
114	2300	REF01	Payer Claim Control Qualifier	F8	
132	2300	HI01-1	Principal Diagnosis	ABK	
136	2300	HI01-1	Admitting Diagnosis	ABJ	Populate when this segment is applicable.
138	2300	HI01-1	Patient's Reason for Visit	APR	Populate when this segment is applicable.
142	2300	HI01-1	External Cause of Injury	ABN	Populate when this segment is applicable.
159	2300	HI01-1	Diagnosis Related Group	DR	Populate when this segment is applicable.
161	2300	HI01-1	Other Diagnosis Information	ABF	Populate when this segment is applicable.
177	2300	HI01-1	Principle Procedure Information	BBR	Populate when this segment is applicable.
180	2300	HI01-1	Other Procedure Information	BBQ	Populate when this segment is applicable.

TR3 Page #	Loop ID	Reference	Name	Codes	Notes/Comments
247	2300	HCP02	Repriced Allowed Amount		
249	2300	HCP12	Repriced Approved Service Unit Count		
253	2310A	NM109	Attending Provider Primary Identifier		
254	2310A	PRV01	Attending Provider Code	AT	
256	2310A	REF01	Attending Provider Secondary ID Qualifier	G2 LU OB	Internal Provider Number PID/SL State License Number
260	2310B	NM109	Operating Physician Primary Identifier		
261	2310B	REF01	Operating Physician Secondary ID Qualifier	G2 LU OB	Internal Provider Number PID/SL State License Number
265	2310C	NM109	Other Operating Physician Primary Identifier		
266	2310C	REF01	Other Operating Physician Secondary ID Qualifier	G2 LU OB	Internal Provider Number PID/SL State License Number
270	2310D	NM109	Rendering Provider ID		
271	2310D	REF01	Rendering Provider Secondary ID Qualifier	G2 LU OB	Internal Provider Number PID/SL State License Number

TR3 Page #	Loop ID	Reference	Name	Codes	Notes/Comments
274	2310E	NM109	Laboratory or Service Facility Primary Identifier		If services were performed on an Indian reservation, use the NPI of the Indian Health Services.
279	2310E	REF01	Service Facility Location Secondary ID Qualifier	G2 LU OB	Internal Provider Number PID/SL State License Number
283	2310F	NM109	Referring Provider ID		
284	2310F	REF01	Referring Provider Secondary ID Qualifier	G2 OB	Populate with the "Internal Provider Number<space>PID/SL" (when known). If the PID/SL is unknown, use Internal Provider Number only. State License Number
292	2320	CAS04	Adjustment Quantity		Populate this data element when corresponding amount (CAS03) is greater than 0.
293	2320	CAS07	Adjustment Quantity		Populate this data element when corresponding amount (CAS06) is greater than 0.
293	2320	CAS010	Adjustment Quantity		Populate this data element when corresponding amount (CAS09) is greater than 0.
294	2320	CAS013	Adjustment Quantity		Populate this data element when corresponding amount (CAS012) is greater than 0.
294	2320	CAS016	Adjustment Quantity		Populate this data element when corresponding amount (CAS15) is greater than 0.
295	2320	CAS019	Adjustment Quantity		Populate this data element when corresponding amount (CAS) is greater than 0.

TR3 Page #	Loop ID	Reference	Name	Codes	Notes/Comments
354	2400	HCP02	Repriced Allowed Amount		
356	2400	HCP12	Repriced Approved Service Unit Count		
368	2420A	NM109	Operating Physician Identifier		
369	2420A	REF01	Operating Physician Secondary ID Qualifier	G2 LU OB	Internal Provider Number PID/SL State License Number
373	2420B	NM109	Other Operating Physician Identifier		
374	2420B	REF01	Other Operating Physician Secondary ID Qualifier	G2 LU OB	Internal Provider Number PID/SL State License Number
378	2420C	NM109	Rendering Provider ID		
379	2420C	REF01	Rendering Provider Secondary ID Qualifier	G2 LU OB	Internal Provider Number PID/SL State License Number
383	2420D	NM109	Referring Provider ID		
384	2420D	REF01	Referring Provider Secondary ID Qualifier	G2 OB	Populate with the "Internal Provider Number<space>PID/SL" (when known). If the PID/SL is unknown, use Internal Provider Number only. State License Number

TR3 Page #	Loop ID	Reference	Name	Codes	Notes/Comments
391	2430	CAS04	Adjustment Quantity		Populate this data element when corresponding amount (CAS03) is greater than 0.
391	2430	CAS07	Adjustment Quantity		Populate this data element when corresponding amount (CAS06) is greater than 0.
392	2430	CAS010	Adjustment Quantity		Populate this data element when corresponding amount (CAS09) is greater than 0.
393	2430	CAS013	Adjustment Quantity		Populate this data element when corresponding amount (CAS012) is greater than 0.
393	2430	CAS016	Adjustment Quantity		Populate this data element when corresponding amount (CAS15) is greater than 0.
394	2430	CAS019	Adjustment Quantity		Populate this data element when corresponding amount (CAS) is greater than 0.

APPENDICES

Appendix A. Implementation Checklist

This appendix contains all necessary steps for implementing the transactions with MassHealth.

- Develop your system to comply with ACS X12N v5010 Technical Reports 3/Implementation Guides.
- Review MassHealth SENDPro Companion Guides to identify and implement necessary changes to your system.
- Complete the SENDPro Connectivity Form.
- Test connectivity.
- Participate in all trading partner testing activities.
- Utilize various real case business scenarios during testing.

Appendix B. Business Scenarios

This appendix contains typical business scenarios. The actual data streams linked to these scenarios are included in Appendix C.

1. MCE's have the option to submit PACDR files as described below:
 - a. Parent submitting for themselves.
 - b. Parent submitting on behalf of their affiliate.
 - c. MCE submitting for themselves.
2. PACDR Institutional containing a denied encounter.
3. PACDR with COB payer
4. PACDR with Medicare COB
5. PACDR Institutional with Void
6. PACDR Institutional with replacement

Appendix C. Transmission Examples

Below are examples of how MCEs should submit PACDR files as described in Appendix B:

1. **Parent**-Tufts Health Together TPID/PIDSL = 110088791A and their **Affiliate** is Tuft's Health Together with CHA: TPID/PIDSL = 110088791E, it would look like this:

- a. Tufts submitting as **Parent** for themselves:

```
ISA*00*      *00*      *ZZ*11008791A  *ZZ*DMA7384  *230809*0813^^*00501*000000954*0*P*:
GS*HC*110088791A*DMA7384*20230809*081356*954*X*005010X299A1
ST*837*0954*005010X299A1
BHT*0019*00*20230809081347003*20230809*081239*RP
NM1*41*2*TUFTS HEALTH TOGETHER*****46*110088791A
```

- b. Tufts submitting as a **Parent** on behalf of their **Affiliate** Tuft's Health Together:

```
ISA*00*      *00*      *ZZ*110088791A  *ZZ*DMA7384  *230809*0813^^*00501*000000954*0*P*:
GS*HC*110088791A *DMA7384*20230809*081356*954*X*005010X299A1
ST*837*0954*005010X299A1
BHT*0019*00*20230809081347003*20230809*081239*RP
NM1*41*2*TUFTS HEALTH TOGETHER WITH CHA*****46*110088791E
```

- c. MCEs submitting for themselves:

```
ISA*00*      *00*      *ZZ*110088791E  *ZZ*DMA7384  *230809*0813^^*00501*000000954*0*P*:
GS*HC*110088791E *DMA7384*20230809*081356*954*X*005010X299A1
ST*837*0954*005010X299A1
BHT*0019*00*20230809081347003*20230809*081239*RP
NM1*41*2*TUFTS HEALTH TOGETHER WITH CHA*****46*110088791E
```

2. PACDR Institutional containing a denied encounter.

```
ISA*00*      *00*      *ZZ*11008791A  *ZZ*DMA7384  *20020901*1230*CH*00501*000000001*0*P*:
GS*HP*11008791A*DMA7384*20230901*1230*1*X*005010X299A1~
ST*837*0001*005010X299A1~
BHT*0019*00*0123*20230901*1230*RP~
NM1*41*2*SUBMITTER MEDICAL CENTER*****46*P123~
PER*IC*IT GROUP*TE*1234567890*EX*231~
NM1*40*2*MASSHEALTH*****46*DMA7384-
HL*1**20*1~
NM1*85*2*ABC MEDICAL CENTER*****XX*1234567890~
N3*4000 E ABC STREET~
N4*INDIANAPOLIS*IN*46204~
REF*24*311400511~
HL*2*1*22*0~
```

SBR*P*18**IHCP*****MC~
 NM1*IL*1*SUBSCRIBER*JILL****MI*100444555999~
 N3*6000 WEST STREET~
 N4*INDIANAPOLIS*IN*46410~
 DMG*D8*19590529*M~
 NM1*PR*2*EDS*****PI*EDS~
 HL*3*2*23*0~
 PAT*10~
 NM1*QC*1*PATIENT*BOB****MI*ABC1234567890~
 N3*236 N Main ST~
 N4*BOSTON*MA*12345~
 DMG*D8*19820519*M~
 CLM*755555M*110***11:A:1*Y*A*Y*1~
 DTP*484*D8*20231019~
 CL1*1*7*3~
 CN1*02*10**D~ (CN104 – D(Denied))
 HI*BK:V723*BF:4660~
 SBR*P*18*G00786***6***CI~
 CAS*CO*39*15~ (Denied CARC)
 AMT*D*0~
 LX*1~
 SV2*0510*HC:99396*110*UN*1~
 SVD*P*0*HC:99396*0510*1~
 CAS*CO*39*15~ (Denied CARC)
 DTP*573*D8*20231103
 SE*44*0001~
 GE*1*1~
 IEA*1*000000001~

3. PACDR Institutional with COB payer

ST*837*0021*005010X299A1-
 BHT*0019*00*244579*20230315*1023*RP-
 NM1*41*2*AHC PLAN*****46*T0J23-PER*IC*IT GROUP*TE*3055552222*EX*231-
 NM1*40*2*MASSHEALTH*****46*DMA7384-
 HL*1**20*1-
 PRV*BI*PXC*314000000X-
 NM1*85*2*THE LAURELS OF ATHENS - 0050912*****XX*1033405170-
 N3*70 COLUMBUS CIRCLE-
 N4*BOSTON*MA*457010000-
 REF*EI*260846316-
 HL*2*1*22*0-
 SBR*N*18-
 NM1*IL*1*ROSSITER*WESTON****MI*99999999-

N3*6272 PERRY RD-
 N4*BOSTON*MA*457010000-
 DMG*D8*20200619*M-
 REF*SY*454454545-
 NM1*ZD*2*MASS HEALTH-
 CLM*23216211156*7750***21:A:1**A*Y*Y-
 DTP*096*TM*2359-
 DTP*434*RD8*20230701-20230731-
 DTP*435*DT*202306011659-
 DTP*050*D8*20230804-
 CL1*3*4*30-
 CN1*02*5577.18**P-
 REF*9F*2316400487NASNF-
 REF*D9*23215IGC0107250-
 REF*EA*004144-
 HI*ABK:M25511-
 HI*APR:M25511*APR:M25512-
 HI*ABN:V892XXA-
 HI*ABF:M25512*ABF:S46011A*ABF:S46012A*ABF:F32A-
 HI*BH:01:D8:20230420-
 NM1*71*1*LLOYD*JOHN MD****XX*1740252923-
 PRV*AT*PXC*207Q000000X-
 REF*0B*35.041207-
 REF*G2*0389477-
 NM1*77*2*THE LAURELS OF ATHENS – 0050912-
 N3*70 COLUMBUS CIRCLE-
 N4*BOSTON*MA*457010000-
 SBR*S*18*0077186***6***HM -
 AMT*D*5577.18-
 NM1*IL*1*ROSSITER*WESTON****MI*9999999-
 N3*6272 PERRY RD-
 N4*BOSTON*MA*457010000-
 NM1*PR*2*MOLINA HEALTH CARE*****PI*0077186-
 DTP*573*D8*20230808-
 REF*F8*23216211156-
 SBR*P*18*L01733M001***1***CI- (*SBR06=1 COB*)
 AMT*D*0-
 NM1*IL*1*ROSSITER*MELISSA****MI*88888888-
 N3*6272 PERRY RD-
 N4*BOSTON*MA*457010000-
 NM1*PR*2*BLUE CROSS BLUE SHIELD*****PI*L01733M001-
 DTP*573*D8*20230808-
 LX*1-
 SV2*0101**3500*UN*14-
 DTP*472*D8*20230701-
 REF*6R*23216211156001-
 SVD*0077186*2902.62**0101*14-
 CAS*CO*45*597.38-
 DTP*573*D8*20230808-

LX*2-
 SV2*0101**3000*UN*12-
 DTP*472*D8*20230720-
 REF*6R*23216211156002-
 SVD*0077186*2487.96**0101*12-
 CAS*CO*45*512.04-
 DTP*573*D8*20230808-
 LX*3-
 SV2*0185**1250*UN*5-
 DTP*472*D8*20230715-
 REF*6R*23216211156003-
 SVD*0077186*186.6**0185*5-
 CAS*CO*45*1063.4-
 DTP*573*D8*20230808-
 SE*78*0021-

4. PACDR Institutional with COB Medicare

ST*837*0002*005010X299A1-
 BHT*0019*00*000001142*20050214*115101*RP-
 NM1*41*2*SPECIALISTS*****46*111111-
 PER*IC*SUE*TE*8005558888-
 NM1*40*2*MASSHEALTH*****46*DMA7384-
 HL*1**20*1-
 NM1*85*2*SPECIALISTS*****XX*0100000090-
 N3*5 MAP COURT-
 N4*BOSTON*MA*45701-
 REF*EI*890123456-
 REF*1G*110101-
 HL*2*1*22*0-
 SBR*S*18*MEDICARE*12****MB-
 NM1*IL*1*MEDYUM*WAYNE*M***MI*102200221B1-
 N3*1010 THOUSAND OAK LANE-
 N4*BOSTON*MA*45701-
 DMG*D8*19560110*M-
 NM1*PR*2*MEDICARE MASSHEALTH*****PI*10234-
 N3*5232 MAYNE AVENUE-
 N4*BOSTON*MA*45701-
 CLM*101KEN6055*120***11:B:1*Y*A*Y*Y*P-
 HI*BK:71516*BF:71906-
 NM1*DN*1*BRYHT*LEE*T-
 REF*1G*B01010-
 NM1*82*1*HENZES*JACK****XX*9090909090-
 PRV*PE*PXC*207X00000X-
 REF*G2*110102CCC-
 SBR*P*18*L01733M001***1***CI-
 AMT*D*80-
 AMT*A8*15-
 OI**Y*P**Y-

NM1*IL*1*MEDYUM*CAROL****MI*COM188-404777-
 N3*PO BOX 45-
 N4*BOSTON*MA*45701-
 NM1*PR*2*COMMERCE*****PI*59999-
 LX*1-
 SV1*HC:99203:25*120*UN*1***1:2-
 DTP*472*D8*20050119-
 SVD*59999*80*HC:99203:25***1-
 CAS*CO*42*25-
 CAS*PR*2*15-
 DTP*573*D8*20050128-
 SE*43*0002-

5. PACDR Institutional with Void

ST*837*0021*005010X299A1-
 BHT*0019*00*244579*20230315*1023*RP-
 NM1*41*2*AHC PLAN*****46*T0J23-
 PER*IC*IT GROUP*TE*3055552222*EX*231-
 NM1*40*2*MASSHEALTH*****46*DMA7384-
 HL*1**20*1-
 PRV*BI*PXC*203BI70100Y-
 NM1*85*2*ABC HOSPITAL*****XX*9876543210-
 N3*234 SEAWAY ST-
 N4*BOSTON*MA*331119998-
 REF*EI*587654321-
 HL*2*1*22*1-
 SBR*N-
 NM1*IL*1*SMITH*JANE****MI*JS00111223333-
 N3*891 GREENWAY ST-
 N4*BOSTON*MA*33111-
 DMG*D8*19430501*F-
 NM1*ZD*2*DATA RECEIVER-
 HL*3*2*23*0-
 PAT*19-
 NM1*QC*1*SMITH*TED****MI*JS00111224444-
 N3*236 N MAIN ST-
 N4*BOSTON*MA*33413-
 DMG*D8*19730501*M-
 CLM*26463774*100***13:A:8- (CLM05-03 = 8 (Void))
 DTP*434*RD8*20230204-20230204-
 CL1*1*9*03-
 HI*BK:0340-
 HI*PR:0340-
 HI*BF:V7389-
 NM1*71*1*JONES*BARNABY*****XX*1234567890-
 NM1*77*2*ABC HOSPITAL*****XX*9876543210-
 N3*234 SEAWAY ST-

N4*BOSTON*MA*331119998-
 SBR*P*01*2222-SJ***6***CI-
 AMT*D*75-
 NM1*IL*1*SMITH*JANE****MI*JS00111223333-
 N3*236 N MAIN ST-
 N4*BOSTON*MA*33413-
 NM1*PR*2*ABC PLAN*****PI*59999-
 DTP*573*D8*20230314-
 REF*F8*20121092600001-
 NM1*QC*1*SMITH*TED****MI*JS00111224444-
 N3*236 N MAIN ST-
 N4*MIAMI*PL*33413-
 LX*1-
 SV2*0510*HC:99213*100*UN*1-
 SVD*59999*75*HC:99213*0510*1-
 CAS*CO*45*25-
 DTP*573*D8*20230314-
 SE*51*0021-

6. PACDR Institutional with Replacement

ST*837*0021*005010X299A1-
 BHT*0019*00*244579*20230315*1023*RP-
 NM1*41*2*AHC PLAN*****46*T0J23-
 PER*IC*IT GROUP*TE*3055552222*EX*231-
 NM1*40*2*MASSHEALTH*****46*DMA7384-
 HL*1**20*1-
 PRV*BI*PXC*203B170100Y-
 NM1*85*2*ABC HOSPITAL*****XX*9876543210-
 N3*234 SEAWAY ST-
 N4*BOSTON*MA*331119998-
 REF*EI*587654321-
 HL*2*1*22*1-
 SBR*N-
 NM1*IL*1*SMITH*JANE****MI*JS00111223333-
 N3*891 GREENWAY ST-
 N4*BOSTON*MA*33111-
 DMG*D8*19430501*F-
 NM1*ZD*2*DATA RECEIVER-
 HL*3*2*23*0-
 PAT*19-
 NM1*QC*1*SMITH*TED****MI*JS00111224444-
 N3*236 N MAIN ST-
 N4*BOSTON*MA*33413-
 DMG*D8*19730501*M-
 CLM*26463774*100***13:A:7- (CLM05-03 = 7 (Replacement))
 DTP*434*RD8*20230204-20230204-

CL1*1*9*03-
HI*BK:0340-
HI*PR:0340-
HI*BF:V7389-
NM1*71*1*JONES*BARNABY****XX*1234567890-
NM1*77*2*ABC HOSPITAL*****XX*9876543210-
N3*234 SEAWAY ST-
N4*BOSTON*MA*331119998-
SBR*P*01*2222-SJ***6***CI-
AMT*D*75-
NM1*IL*1*SMITH*JANE****MI*JS00111223333-
N3*236 N MAIN ST-
N4*BOSTON*MA*33413-
NM1*PR*2*ABC PLAN*****PI*59999-
DTP*573*D8*20230314-
REF*F8*20121092600001-
NM1*QC*1*SMITH*TED****MI*JS00111224444-
N3*236 N MAIN ST-
N4*MIAMI*PL*33413-
LX*1-
SV2*0510*HC:99213*100*UN*1-
SVD*59999*75*HC:99213*0510*1-
CAS*CO*45*25-
DTP*573*D8*20230314-
SE*51*0021-

Appendix D. Frequently Asked Questions

This appendix contains a compilation of questions and answers. Typical questions would involve a content related to file submission, testing, and file processing issues, etc.

Please note: This information will be included in future versions of the Companion Guide.

Appendix E. Change Summary

This version of the MassHealth Companion Guide follows the CAQH CORE V5010 Companion Guide template. All references to the ASCX12 Implementation Guide are necessary to convey MassHealth's specific usage of the data elements to support electronic processing of the transaction with its Trading Partners, including codes and specific program instructions. The following changes have been made to this MassHealth Companion Guide.

TR3 Page #	Loop ID	Reference	Name	Codes	Notes/Comments
n/a	n/a	n/a	Section 3: Testing with SENDPro		Updated document contents to include additional details.
n/a	n/a	n/a	Section 7: MassHealth Specific Business Rules and Limitations		Updated document contents to include additional details.
95	2300	CLM05-03	Claim Frequency Code	1, 2, 3, 4, 5, 7, 8	Added notes including descriptions for codes to be populated in this field.
n/a	n/a	n/a	Appendix B: Business Scenarios		Updated with scenarios for which examples have been provided, identified in Section 7.
n/a	n/a	n/a	Appendix C: Transmission Examples		Updated with example EDI files based on scenarios identified in Section 7.

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