# MassHealth Standard Companion Guide837 Post-adjudicated Claims Data Reporting: Institutional

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

February 2025

## 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](http://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](http://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](http://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:** Updates 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 uses 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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## 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 healthcare 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 healthcare 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 healthcare 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, EOHHS 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
* 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, healthcare 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 healthcare 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](http://www.x12.org). Information about the X12 Licensing Program can be found at [x12.org/products/licensing-program](https://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 healthcare transactions.

## Getting Started

### WORKING WITH MASSHEALTH

Managed Care Entity (MCE) Trading Partners can exchange electronic healthcare 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](#_Trading_Partner_Agreements). 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.

## 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](#_Acknowledgements_and_Reports) 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.

## 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 8 a.m. ET Monday to 6 p.m. ET Friday. Files submitted after 6 p.m. ET Friday will undergo processing once SENDPro completes its maintenance window.

#### Transmission File Size

Transmission sizes are defined based on the following factors.

* Number of Segments/Records allowed by HIPAA Standards
* HIPAA-standard ST-SE envelope transaction size limitations (maximum of 5000 CLM segments)
* File size limitations (to be updated in 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 one 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, trading partners are sent a negative TA1 and/or negative 999 describing the validation error(s).

#### Production File-Naming Convention

For Inbound transactions, use the below naming convention.

*senderid\_transtype\_datetime\_env\_adj*

For example, a paid production 837I file submitted on January 4, 2024, at 2:30 p.m. EST, by a Trading Partner with a ten-digit PID/SL: of “110025617D” might be named the following.

*110025617d\_pacdri\_01042024143000\_prod\_pd*

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, by using an alpha suffix. This is only to be used for applicable pre-approved MassHealth defined projects and will be communicated directly to MCEs. In the case of this process, the naming convention is as follows.

*senderid\_transtype\_datetime\_env\_adj\_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 one of these methods 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.

### 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.

## 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 Technical Support Services

Days Available: Monday through Friday

Time Available: TBD

Email: TBD

Phone: TBD

Fax: TBD

*Please note: Support for Trading Partner Testing will be communicated by MassHealth prior to testing commencement. Further details will be provided in the next version of the Companion Guide.*

### 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](http://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](http://www.caqh.org/).

#### Council for Affordable Quality Healthcare (CAQH)

* CAQH is a nonprofit alliance of health plans and trade associations, working to simplify healthcare 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](http://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](http://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/](http://www.ncvhs.hhs.gov/).

#### National Council of Prescription Drug Programs (NCPDP)

* The NCPDP is the standards and codes development organization for pharmacy. See [www.ncpdp.org](http://www.ncpdp.org).

#### Washington Publishing Company (WPC)

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

## 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.caqh.org](http://www.caqh.org/).

| **TR3 Page #** | **Loop ID** | **Reference** | **Name** | **Codes** | **Notes/Comments** |
| --- | --- | --- | --- | --- | --- |
| C.3 | ---- | ISA | Interchange Control Header |  |  |
| C.4 | ----- | ISA01 | AuthorizationInformation Qualifier | 00 |  |
| C.4 | ----- | ISA02 | Authorization Information |  | 10 blank spaces |
| C.4 | ----- | ISA03 | Security InformationQualifier | 00 |  |
| C.4 | ----- | ISA04 | Security Information |  | 10 blank spaces |
| C.4 | ----- | ISA05 | Interchange IDQualifier | 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 IDQualifier | 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’sCode |  | 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 |

## MassHealth-Specific Business Rules and Limitations

This section describes MassHealth’s business rules, including for the following examples.

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

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

MassHealth requires Trading Partners to submit encounter files on a bi-weekly basis until a minimum of six months have passed since production implementation. At that time MassHealth will confirm the expected file submission frequency going forward (consult with MassHealth for the transition period guidelines). When constructing the file, submitters should order encounters by their adjudication dates. Encounters must be sorted chronologically by the adjudication date in the DTP segment – Claim Check or Remittance Date under loop 2330B, as failure to do so may lead to rejections due to void and adjustment sequencing within the same file. Note that duplicate claims submitted to MassHealth, in the same or in separate files, will result in rejections.

Trading Partners must make every effort to avoid submission of redundant or excessive transactions to MassHealth for processing. Encounter data transactions should be submitted to MassHealth only to convey services that have been provided directly to MassHealth members.

### ENCOUNTER SENDER/SUBMITTER IDS

For Encounter submissions, SENDPro supports the following three approaches.

* Parent organizations submitting on their own behalf
* Parent organizations submitting files on behalf of their affiliates
* Affiliates independently submitting 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 and assesses completeness and accuracy of critical data elements that must be included in every relevant encounter when applicable. MCEs must 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, Attending, Referring, and Rendering  |
| Detail and Total Medicaid Paid Amounts  | For all claim types  |
| Revenue Codes on all Detail lines  | For 837I claims  |
| Detail and Total Allowed Amounts  | For all claim types  |
| Revenue Charges on all Detail Lines  | For 837I claims  |
| Detail and Total Billed Amounts  | For all claim types  |
| Provider Taxonomy  | For Billing on all claim types except Pharmacy  |
| Medicare Paid, Deductible, Copay, and Coinsurance Amounts  | For all claim types  |
| Present and Valid NPI values  | For all provider types (Billing, Attending, Referring, Rendering, Operating, 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 and within IG standards. This is true for all provider loops that are utilized within the transaction, except for in the Service Facility Location loop (L2310E) where NM108 and NM109 remain situational in alignment with Implementation Guide standards and as specified in this MassHealth Companion Guide.

If you are an atypical provider and do not have an NPI, submit your Internal Provider ID (G2), Internal Provider Location ID (G2), and MassHealth provided PID/SL (G2 or LU), in the appropriate Reference Identification (REF) segment according to the rules below.

Do not submit Provider Social Security Numbers (SSNs) in your encounter data submission. Provider SSNs should never be submitted to MassHealth.

### 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 | **Internal Provider Number**MCEs must populate G2 with the Internal Provider number, Internal Provider Location ID, 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. Internal Provider Number<space>Internal Provider Location ID<space>PID/SLInclude PID/SL when known and in accordance with the CMS Medicaid and CHIP Managed Care Final Rule. Note that the maximum length for the entire REF02 field is 50 characters, including spaces.***Details are specified in each Provider ID data element in the Section 10 table.*** |
| LU | Location Number | **PID/SL** MCEs must populate LU with the MassHealth PID/SL when known.In the event the LU qualifier is not available within a segment, MCEs must populate G2 with the Internal Provider Number, the Internal Provider Location ID, and the MassHealth PID/SL (if known) as described above. Note that the maximum length for the entire REF02 field is 50 characters, including spaces.***Details are specified in each Provider ID data element in the Section 10 table.*** |
| 0B | State License Number | **State License Number**MCEs must populate the State License Number when known.Note that the maximum length for the entire REF02 field is 50 characters, including spaces.***Details are specified in each Provider ID data element in the Section 10 table.*** |

### 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. Note that failure to follow these instructions by attempting to void/adjust a claim with no original or by attempting to adjust the same original more than once will result in rejections.

**Void Transactions:** to be used for a full recovery

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

**Adjustment/Replacement Transactions:** to be used for a partial recovery

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

Follow guidance in Appendix B. Business Scenarios and Appendix C. Transmission Examples to construct adjustments and voids. This guidance reflects the daisy chain process and how to reference and tie back to a previous submission. SENDPro only expects to receive the PACDR 837 from MCEs and will return the corresponding 277DRA.

For adjustments (Frequency Code = 7), MassHealth has revised the original restriction of having same number of lines in the daisy chain and will now accept claims submitted (in daisy chain) with different number of lines.

Note that for Voids (Frequency code = 8), they should still have the same number of lines as the original/adjusted claims that they are voiding.

In SENDPro there would be two ways to process "Paid" and "Partially Denied" amendments

* Submit amendment as an adjustments with frequency as '7' (with correct daisy chain)
* Submit a void to the claim that is being corrected by the amendment claim and then submit an original claim with the amended information . (Note that amendments to denied claims are not accepted)

### COORDINATION OF BENEFITS (COB)

#### COB Claims

MCE trading partners should report all instances of COB scenarios received by providers in their encounter submissions in the 2320 loop. 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.

As a reminder, denied encounters and lines follow similar expectations as paid encounters with some exceptions. MassHealth requires that denied and partially denied claims conform to the rules in the implementation guide as well as this companion guide by submitting with complete and accurate data. Per situational and required field requirements, they should contain subscriber ID, adjudication date, as well as the appropriate CARC for that adjudication.

### CLAIM ADJUSTMENT REASON CODES (CARCs)

MassHealth/SENDPro will be using active standard Claim Adjustment Reason Codes (CARCs) from X12 External Codes Source 139. The assumption is that all MCEs follow industry and X12 validation standards and produce appropriate denials from their respective adjudication systems. MassHealth expects MCEs to adhere to the guidelines for populating CARCs referenced in the MassHealth CARC Memo.

### BUNDLED CLAIMS

Managed Care Entities must appropriately identify and populate all data elements on their encounter submissions when reporting bundled payments.

* Include the LX Assigned Number of the service line in which the service line was bundled in SVD06.
* Use “04” Bundled Pricing in HCP01 Pricing Methodology.

### RECORD INDICATORS IN PACDR FORMAT

Below is guidance for translating Record Indicators from the proprietary format to the PACDR-Professional standard.

#### Fee-for-Service (FFS)

* When the claim is fully Fee-for-Service (FFS), MCEs should use Contract Type = 4 at the header, Pricing Methodology per standard at the header and line level, and CARC per standard or MassHealth guidance at the header and line level.
* When the claim has a mix of FFS and other payment arrangements, MCEs should populate Contract Type = 9 at the header.
	+ When the claim has a mix of FFS and Primary Care Sub-Capitation (Sub-Cap) or Alternative Payment Methodology (APM) lines, MCEs should populate Pricing Methodology and CARC at the header and
	+ When the claim has a mix of FFS and payment arrangements other than Sub-Cap or APM, MCEs should populate Pricing Methodology and CARC at the header and line level as applicable in their system.
* All amounts will be submitted in their corresponding fields per X12 Implementation Guide (IG).

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Payment Arrangement** | **Multiple Arrangements****[[1]](#footnote-2)** | **Line Type** | **Contract Type** | **Pricing Methodology** | **CARC****[[2]](#footnote-3)** |
| FFS | No | Header | 4 | Per Standard | Per Standard or MassHealth Guidance |
| FFS | No | Line | N/A | Per Standard | Per Standard or MassHealth Guidance |
| FFS | Yes | Header | 9 | Per Standard or MassHealth Guidance | Per Standard or MassHealth Guidance |
| FFS | Yes | Line | N/A | Per Standard or MassHealth Guidance | Per Standard or MassHealth Guidance |

#### Per Diem

* When the claim is fully Per Diem, MCEs should use Contract Type = 2 at the header, Pricing Methodology per standard at the header and line level, and CARC per standard or MassHealth guidance at the header and line level.
* When the claim has a mix of Per Diem and other payment arrangements, MCEs should populate Contract Type = 9 at the header.
	+ When the claim has a mix of Per Diem and Sub-Cap or APM lines, MCEs should populate Pricing Methodology and CARC at the header and line level per Sub-Cap or APM policy.
	+ When the claim has a mix of Per Diem and payment arrangements other than Sub-Cap or APM, MCEs should populate Pricing Methodology and CARC at the header and line level as applicable in their system.
* All amounts will be submitted in their corresponding fields per X12 IG.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Payment Arrangement** | **Multiple Arrangements1** | **Line Type** | **Contract Type** | **Pricing Methodology** | **CARC2** |
| Per Diem | No | Header | 2 | Per Standard | Per Standard or MassHealth Guidance |
| Per Diem | No | Line | N/A | Per Standard | Per Standard or MassHealth Guidance |
| Per Diem | Yes | Header | 9 | Per Standard or MassHealth Guidance | Per Standard or MassHealth Guidance |
| Per Diem | Yes | Line | N/A | Per Standard or MassHealth Guidance | Per Standard or MassHealth Guidance |

#### Diagnosis Related Group (DRG)

* When the claim is fully DRG, MCEs should use Contract Type = 1 at the header, Pricing Methodology per standard at the header and line level, and CARC per standard or MassHealth guidance at the header and line level.
* When the claim has a mix of DRG and other payment arrangements, MCEs should populate Contract Type = 9 at the header.
	+ When the claim has a mix of DRG and Sub-Cap or APM lines, MCEs should populate Pricing Methodology and CARC at the header and line level per Sub-Cap or APM policy.
	+ When the claim has a mix of DRG and payment arrangements other than Sub-Cap or APM, MCEs should populate Pricing Methodology and CARC at the header and line Level as applicable in their system.
* All amounts will be submitted in their corresponding fields per X12 IG.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Payment Arrangement** | **Multiple Arrangements1** | **Line Type** | **Contract Type** | **Pricing Methodology** | **CARC2** |
| Diagnosis Related Group (DRG) | No | Header | 1 | Per Standard | Per Standard or MassHealth Guidance |
| Diagnosis Related Group (DRG) | No | Line | N/A | Per Standard | Per Standard or MassHealth Guidance |
| Diagnosis Related Group (DRG) | Yes | Header | 9 | Per Standard or MassHealth Guidance | Per Standard or MassHealth Guidance |
| Diagnosis Related Group (DRG) | Yes | Line | N/A | Per Standard or MassHealth Guidance | Per Standard or MassHealth Guidance |

#### Alternative Payment Methodology (APM)

Please note that MassHealth approval is required to implement an Alternative Payment Methodology (APM) arrangement.

The cost of approved APMs should be spread across relevant claims for the performance period in the “Amount Paid” field.

* When the claim is fully APM, MCEs should use Contract Type = 5 at the header, Pricing Methodology = 10 at the header and line level, and CARC = 24 at the header and line level.
* When the claim has a mix of APM and Sub-Cap lines only:
	+ MCEs should use Contract Type = 5 at the header.
	+ MCEs should use Pricing Methodology = 10 at the header and the appropriate Pricing Methodology for APM (Pricing Methodology = 10) or Sub-Cap (Pricing Methodology = 7) at the line level.
	+ MCEs should use CARC = 24 at the header and line level.
* When the claim has a mix of APM and at least one or more non-Sub-Cap lines:
	+ MCEs should populate Contract Type = 9 at the header.
	+ MCEs should populate Pricing Methodology = 10 at the header and the appropriate Pricing Methodology for APM (Pricing Methodology = 10), Sub-Cap (Pricing Methodology = 7), or other payment arrangement (per standard) at the line level.
	+ MCEs should populate CARC at the header per standard or MassHealth guidance. Populate the appropriate CARC for APM (CAS02 = 24), Sub-Cap (CAS02 = 24), or other payment arrangement (per standard or MassHealth guidance) at the line level.
* All amounts will be submitted in their corresponding fields per X12 IG.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Payment Arrangement** | **Multiple Arrangements1** | **Line Type** | **Contract Type** | **Pricing Methodology** | **CARC2** |
| Alternative Payment Methodology (APM) | No | Header | 5 | 10 | 24 |
| Alternative Payment Methodology (APM) | No | Line | N/A | 10 | 24 |
| Alternative Payment Methodology (APM) | Yes (with Sub-Cap only) | Header | 5 | 10 | 24 |
| Alternative Payment Methodology (APM) | Yes (with Sub-Cap only) | Line | N/A | Per Standard or MassHealth Guidance | 24 |
| Alternative Payment Methodology (APM) | Yes (with 1 or more non-Sub-Cap lines) | Header | 9 | 10 | Per Standard or MassHealth Guidance |
| Alternative Payment Methodology (APM) | Yes (with 1 or more non-Sub-Cap lines) | Line | N/A | Per Standard or MassHealth Guidance | Per Standard or MassHealth Guidance |

**Note:** Multiple CARCs can be submitted at both the header and line levels; however, if CARC 24 is indicated, it must be included on at least one of the lines.

#### Primary Care Sub-Capitation

Please note that Primary Care Sub-Capitation detail lines must meet the zero-pay criteria of the Primary Care Sub-Capitation program. MCEs must report $0 in “Amount Paid” and the value in “Amount Allowable” that is applicable in their systems for these detail lines.

* When the claim is fully Sub-Cap, the MCE should use Contract Type = 5 at the header, Pricing Methodology = 7 at the header and line level, and CARC = 24 at the header and line level.
* When the claim has a mix of Sub-Cap and APM lines only:
	+ MCEs should use Contract Type = 5 at the header.
	+ MCEs should use Pricing Methodology = 10 at the header and the appropriate Pricing Methodology for APM (Pricing Methodology = 10) or Sub-Cap (Pricing Methodology = 7) at the line level.
	+ MCEs should use CARC = 24 at the header and line level.
* When the claim has a mix of Sub-Cap and one or more non-APM lines:
	+ MCEs should populate Contract Type = 9 at the header.
	+ MCEs should populate Pricing Methodology = 10 at the header and the appropriate Pricing Methodology for Sub-Cap (Pricing Methodology = 7), APM (Pricing Methodology = 10), or other payment arrangement (per standard) at the line level.
	+ MCEs should populate CARC at the header per standard or MassHealth guidance. Populate the appropriate CARC for Sub-Cap (CAS02 = 24), APM (CAS02 = 24), or other payment arrangement (per standard or MassHealth guidance) at the line level.
* All amounts will be submitted in their corresponding fields per X12 IG.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Payment Arrangement** | **Multiple Arrangements**1 | **Line Type** | **Contract Type**2 | **Pricing Methodology**3 | **CARC**4 |
| Diagnosis Related Group (DRG) | No | Header | 5 | 7 | 24 |
| Diagnosis Related Group (DRG) | No | Line | N/A | 7 | 24 |
| Diagnosis Related Group (DRG) | Yes (with APM only) | Header | 5 | 10 | 24 |
| Diagnosis Related Group (DRG) | Yes (with APM only) | Line | N/A | Per MassHealth Guidance | 24 |
| Diagnosis Related Group (DRG) | Yes (with 1 or more non-APM lines) | Header | 9 | 10 | Per Standard or MassHealth Guidance |
| Diagnosis Related Group (DRG) | Yes (with 1 or more non-APM lines) | Line | N/A | Per Standard or MassHealth Guidance | Per Standard or MassHealth Guidance |

**Note:** Multiple CARCs can be submitted at both the header and line levels; however, if CARC 24 is indicated, it must be included on at least one of the lines.

### SERVICE CATEGORY CODE

Follow the guidance below for submitting the service category code.

1. Submit Service Category code based on the proprietary format tables listed below.
2. Service category is not needed on Dental and Pharmacy claims.
3. **For Professional claims**:
	1. Enter the service category at the line level only as follows (*do* ***not*** *enter NTE in loop 2300*):

**Loop**: 2400
**Segment**: NTE – LINE NOTE
**Data** **Element**: NTE01= ADD and enter service category value in **NTE02** for each line

1. **For Institutional claims**:
	1. Enter the service category information at the header level for each claim as follows:

**Loop**: 2300

**Segment**: NTE – CLAIM NOTE

**Data Element**: NTE01= UPI and enter service category value in NTE02

* 1. When the claim has multiple lines, enter up to 20 service categories (as applicable) separated by space and must be ordered by line number, where each service line is accurately associated with one service category
	2. If the claim has more than 20 lines, for each additional set of 20 lines, repeat the NTE – CLAIM NOTE segment and enter the information as mentioned above to cover the rest of the lines associated with the claim, which were not covered by the first set of 20, also separated by space and ordered by line number
		1. The maximum number of NTE segments repeat up to 10 times, which can accommodate service categories for up to 200 lines.
		2. Note: MassHealth is aware that some institutional claims can have over 200 lines and that MCEs will not be able to submit the service category beyond the 200 lines.

See Appendix B and C for an example.

#### Service Category Using the 4B Reporting Groups

| **Value** | **Description** |
| --- | --- |
| 1  | Capitated Physician Services  |
| 2  | Fee For Service Physician Services  |
| 3  | Behavioral Health – Inpatient Services  |
| 4  | Behavioral Health – Diversionary Services \*  |
| 5  | Behavioral Health – Emergency Services Program (ESP) Services  |
| 6  | Behavioral Health – Mental Health Outpatient Services \*  |
| 7  | Behavioral Health – Substance Abuse Outpatient Services \*  |
| 8  | Behavioral Health – Other Outpatient Services \*  |
| 9  | Facility- Medical/Surgical  |
| 10  | Facility- Pediatric/Sick Newborns  |
| 11  | Facility- Obstetrics  |
| 12  | Facility- Skilled Nursing Facility/Rehab  |
| 13  | Facility- Other Inpatient  |
| 14  | Facility- Emergency Room  |
| 15  | Facility- Ambulatory Care  |
| 16  | Prescription Drug  |
| 17  | Laboratory  |
| 18  | Radiology  |
| 19  | Home Health  |
| 20  | Durable Medical Equipment  |
| 21  | Emergency Transportation  |
| 22  | Therapies  |
| 23  | Other (Please use this for Vision and Dental claims)  |
| 24  | Other Alternative Care  |
| 25  | Mental Health and Substance Abuse Outpatient Services (\*MBHP Only)  |
| 26  | Outpatient Day Services (\*MBHP Only)  |
| 27  | Non-ESP Emergency Services (\*MBHP Only)  |
| 28  | Behavioral Health –Diversionary Services – 24-Hour  |
| 29  | Behavioral Health – Diversionary Services – Non-24-Hour  |
| 30  | Behavioral Health –Standard Outpatient Services  |
| 31  | Behavioral Health –Other Services  |
| 32  | Behavioral Health – Intensive Home or Community Based Outpatient Services for Youth *(Please note this new category is where all CBHI services, except youth mobile crisis intervention would be listed.  Youth mobile crisis intervention would be considered part of the Emergency Services Program Services.)* |

Note: Use these categories only for the claims with Dates of Service before 07/01/2010.

#### Service Category Using SCO and One Care reporting groups

| **Value** | **Description** | **SCO** | **One Care** |
| --- | --- | --- | --- |
| 301  | Hospital Inpatient  | Yes | Yes |
| 302  | Behavioral Health (BH) Hospital Inpatient  | Yes | Yes |
| 303  | Hospital Outpatient  | Yes | Yes |
| 304  | Behavioral Health (BH) Hospital Outpatient  | Yes | Yes |
| 305  | Professional  | Yes | Yes |
| 306 | Vision  | Yes | Yes |
| 307  | Dental  | Yes | Yes |
| 308  | Therapy  | Yes | Yes |
| 309  | Pharmacy/Drugs  | Yes | Yes |
| 309B  | Pharmacy/Drugs (non-Part D) GROSS  | Yes | Yes |
| 310  | Laboratory, Radiology, Testing  | Yes | Yes |
| 311  | Institutional Long-Term Care  | Yes | Yes |
| 314  | Transportation  | Yes | Yes |
| 315  | Medical Equipment  | Yes | Yes |
| 316  | Hospice  | Yes | Yes |
| 317  | Case Management  | Yes | Yes |
| 318  | Other Miscellaneous  | Yes | Yes |
| 320  | Personal Care Attendant (PCA)  | Yes | Yes |
| 325  | Home Health  | Yes | Yes |
| 330  | Adult Foster Care (Including GAFC)  | Yes | Yes |
| 335  | Adult Day Health  | Yes | Yes |
| 340  | Day Habilitation  | Yes | Yes |
| 345  | Frail Elder Waiver (FEW) Services  | Yes | No |
| 347  | All Other Community LTC  | Yes | Yes |
| 350  | ASAPs  | Yes | Yes |

## 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.

## 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) 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.

## 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 do the following.

* 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.
* 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 | 0B |  |
| 61 | 2010AA  | REF01 | Billing Provider Secondary ID Qualifier | G2 | Populate with the “Internal Provider Number<space>Internal Provider Location ID<space>PID/SL” (when known). If the PID/SL is unknown, use Internal Provider Number<space>Internal Provider Location ID only. |
| 63 | 2000B | HL04 | Hierarchical Child Code | 0 | Subscriber is always the patient in Medicaid. |
| 67 | 2010BA | NM102 | Entity Type | 1 | MassHealth expects the 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 Former claim number must be populated in L2330B REF\*BP when CLM05-03 = 7 or 8. |
| 98 | 2300 | DTP03 | Discharge Time Period |  | MassHealth expects this to be populated in all cases except when CL103 = 30 (still a patient). |
| 100 | 2300 | DTP02 | Admission Date Time Period Format Qualifier | DT |  |
| 100 | 2300 | DTP03 | Admission Date Time Period |  | Must be formatted as CCYYMMDDHHMM |
| 107 | 2300 | CN101 | Contract Type Code |  | Adhere to guidance in Section 7 for populating Contract Type Code in relation to Record Indicator. Use Contract Type 05 to report Medicaid Fee for Service Equivalent Amount when other code types are not applicable. |
| 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 = PaidR = Partially DeniedD = Denied |
| 114 | 2300 | REF01 | Payer Claim Control Qualifier | F8 |  |
| 132 | 2300 | HI01-1 | Principal Diagnosis | ABK | MassHealth expects Principal Diagnosis codes to be valid ICD10 codes whose description DOES NOT contain any of the following text: “in diseases classified elsewhere,” “in other diseases classified elsewhere,” “in diseases classified elsewhere”, “in other diseases classified elsewhere” |
| 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. MassHealth expects External Cause of Injury codes to be valid ICD10 codes that begin with one of the following: “V,” “W,” “X,” “Y” |
| 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.  |
| 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 | G2LU0B | Internal Provider Number<space>Internal Provider Location IDPID/SLState License Number |
| 260 | 2310B | NM109 | Operating Physician Primary Identifier |  |  |
| 261 | 2310B | REF01 | Operating Physician Secondary ID Qualifier | G2LU0B | Internal Provider Number<space>Internal Provider Location IDPID/SLState License Number |
| 265 | 2310C | NM109 | Other Operating Physician Primary Identifier |  |  |
| 266 | 2310C | REF01 | Other Operating Physician Secondary ID Qualifier | G2LU0B | Internal Provider Number<space>Internal Provider Location IDPID/SLState License Number |
| 270 | 2310D | NM109 | Rendering Provider ID |  |  |
| 271 | 2310D | REF01 | Rendering Provider Secondary ID Qualifier | G2LU0B | Internal Provider Number<space>Internal Provider Location IDPID/SLState License Number |
| 274 | 2310E | NM109 | Laboratory or Service Facility Primary Identifier |  | In accordance with the Implementation Guide, this field should be populated unless the Service Facility NPI is the same as the Billing Provider NPI.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 | G2LU0B | Internal Provider Number<space>Internal Provider Location IDPID/SLState License Number |
| 283 | 2310F | NM109 | Referring Provider ID |  |  |
| 284 | 2310F | REF01 | Referring Provider Secondary ID Qualifier | G20B | Populate with the “Internal Provider Number<space>Internal Provider Location ID <space>PID/SL” (when known). If the PID/SL is unknown, use Internal Provider Number<space>Internal Provider Location ID only. State License Number |
| 291 | 2320 | SBR09 | Claim Filing Indicator Code |  | Use MC when reporting MCE claim adjudication data.Use MA, MB, or OF for reporting Medicare.Use other designations as appropriate.  |
| 292 | 2320 | CAS02 | Claim Adjustment Reason Code |  | Adhere to guidance in Section 7 for populating CARCs. |
| 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. |
| 327 | 2330B | REF02 | Other Payer’s Adjusted Claim Control Number |  | Must be populated with the former claim number for all voids and adjustments. |
| 340 | 2400 | SV202-01 | Product/Service ID Qualifier | HC, HP | Allowable qualifiers in this field, when SV202 is populated |
| 354 | 2400 | HCP02 | Repriced Allowed Amount |  |  |
| 355 | 2400 | HCP09 | Product/Service ID Qualifier | HC, HP | Allowable qualifiers in this field |
| 356 | 2400 | HCP12 | Repriced Approved Service Unit Count |  |  |
| 368 | 2420A | NM109 | Operating Physician Identifier |  |  |
| 369 | 2420A | REF01 | Operating Physician Secondary ID Qualifier | G2LU0B | Internal Provider Number<space>Internal Provider Location IDPID/SLState License Number |
| 373 | 2420B | NM109 | Other Operating Physician Identifier |  |  |
| 374 | 2420B | REF01 | Other Operating Physician Secondary ID Qualifier | G2LU0B | Internal Provider Number<space>Internal Provider Location IDPID/SLState License Number |
| 378 | 2420C | NM109 | Rendering Provider ID |  |  |
| 379 | 2420C | REF01 | Rendering Provider Secondary ID Qualifier | G2LU0B | Internal Provider Number<space>Internal Provider Location IDPID/SLState License Number |
| 383 | 2420D | NM109 | Referring Provider ID |  |  |
| 384 | 2420D | REF01 | Referring Provider Secondary ID Qualifier | G20B | Populate with the “Internal Provider Number<space>Internal Provider Location ID <space>PID/SL” (when known). If the PID/SL is unknown, use Internal Provider Number<space>Internal Provider Location ID only. State License Number |
| 386 | 2430 | SVD03-01 | Product/Service ID Qualifier | HC, HP | Allowable qualifiers in this field, when SVD03 is populated |
| 391 | 2430 | CAS02 | Claim Adjustment Reason Code |  | Adhere to guidance in Section 7 for populating CARCs. |
| 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. MCEs have the option to submit PACDR files as described below.
	1. Parent submitting for themselves
	2. Parent submitting on behalf of their affiliate
	3. MCE submitting for themselves
2. PACDR Institutional containing a denied encounter at the line level
3. PACDR with COB payer
4. PACDR with Medicare COB
5. PACDR Institutional with Void
6. PACDR Institutional with replacement
7. PACDR Original, Adjustment, Subsequent Adjustment, and Void
8. PACDR Initial Fully Denied Encounter then Subsequently Fully Paid in MCE Claims System
9. PACDR Initial Fully Denied Encounter then Subsequently Partially Denied in MCE Claims System
10. PACDR Initial Partially Denied Encounter then Subsequently Fully Paid in MCE Claims System
11. Service Category Code in PACDR

### Appendix C. Transmission Examples

Below are examples of how MCEs should submit PACDR files as described in Appendix B. Note that these are snippets of EDI messages that are included to illustrate the respective scenarios as per MassHealth requirements; they are not intended to be fully formed EDI messages.

1. If **Parent**-Tufts Health Together TPID/PIDSL = 110088791A and their **Affiliate** is Tuft’s Health Together with CHA: TPID/PIDSL = 110088791E, it would look like the following.
2. 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

1. 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

1. 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

1. **PACDR Institutional containing a denied encounter at the line level**

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\*ABK:V723\*ABF:4660~

SBR\*P\*18\*G00786\*\*\*6\*\*\*CI~

CAS\*CO\*39\*110~ (Valid X12 CARC)

AMT\*D\*0~

LX\*1~

SV2\*0510\*HC:99396\*110\*UN\*1~

SVD\*PAYER\*0\*HC:99396\*0510\*1~

CAS\*CO\*39\*110~ (Valid X12 CARC)

DTP\*573\*D8\*20231103

**3. PACDR Institutional with COB payer**

ST\*837\*0021\*005010X299A1~

BHT\*0019\*00\*244579\*20230315\*1023\*RP~

NM1\*41\*2\*SUBMITTER\*\*\*\*\*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\*9999999~

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\*ABH:01:D8:20230420~

NM1\*71\*1\*LLOYD\*JOHN MD\*\*\*\*XX\*1740252923~

PRV\*AT\*PXC\*207Q00000X~

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\*\*\*MC ~

AMT\*D\*5577.18~

NM1\*IL\*1\*ROSSITER\*WESTON\*\*\*\*MI\*9999999~

N3\*6272 PERRY RD~

N4\*BOSTON\*MA\*457010000~

NM1\*PR\*2\*MCE\*\*\*\*\*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\*SUBMITTER\*\*\*\*\*46\*1111111~

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\*N\*18~

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~

DTP\*096\*TM\*2359~

DTP\*434\*RD8\*20230701-20230731~

DTP\*435\*DT\*202306011659~

DTP\*050\*D8\*20230804~

HI\*ABK:71516\*ABF: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\*S\*18\*0077186\*\*\*6\*\*\*MC ~

AMT\*D\*5577.18~

NM1\*IL\*1\*ROSSITER\*WESTON\*\*\*\*MI\*9999999~

N3\*6272 PERRY RD~

N4\*BOSTON\*MA\*457010000~

NM1\*PR\*2\* MCE\*\*\*\*\*PI\*0077186~

DTP\*573\*D8\*20230808~

REF\*F8\*23216211156~

SBR\*P\*18\*L01733M001\*\*\*1\*\*\*MB~

AMT\*D\*80~

AMT\*A8\*15~

NM1\*IL\*1\*MEDYUM\*CAROL\*\*\*\*MI\*COM188-404777~

N3\*PO BOX 45~

N4\*BOSTON\*MA\*45701~

NM1\*PR\*2\*MEDICAIRE\*\*\*\*\*PI\*L01733M001~

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~

1. **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\*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~

CLM\*26463774\*100\*\*\*13:A:**8**~ **(CLM05-03 = 8 (Void))**

DTP\*434\*RD8\*20230204-20230204~

CL1\*1\*9\*03~

HI\*ABK:0340~

HI\*APR:0340~

HI\*ABF: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\*T4~

REF\*Y~

REF\*F8\*26463774~

REF\*BP\*26487548~

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~

1. **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~

CLM\*26463774\*100\*\*\*13:A:**7**~ **(CLM05-03 = 7 (Replacement))**

DTP\*434\*RD8\*20230204-20230204~

CL1\*1\*9\*03~

HI\*ABK:0340~

HI\*APR:0340~

HI\*ABF: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\*T4~

REF\*Y~

REF\*F8\*26463774~

REF\*BP\*26487548~

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~

1. **PACDR Original, Adjustment, Subsequent Adjustment, and Void**

| **Provider to MCE** | **Value** | **Payer (MCE)** | **Value** | **Encounter From MCE to Medicaid** | **Value** | **SENDPro to MCE** | **Value** |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **Original Claim - 837** |  | **ERA - 835** |  | **PACDR** |  | **277DRA** |  |
| 2300 CLM05-3 (Frequency Code)  | 1 | 2100 CLP01 (Patient Control Number) | P1 | 2300 CLM05-3 (Frequency Code)  | 1 | 2200D TRN02 | C1 |
| 2300 CLM01 (Patient Control Number) | P1 | 2100 CLP07 (Payer Claim Control Number) | C1 | 2300 CLM01 (MCE Claim Number) | C1 | 2200D REF01 (Payer's Claim Number) | 1K |
|   |  | 2100 CLP09 (Frequency Code) | 1 | 2300 REF\*F8 (Payer Claim Control Number) | Not sent | 2200D REF02 | C1 |
|   |  |  |  | 2330B REF01 (Original Reference Number) | F8 |  |   |
|   |  |  |  | 2330B REF02 | C1 |  |   |
|   |  |  |  | 2330B REF01 |  |  |   |
|   |  |  |  | 2330B REF02 |  |  |   |
| **Adjustment** |  | **Adjusted ERA - 835** |  | **Adjusted PACDR** |  | **Adjusted 277DRA** |  |
| 2300 CLM05-3 (Frequency Code)  | 7 | 2100 CLP01 (Patient Control Number) | P2 | 2300 CLM05-3 (Frequency Code)  | 7 | 2200D TRN02 | C2 |
| 2300 CLM01 (Patient Control Number) | P2 | 2100 CLP07 (Payer Claim Control Number) | C2 | 2300 CLM01 (MCE Claim Number) | C2 | 2200D REF01 (Payer's Claim Number) | 1K |
| 2300 REF\*F8 (Payer Claim Control Number) | C1 | 2100 CLP09 (Frequency Code) | 7 | 2300 REF\*F8 (Payer Claim Control Number) | Not sent | 2200D REF02 | C2 |
|   |  |  |  | 2330B REF01 (Signal Code) | T4 |  |   |
|   |  |  |  | 2330B REF02 | Y |  |   |
|   |  |  |  | 2330B REF01 (Original Reference Number) | F8 |  |   |
|   |  |  |  | 2330B REF02 | C2 |  |   |
|   |  |  |  | 2330B REF01 (Adjustment Control Number) | BP |  |   |
|   |  |  |  | 2330B REF02 | C1 |  |   |
| **Subsequent Adjustment** |  | **Subsequent Adjusted ERA - 835** |  | **Subsequent Adjusted PACDR** |  | **Subsequent Adjusted 277DRA** |  |
| 2300 CLM05-3 (Frequency Code)  | 7 | 2100 CLP01 (Patient Control Number) | P3 | 2300 CLM05-3 (Frequency Code)  | 7 | 2200D TRN02 | C3 |
| 2300 CLM01 (Patient Control Number) | P3 | 2100 CLP07 (Payer Claim Control Number) | C3 | 2300 CLM01 (MCE Claim Number) | C3 | 2200D REF01 (Payer's Claim Number) | 1K |
| 2300 REF\*F8 (Payer Claim Control Number) | C2 | 2100 CLP09 (Frequency Code) | 7 | 2300 REF\*F8 (Payer Claim Control Number) | Not sent | 2200D REF02 | C3 |
|   |  |  |  | 2330B REF01 (Signal Code) | T4 |  |   |
|   |  |  |  | 2330B REF02 | Y |  |   |
|   |  |  |  | 2330B REF01 (Original Reference Number) | F8 |  |   |
|   |  |  |  | 2330B REF02 | C3 |  |   |
|   |  |  |  | 2330B REF01 (Adjustment Control Number) | BP |  |   |
|   |  |  |  | 2330B REF02 | C2 |  |   |
| **Second Subsequent Adjustment** |  | **Second Subsequent Adjusted ERA - 835** |  | **Second Subsequent Adjusted PACDR** |  | **Second Subsequent Adjusted 277DRA** |  |
| 2300 CLM05-3 (Frequency Code)  | 7 | 2100 CLP01 (Patient Control Number) | P4 | 2300 CLM05-3 (Frequency Code)  | 7 | 2200D TRN02 | C4 |
| 2300 CLM01 (Patient Control Number) | P4 | 2100 CLP07 (Payer Claim Control Number) | C4 | 2300 CLM01 (MCE Claim Number) | C4 | 2200D REF01 (Payer's Claim Number) | 1K |
| 2300 REF\*F8 (Payer Claim Control Number) | C3 | 2100 CLP09 (Frequency Code) | 7 | 2300 REF\*F8 (Payer Claim Control Number) | Not sent | 2200D REF02 | C4 |
|   |  |  |  | 2330B REF01 (Signal Code) | T4 |  |   |
|   |  |  |  | 2330B REF02 | Y |  |   |
|   |  |  |  | 2330B REF01 (Original Reference Number) | F8 |  |   |
|   |  |  |  | 2330B REF02 | C4 |  |   |
|   |  |  |  | 2330B REF01 (Adjustment Control Number) | BP |  |   |
|   |  |  |  | 2330B REF02 | C3 |  |   |
| **Subsequent Void** |  | **Subsequent Void ERA - 835** |  | **Subsequent Void PACDR** |  | **Subsequent Void 277DRA** |  |
| 2300 CLM05-3 (Frequency Code)  | 8 | 2100 CLP01 (Patient Control Number) | P5 | 2300 CLM05-3 (Frequency Code)  | 8 | 2200D TRN02 | C5 |
| 2300 CLM01 (Patient Control Number) | P5 | 2100 CLP07 (Payer Claim Control Number) | C5 | 2300 CLM01 (MCE Claim Number) | C5 | 2200D REF01 (Payer's Claim Number) | 1K |
| 2300 REF\*F8 (Payer Claim Control Number) | C4 | 2100 CLP09 (Frequency Code) | 8 | 2300 REF\*F8 (Payer Claim Control Number) | Not sent | 2200D REF02 | C5 |
|   |  |  |  | 2330B REF01 (Signal Code) | T4 |  |   |
|   |  |  |  | 2330B REF02 | Y |  |   |
|   |  |  |  | 2330B REF01 (Original Reference Number) | F8 |  |   |
|   |  |  |  | 2330B REF02 | C5 |  |   |
|   |  |  |  | 2330B REF01 (Adjustment Control Number) | BP |  |   |
|   |   |   |   | 2330B REF02 | C4 |   |   |

1. **PACDR Initial Fully Denied Encounter and then Subsequently Fully Paid in MCE Claims System**

Claims submitted as shown below would be accepted by MassHealth using either Scenario 1A or Scenario 1B.

| **Scenario 1A (Denied then Paid)** | **Value** | **SENDPro to MCE 277 DRA** | **Value** |
| --- | --- | --- | --- |
| **Initially Submitted DENIED Claim** |  |  |  |
| 2300 CLM05-3 (Frequency Code) | 1 | 2200D TRN02 | C1 |
| 2300 CLM01 (MCE Claim Number) | C1 | 2200D REF01 (Payer's Claim Number) | 1K |
| 2300 CN104 | D | 2200D REF02 | C1 |
| 2320 CAS | Populate valid X12 CARC - Send header CAS as applicable |  |  |
| 2300 REF\*F8 (Payer Claim Control Number) | Not sent |  |  |
| 2330B REF01 (Original Reference Number) | F8 |  |  |
| 2330B REF02 | C1 |  |  |
| 2330B REF01 |  |  |  |
| 2330B REF02 |  |  |  |
| 2420 CAS | Populate valid X12 CARC at line level |  |  |
| **PAID Claim Submitted as an Adjustment to the Above DENIED Claim** |  |  |  |
| 2300 CLM05-3 (Frequency Code)  | 7 | 2200D TRN02 | C2 |
| 2300 CLM01 (MCE Claim Number) | C2 | 2200D REF01 (Payer's Claim Number) | 1K |
| 2300 CN104  | P | 2200D REF02 | C2 |
| 2320 CAS | Populate valid X12 CARC - Send header CAS as applicable |  |  |
| 2300 REF\*F8 (Payer Claim Control Number) | Not sent |  |  |
| 2330B REF01 (Signal Code) | T4 |  |  |
| 2330B REF02 | Y |  |  |
| 2330B REF01 (Original Reference Number) | F8 |  |  |
| 2330B REF02 | C2 |  |  |
| 2330B REF01 (Adjustment Control Number) | BP |  |  |
| 2330B REF02 | C1 |  |  |
| 2420 CAS | Populate valid X12 CARC at line level |  |  |

| **Scenario 1B (Denied then Paid)** | **Value** | **SENDPro to MCE 277 DRA** | **Value** |
| --- | --- | --- | --- |
| **Initially Submitted DENIED Claim** |  |  |  |
| 2300 CLM05-3 (Frequency Code)  | 1 | 2200D TRN02 | C1 |
| 2300 CLM01 (MCE Claim Number) | C1 | 2200D REF01 (Payer's Claim Number) | 1K |
| 2300 CN104  | D | 2200D REF02 | C1 |
| 2320 CAS | Populate valid X12 CARC - Send header CAS as applicable |  |  |
| 2300 REF\*F8 (Payer Claim Control Number) | Not sent |  |  |
| 2330B REF01 (Original Reference Number) | F8 |  |  |
| 2330B REF02 | C1 |  |  |
| 2330B REF01 |  |  |  |
| 2330B REF02 |  |  |  |
| 2420 CAS | Populate valid X12 CARC at line level |  |  |
| **PAID Claim Submitted as an Original to the Above Claim** |  |  |  |
| 2300 CLM05-3 (Frequency Code)  | 1 | 2200D TRN02 | C2 |
| 2300 CLM01 (MCE Claim Number) | C2 | 2200D REF01 (Payer's Claim Number) | 1K |
| 2300 CN104  | P | 2200D REF02 | C2 |
| 2320 CAS | Populate valid X12 CARC - Send header CAS as applicable |  |  |
| 2300 REF\*F8 (Payer Claim Control Number) | Not sent |  |  |
| 2330B REF01 (Original Reference Number) | F8 |  |  |
| 2330B REF02 | C2 |  |  |
| 2330B REF01 |  |  |  |
| 2330B REF02 |  |  |  |
| 2420 CAS | Populate valid X12 CARC at line level |  |  |

1. **PACDR Initial Fully Denied Encounter then Subsequently Partially Denied in MCE Claims System**

Claims submitted as shown below would NOT be accepted by MassHealth Scenario 2A.

| **Scenario 2A (Denied then Partially Denied)**  | **Value** | **SENDPro to MCE 277 DRA** | **Value** |
| --- | --- | --- | --- |
| **Initially Submitted DENIED Claim** |  |  |  |
| 2300 CLM05-3 (Frequency Code)  | 1 | 2200D TRN02 | C5 |
| 2300 CLM01 (MCE Claim Number) | C5 | 2200D REF01 (Payer's Claim Number) | 1K |
| 2300 CN104  | D | 2200D REF02 | C5 |
| 2320 CAS | Populate valid X12 CARC - Send header CAS as applicable |  |  |
| 2300 REF\*F8 (Payer Claim Control Number) | Not sent |  |  |
| 2330B REF01 (Original Reference Number) | F8 |  |  |
| 2330B REF02 | C5 |  |  |
| 2330B REF01 |  |  |  |
| 2330B REF02 |  |  |  |
| 2420 CAS | Populate valid X12 CARC at line level |  |  |
| **PARTIALLY DENIED Claim Submitted as an Adjustment to the Above DENIED Claim – NOT ACCEPTED** |  |  |  |
| 2300 CLM05-3 (Frequency Code)  | 7 | 2200D TRN02 | C6 |
| 2300 CLM01 (MCE Claim Number) | C6 | 2200D REF01 (Payer's Claim Number) | 1K |
| 2300 CN104  | R | 2200D REF02 | C6 |
| 2320 CAS | Populate valid X12 CARC - Send header CAS as applicable |  |  |
| 2300 REF\*F8 (Payer Claim Control Number) | Not sent |  |  |
| 2330B REF01 (Signal Code) | T4 |  |  |
| 2330B REF02 | Y |  |  |
| 2330B REF01 (Original Reference Number) | F8 |  |  |
| 2330B REF02 | C6 |  |  |
| 2330B REF01 (Adjustment Control Number) | BP |  |  |
| 2330B REF02 | C5 |  |  |
| 2420 CAS | Populate appropriate line level CARC as per MH instruction |  |  |

Rather, they should be submitted as shown below in Scenario 2B.

| **Scenario 2B (Denied then Partially Denied)** | **Value** | **SENDPro to MCE 277 DRA** | **Value** |
| --- | --- | --- | --- |
| **Initially Submitted DENIED Claim** |  |  |  |
| 2300 CLM05-3 (Frequency Code)  | 1 | 2200D TRN02 | C5 |
| 2300 CLM01 (MCE Claim Number) | C5 | 2200D REF01 (Payer's Claim Number) | 1K |
| 2300 CN104  | D | 2200D REF02 | C5 |
| 2320 CAS | Populate valid X12 CARC - Send header CAS as applicable |  |  |
| 2300 REF\*F8 (Payer Claim Control Number) | Not sent |  |  |
| 2330B REF01 (Original Reference Number) | F8 |  |  |
| 2330B REF02 | C5 |  |  |
| 2330B REF01 |  |  |  |
| 2330B REF02 |  |  |  |
| 2420 CAS | Populate valid X12 CARC at line level |  |  |
| **PARTIALLY DENIED Claim Submitted as an Original to the Above Claim** |  |  |  |
| 2300 CLM05-3 (Frequency Code)  | 1 | 2200D TRN02 | C6 |
| 2300 CLM01 (MCE Claim Number) | C6 | 2200D REF01 (Payer's Claim Number) | 1K |
| 2300 CN104  | R | 2200D REF02 | C |
| 2320 CAS | Populate valid X12 CARC - Send header CAS as applicable |  |  |
| 2300 REF\*F8 (Payer Claim Control Number) | Not sent |  |  |
| 2330B REF01 (Original Reference Number) | F8 |  |  |
| 2330B REF02 | C6 |  |  |
| 2330B REF01 |  |  |  |
| 2330B REF02 |  |  |  |
| 2420 CAS | Populate appropriate line level CARC as per MH instruction |  |  |

1. **PACDR Initial Partially Denied Encounter then Subsequently Fully Paid in MCE Claims System**

Claims submitted as shown below would be accepted by MassHealth using either Scenario 3A or Scenario 3B.

| **Scenario 3A (Partially Denied then Paid)** | **Value** | **SENDPro to MCE 277 DRA** | **Value** |
| --- | --- | --- | --- |
| **Initially Submitted PARTIALLY DENIED Claim** |  |  |  |
| 2300 CLM05-3 (Frequency Code)  | 1 | 2200D TRN02 | C3 |
| 2300 CLM01 (MCE Claim Number) | C3 | 2200D REF01 (Payer's Claim Number) | 1K |
| 2300 CN104  | R | 2200D REF02 | C3 |
| 2320 CAS | Populate valid X12 CARC - Send header CAS as applicable |  |  |
| 2300 REF\*F8 (Payer Claim Control Number) | Not sent |  |  |
| 2330B REF01 (Original Reference Number) | F8 |  |  |
| 2330B REF02 | C3 |  |  |
| 2330B REF01 |  |  |  |
| 2330B REF02 |  |  |  |
| 2420 CAS | Populate appropriate line level CARC as per MH instruction |  |  |
| **PAID Claim Submitted as an Adjustment to the Above PARTIALLY DENIED Claim** |  |  |  |
| 2300 CLM05-3 (Frequency Code)  | 7 | 2200D TRN02 | C4 |
| 2300 CLM01 (MCE Claim Number) | C4 | 2200D REF01 (Payer's Claim Number) | 1K |
| 2300 CN104  | P | 2200D REF02 | C4 |
| 2320 CAS | Populate valid X12 CARC - Send header CAS as applicable |  |  |
| 2300 REF\*F8 (Payer Claim Control Number) | Not sent |  |  |
| 2330B REF01 (Signal Code) | T4 |  |  |
| 2330B REF02 | Y |  |  |
| 2330B REF01 (Original Reference Number) | F8 |  |  |
| 2330B REF02 | C4 |  |  |
| 2330B REF01 (Adjustment Control Number) | BP |  |  |
| 2330B REF02 | C3 |  |  |
| 2420 CAS | Populate valid X12 CARC at line level |  |  |

| **Scenario 3B (Partially Denied then Paid)** | **Value** | **SENDPro to MCE 277 DRA** | **Value** |
| --- | --- | --- | --- |
| **Initially Submitted PARTIALLY DENIED Claim** |  |  |  |
| 2300 CLM05-3 (Frequency Code)  | 1 | 2200D TRN02 | C3 |
| 2300 CLM01 (MCE Claim Number) | C3 | 2200D REF01 (Payer's Claim Number) | 1K |
| 2300 CN104  | R | 2200D REF02 | C3 |
| 2320 CAS | Populate valid X12 CARC - Send header CAS as applicable |  |  |
| 2300 REF\*F8 (Payer Claim Control Number) | Not sent |  |  |
| 2330B REF01 (Original Reference Number) | F8 |  |  |
| 2330B REF02 | C3 |  |  |
| 2330B REF01 |  |  |  |
| 2330B REF02 |  |  |  |
| 2420 CAS | Populate appropriate line level CARC as per MH instruction |  |  |
| **PAID Claim Submitted as a Void to the Above Claim** |  |  |  |
| 2300 CLM05-3 (Frequency Code)  | 8 | 2200D TRN02 | C4 |
| 2300 CLM01 (MCE Claim Number) | C4 | 2200D REF01 (Payer's Claim Number) | 1K |
| 2300 CN104  | R | 2200D REF02 | C4 |
| 2320 CAS | Populate valid X12 CARC - Send header CAS as applicable |  |  |
| 2300 REF\*F8 (Payer Claim Control Number) | Not sent |  |  |
| 2330B REF01 (Signal Code) | T4 |  |  |
| 2330B REF02 | Y |  |  |
| 2330B REF01 (Original Reference Number) | F8 |  |  |
| 2330B REF02 | C4 |  |  |
| 2330B REF01 (Adjustment Control Number) | BP |  |  |
| 2330B REF02 | C3 |  |  |
| 2420 CAS | Populate appropriate line level CARC as per MH instruction |  |  |
| **PAID Claim Submitted as an Original to the Above Claim** |  |  |  |
| 2300 CLM05-3 (Frequency Code)  | 1 | 2200D TRN02 | C7 |
| 2300 CLM01 (MCE Claim Number) | C7 | 2200D REF01 (Payer's Claim Number) | 1K |
| 2300 CN104  | P | 2200D REF02 | C7 |
| 2320 CAS | Populate valid X12 CARC - Send header CAS as applicable |  |  |
| 2300 REF\*F8 (Payer Claim Control Number) | Not sent |  |  |
| 2330B REF01 (Original Reference Number) | F8 |  |  |
| 2330B REF02 | C7 |  |  |
| 2330B REF01 |  |  |  |
| 2330B REF02 |  |  |  |
| 2420 CAS | Populate valid X12 CARC at line level |  |  |

1. **Service Category Code in PACDR**

Example of a claim with 22 lines:

NTE01=UPI NTE02=318 318 318 318 318 318 318 318 318 318 318 318 318 315 310 315 315 310 310 310

NTE01=UPI NTE02=310 303

The example above will be read by SENDPro as:

| **Claim Line Number** | **Service Category** |
| --- | --- |
| 1 | 318 |
| 2 | 318 |
| 3 | 318 |
| 4 | 318 |
| 5 | 318 |
| 6 | 318 |
| 7 | 318 |
| 8 | 318 |
| 9 | 318 |
| 10 | 318 |
| 11 | 318 |
| 12 | 318 |
| 13 | 318 |
| 14 | 315 |
| 15 | 310 |
| 16 | 315 |
| 17 | 315 |
| 18 | 310 |
| 19 | 310 |
| 20 | 310 |
| 21 | 310 |
| 22 | 303 |

### Appendix D. Frequently Asked Questions

This appendix contains a compilation of questions and answers. Typical questions would involve 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.

| **Date** | **Page Number** |  **Section** | **Notes/Comments** |
| --- | --- | --- | --- |
| April 2024 | 9  | Section 3: Testing with SENDPro  | Updated document contents to include additional details.  |
| April 2024 | 17  | Section 7: MassHealth Specific Business Rules and Limitations  | Updated document contents to include additional details.  |
| April 2024 | 27  | Section 10: Transaction-Specific Information | Added notes and descriptions for codes to be populated in CLM05-03.  |
| April 2024 | App-2  | Appendix B: Business Scenarios  | Updated with scenarios for which examples have been provided, identified in Section 7.  |
| April 2024 | App-3  | Appendix C: Transmission Examples  | Updated with example EDI files based on scenarios identified in Section 7.  |
| November 2024 | 12 | Section 4: Connectivity with SENDPro/Communications | Updated file naming convention and example. |
| November 2024 | 17 | Section 7: MassHealth Specific Business Rules and Limitations | Updated submission frequency and file construction guidelines. |
| November 2024 | 18 | Section 7: MassHealth Specific Business Rules and Limitations | Updated TMSIS providers. |
| November 2024 | 18-19 | Section 7: MassHealth Specific Business Rules and Limitations | Updated Provider ID guidelines. |
| November 2024 | 19-20 | Section 7: MassHealth Specific Business Rules and Limitations | Updated guidance on voids and adjustments. |
| November 2024 | 20 | Section 7: MassHealth Specific Business Rules and Limitations | Updated guidance for denied claims submissions. |
| November 2024 | 21 | Section 7: MassHealth Specific Business Rules and Limitations | Updated guidance for bundled claims submissions. |
| November 2024 | 25-31 | Section 10: Transaction-Specific Information | Updated guidance for populating Provider IDs in segments 2010AA, 2310A, 2310B, 2310C, 2310D, 2420A, 2420B, 2420C, 2420D, 2420E, and 2420F |
| November 2024 | 26 and 30 | Section 10: Transaction-Specific Information | Updated guidance for populating former claim number based on frequency in CLM05-03. |
| November 2024 | 26 | Section 10: Transaction-Specific Information | Updated guidance for Discharge Time Period. |
| November 2024 | 27 | Section 10: Transaction-Specific Information | Updated format for Admission Date Time Period format. |
| November 2024 | 29 | Section 10: Transaction-Specific Information | Updated guidance for Laboratory or Service Facility Primary Identifier. |
| November 2024 | 30 | Section 10: Transaction-Specific Information | Updated guidance for use of claim filing indicator. |
| November 2024 | 30 and 32 | Section 10: Transaction-Specific Information | Updated allowable qualifiers for Product/Service ID. |
| November 2024 | App-3–6 | Appendix C: Transmission Examples | Updated example EDI. |
| February 2025 | 18–20 | Section 7: MassHealth Specific Business Rules and Limitations | Updated guidance for submission of voids and adjustments. |
| February 2025 | 20 | Section 7: MassHealth Specific Business Rules and Limitations | Added guidance for population of Claim Adjustment Reason Codes. |
| February 2025 | 20–24 | Section 7: MassHealth Specific Business Rules and Limitations | Added guidance for population of Record Indicators. |
| February 2025 | 24–26 | Section 7: MassHealth Specific Business Rules and Limitations | Added guidance for population of Service Category Codes. |
| February 2025 | 52 | Section 10: Transaction-Specific Information | Updated guidance for diagnosis segments HI\*ABK and HI\*ABN. |
| February 2025 | 35 and 37 | Section 10: Transaction-Specific Information | Updated guidance for population of CARCs in CAS02. |
| February 2025 | App-2 | Appendix B: Business Scenarios  | Added examples for submission of voids and adjustments and examples for population of service category code. |
| February 2025 | App-9–17 | Appendix C: Transmission Examples | Added examples for submission of voids and adjustments. |

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1. “Multiple arrangements” refers to a claim that contains lines representing more than one payment arrangement. [↑](#footnote-ref-2)
2. See <https://x12.org/codes/claim-adjustment-reason-codes> for full list of CARC (CAS02) values. [↑](#footnote-ref-3)