

## STATE DATA RESOURCE CENTER: PROCESS INSTRUCTIONS AND DIAGRAMS FOR DATA REQUESTS

This guide contains process instructions and diagrams that summarize state Medicaid agency request processes for Medicare data.

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#### PROCESS DIAGRAMS

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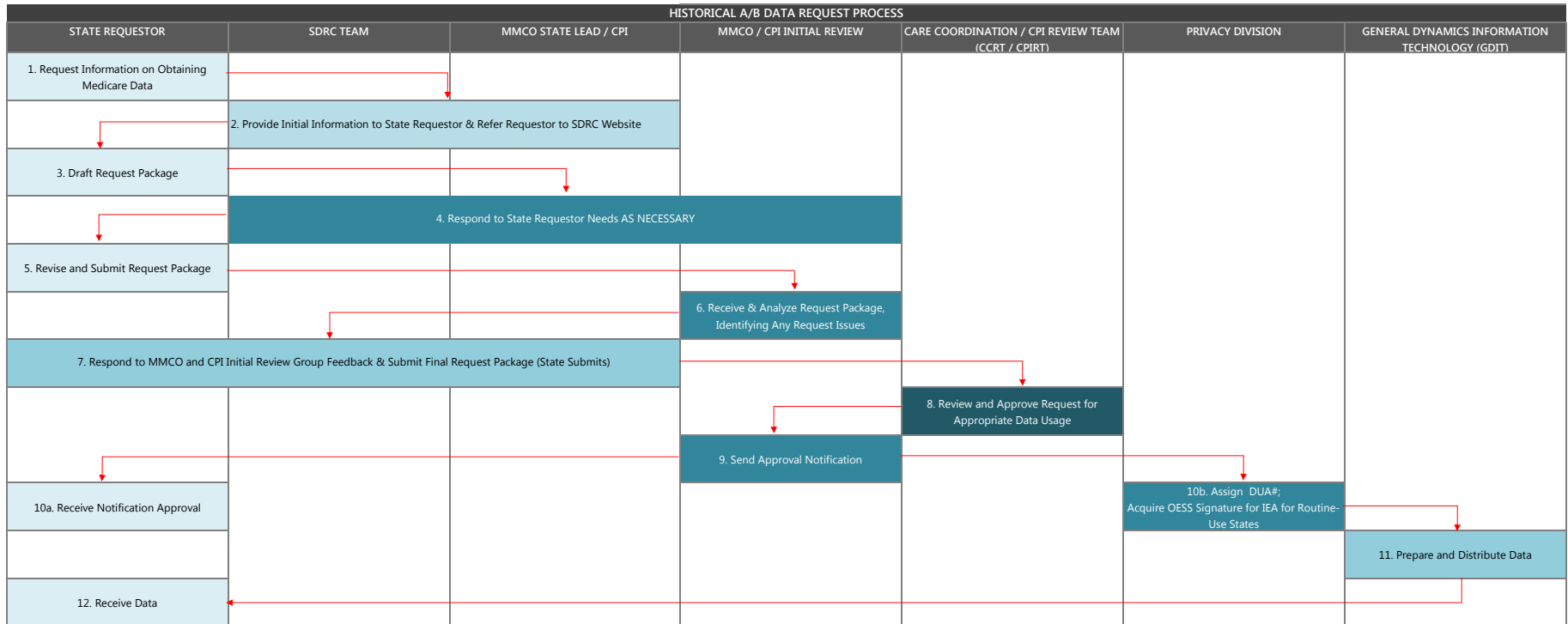
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## Historical Parts A/B Data Request Process

State Medicaid Agencies can request and obtain historical Parts A&B data according to the following process.

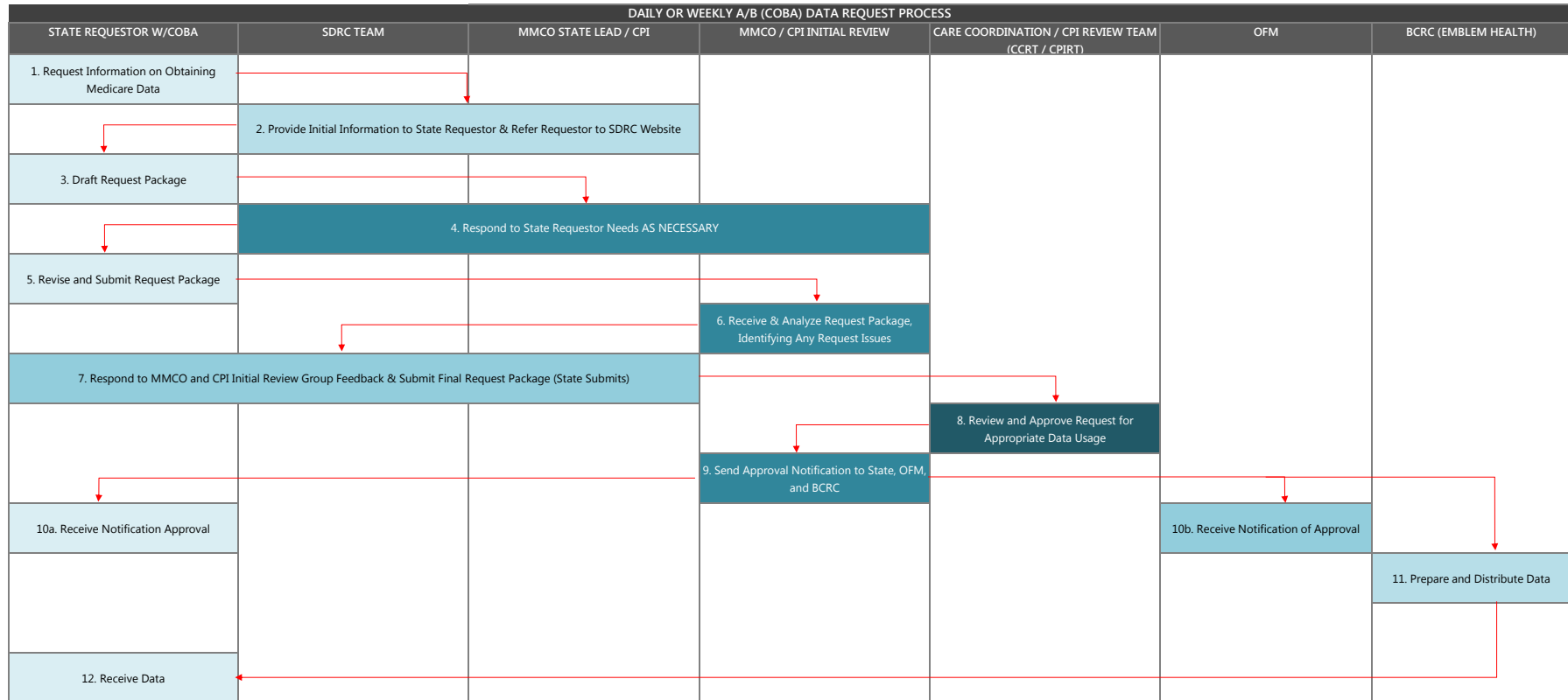
1. State Requestor requests information on obtaining Medicare data.
2. SDRC Support Team and MMCO State Lead and/or CPI (CMS) provide initial information to the State Requestor and refer the Requestor to the SDRC website.
3. State Requestor drafts a historical Parts A&B data request package.
4. SDRC Support Team and CMS respond to State Requestor needs as necessary.
5. State Requestor revises data request package and submits it to CMS.
6. MMCO and/or CPI Initial Review Groups complete preliminary review of the package identifying any request issues.
7. State Requestor, SDRC Support Team, and CMS review feedback and submit final request package to the Care Coordination and/or CPI Review Teams (CCRT/CPIRT).
8. (CCRT / CPIRT) review and approve request for appropriate data usage and send final approval notifications to MMCO and CPI.
9. CMS sends approval notification to State Requestor and CMS Privacy Division.
10. [See two sub-steps below]
  - a. State Requestor receives approval notification.
  - b. CMS Privacy Division assigns DUA number and acquires OESS signature for IEA for States.
11. GDIT prepares and distributes data to State Requestor.
12. State Requestor receives requested data.



## Daily or Weekly Parts A/B (COBA) Data Request Process

State Medicaid Agencies with CMS Coordination of Benefits Agreements (COBAs) can request and obtain daily or weekly Parts A&B data feeds according to the following process.

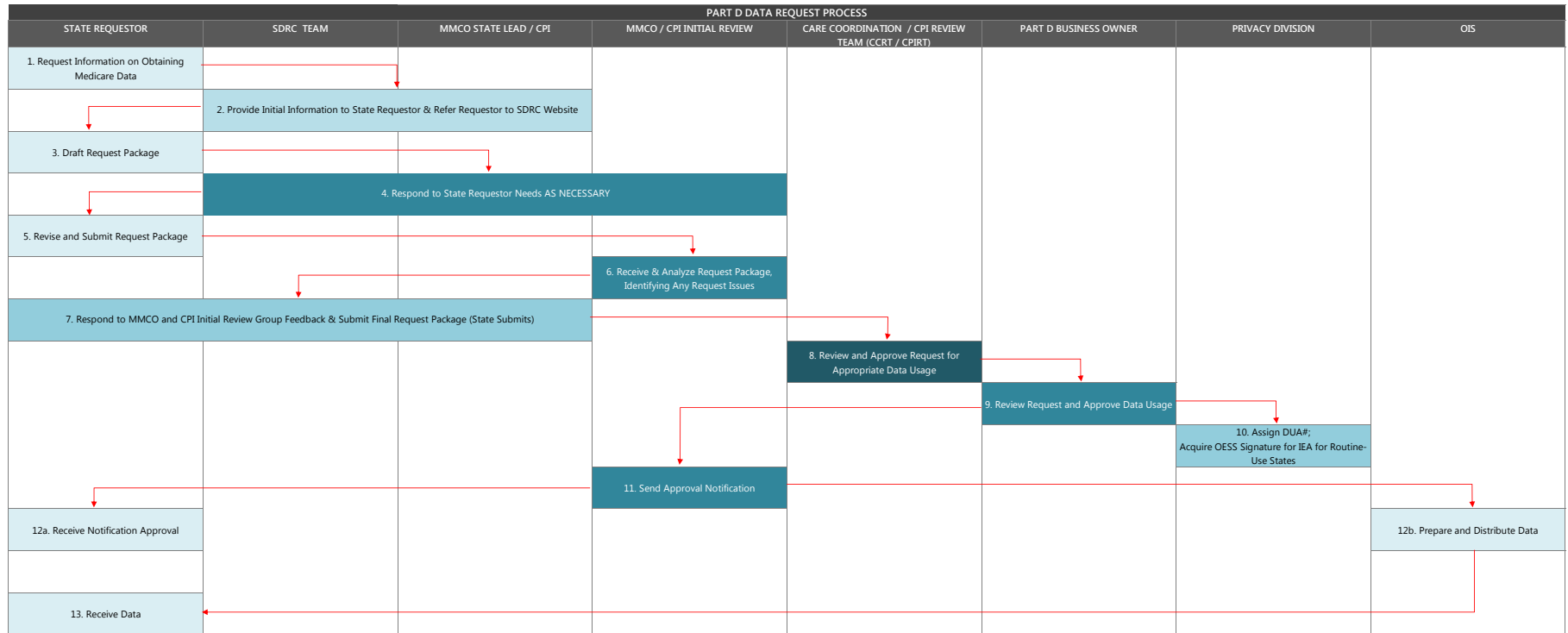
1. State Requestor requests information on obtaining Medicare data.
2. SDRC Support Team and MMCO State Lead and/or CPI (CMS) provide initial information to the State Requestor and refer the Requestor to the SDRC website.
3. State Requestor drafts a daily or weekly Parts A&B (COBA) data request package.
4. SDRC Support Team and CMS respond to State Requestor needs as necessary.
5. State Requestor revises data request package and submits it to CMS.
6. MMCO and/or CPI Initial Review Groups complete preliminary reviews of the package identifying any request issues.
7. State Requestor, SDRC Support Team, and CMS review feedback and submit final request package to the Care Coordination and/or CPI Review Teams (CCRT/CPIRT).
8. (CCRT / CPIRT) review and approve request for appropriate data usage.
9. CMS sends approval notification to State, OFM, and BCRC.
10. [See two sub-steps below]
  - a. State Requestor receives approval notification.
  - b. OFM receives notification of approval
11. BCRC prepares and distributes data.
12. State Requestor receives requested data.



## Part D Data Request Process

State Medicaid Agencies can request and obtain Part D data according to the following process.

1. State Requestor requests information on obtaining Medicare data.
2. SDRC Support Team and MMCO State Lead and/or CPI (CMS) provide initial information to the State Requestor and refer the Requestor to the SDRC website.
3. State Requestor drafts a Part D data request package.
4. SDRC Support Team and CMS respond to State Requestor needs as necessary.
5. State Requestor revises data request package and submits it to CMS.
6. MMCO and/or CPI Initial Review Groups complete preliminary reviews of package identifying any request issues.
7. State Requestor, SDRC Support Team, and CMS review feedback and submit final request package to the Care Coordination and/or CPI Review Teams (CCRT/CPIRT).
8. (CCRT / CPIRT) review and approve request for appropriate data usage.
9. Part D Business Owner reviews request and provides final data use approval.
10. CMS Privacy Division assigns DUA number and acquires OESS signature for IEA for States.
11. CMS Privacy Division notifies MMCO and CPI of final approval.
12. [See two sub-steps below]
  - a. MMCO / CPI sends approval notification to State Requestor.
  - b. OIS prepares and distributes data.
13. State Requestor receives requested data.



## Assessments Data Request Process

State Medicaid Agencies can request and obtain Assessments data according to the following process.

1. State Requestor requests information on obtaining Medicare data.
2. SDRC Support Team and MMCO State Lead and/or CPI (CMS) provide initial information to the State Requestor and refer the Requestor to the SDRC website.
3. State Requestor drafts an Assessments data request package.
4. SDRC Support Team and CMS respond to State Requestor needs as necessary.
5. State Requestor revises data request package and submits it to CMS.
6. MMCO and/or CPI Initial Review Groups complete preliminary reviews of the package identifying any request issues.
7. State Requestor, SDRC Support Team, and CMS review feedback and submit final request package to the Care Coordination and/or CPI Review Teams (CCRT/CPIRT).
8. (CCRT / CPIRT) review and approve request for appropriate data usage.
9. Assessments Business Owner reviews request and provides final data use approval.
10. CMS Privacy Division assigns DUA number and acquires OESS signature for IEA for States.
11. CMS Privacy Division notifies MMCO and CPI of final approval.
12. [See two sub-steps below]
  - a. MMCO / CPI send approval notification to State Requestor.
  - b. GDIT prepares and distributes data.
13. State Requestor receives requested data.



