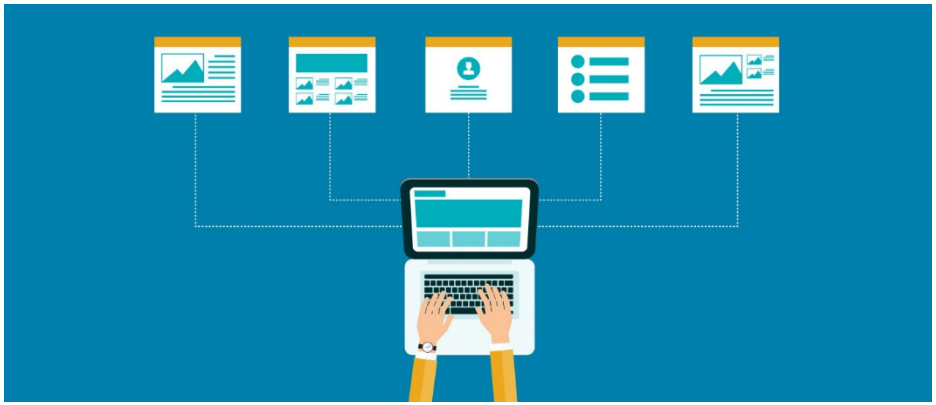
CENTERS FOR MEDICARE & MEDICAID SERVICES
OFFICE OF INFORMATION TECHNOLOGY

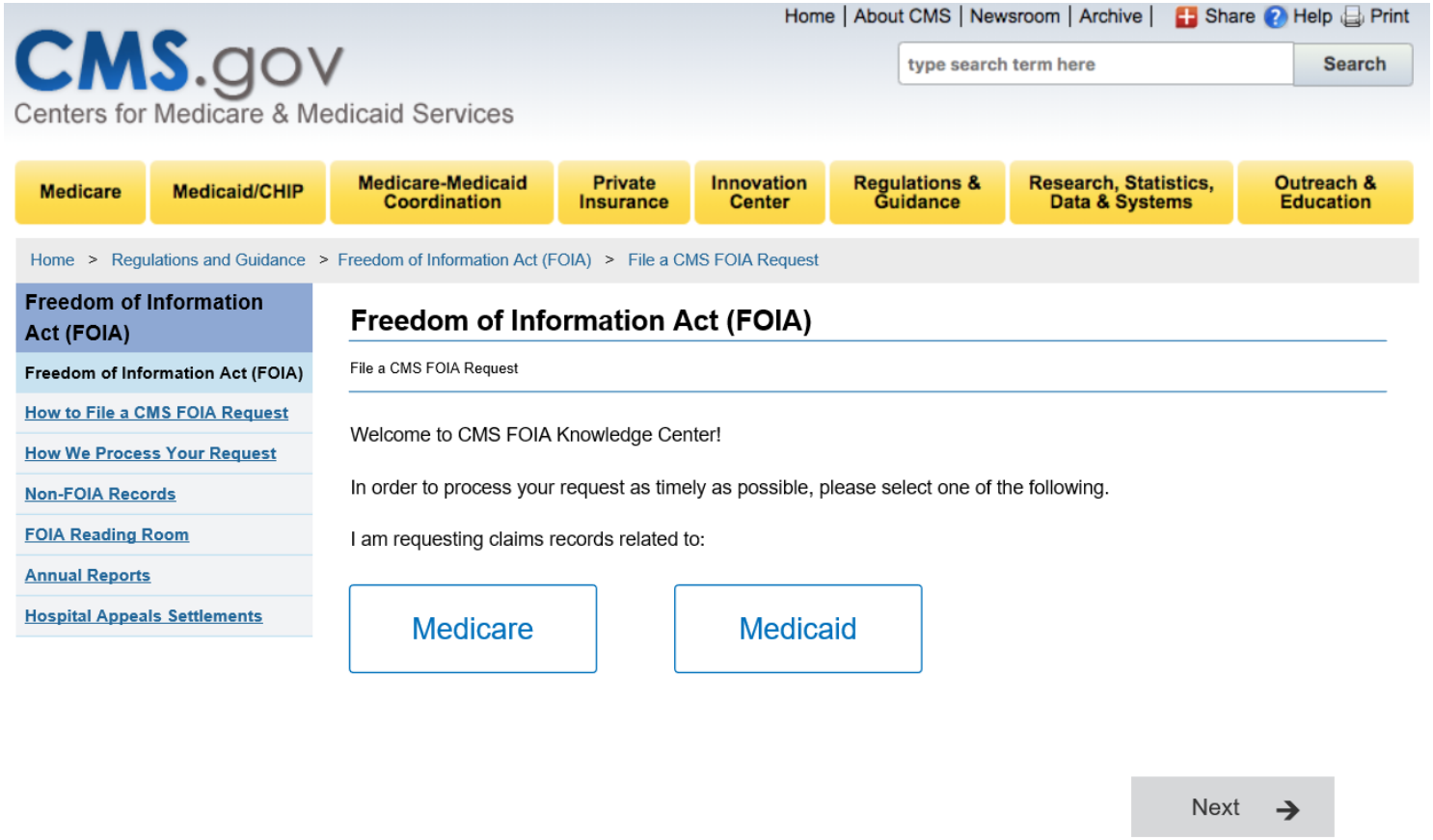
CMS/OSORA FOIA Portal Project



Screenshots for PRA Submission

FOIA Intake Portal - 1

Prior to entering the FOIA portal to request claims data, CMS wants to ensure that the user is requesting Medicare claims and not Medicaid claims. If the user selects Medicaid, they will be directed elsewhere (see Appendix A – Medicaid claims request redirects).



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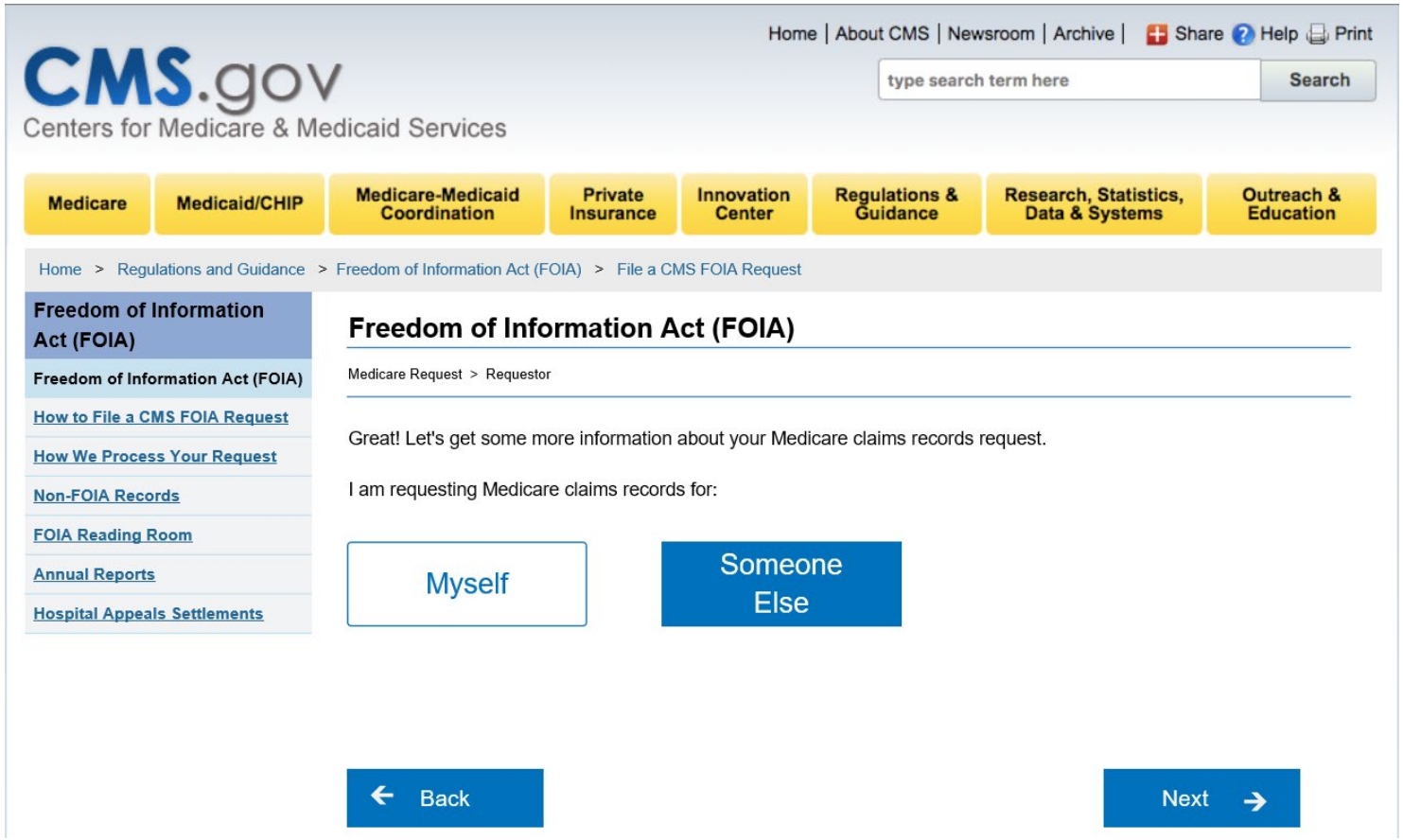
FOIA Intake Portal - 2

Prior to entering the FOIA portal to request claims data, CMS wants to determine if the user is requesting data for themselves. If yes, they would be asked additional questions to determine if there are more efficient and faster methods to obtain their data, like using Blue Button. (see Appendix B – person with Medicare redirects).



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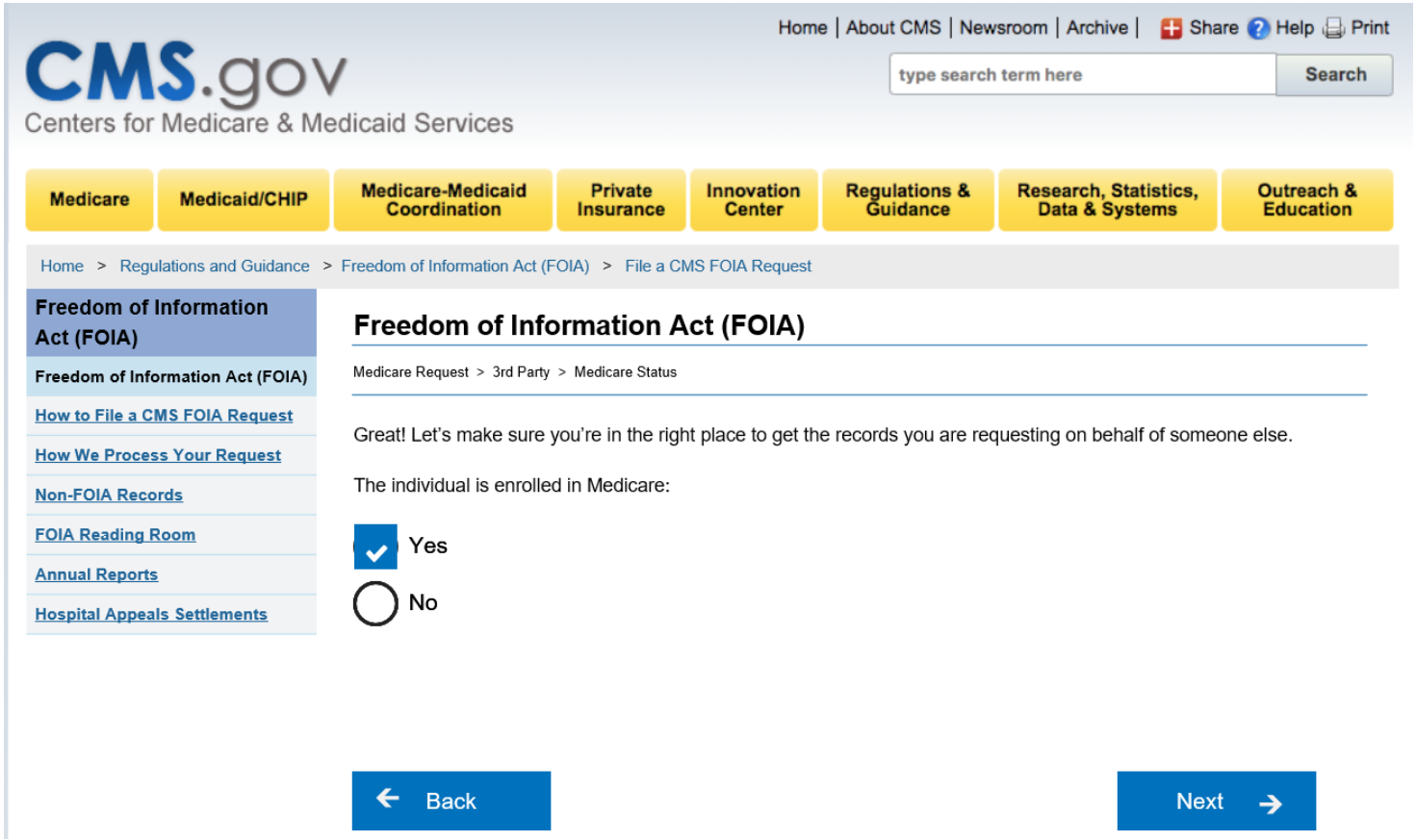
FOIA Intake Portal - 3

Prior to entering the FOIA portal to request claims data, CMS is re-verifying that the individual is actually enrolled in Medicare. See Appendix C for not enrolled redirects.



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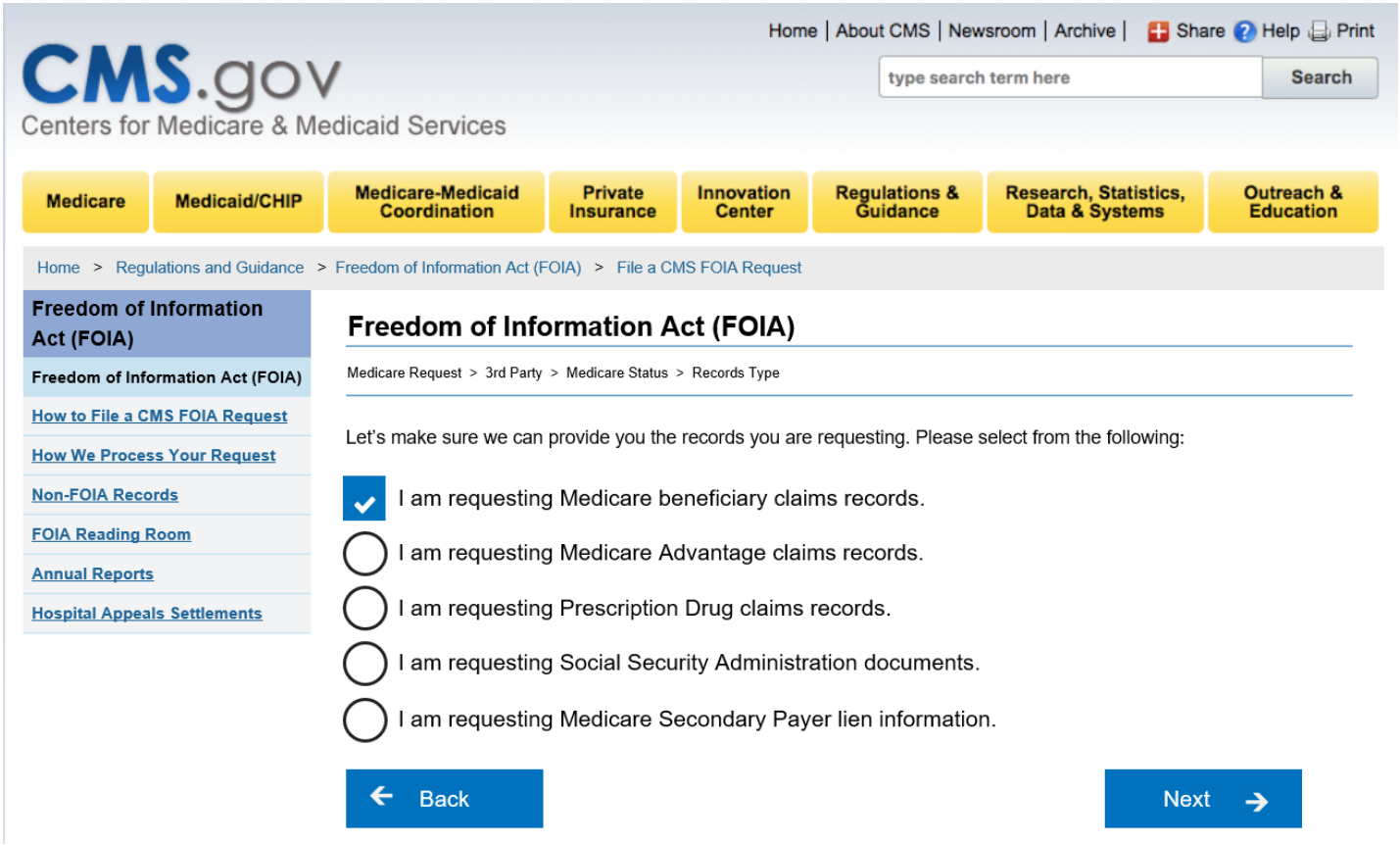
FOIA Intake Portal - 4

Finally, prior to entering the FOIA portal to request claims data, CMS wants to ensure it is only fee for service claims data, and not other types of Medicare data which CMS does not store. (see Appendix D – non FFS claims data redirects).



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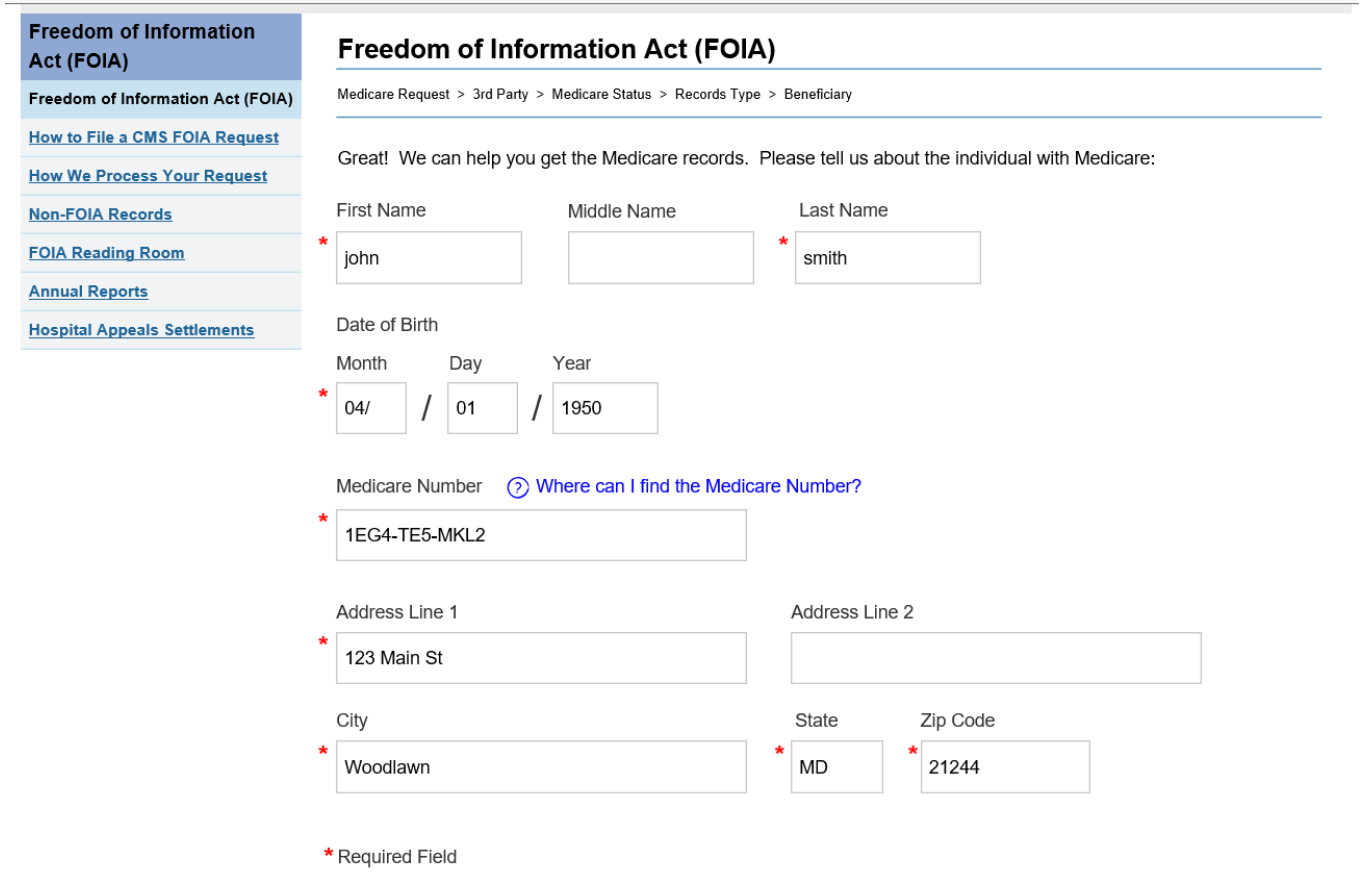
FOIA Intake Portal – 5

Now that all of the assurances and redirects have been established, it is time to collect the information about the FOIA case! The first step (Part A) is to obtain information about the person with Medicare, including their Medicare number (only the new MBI format will be accepted).



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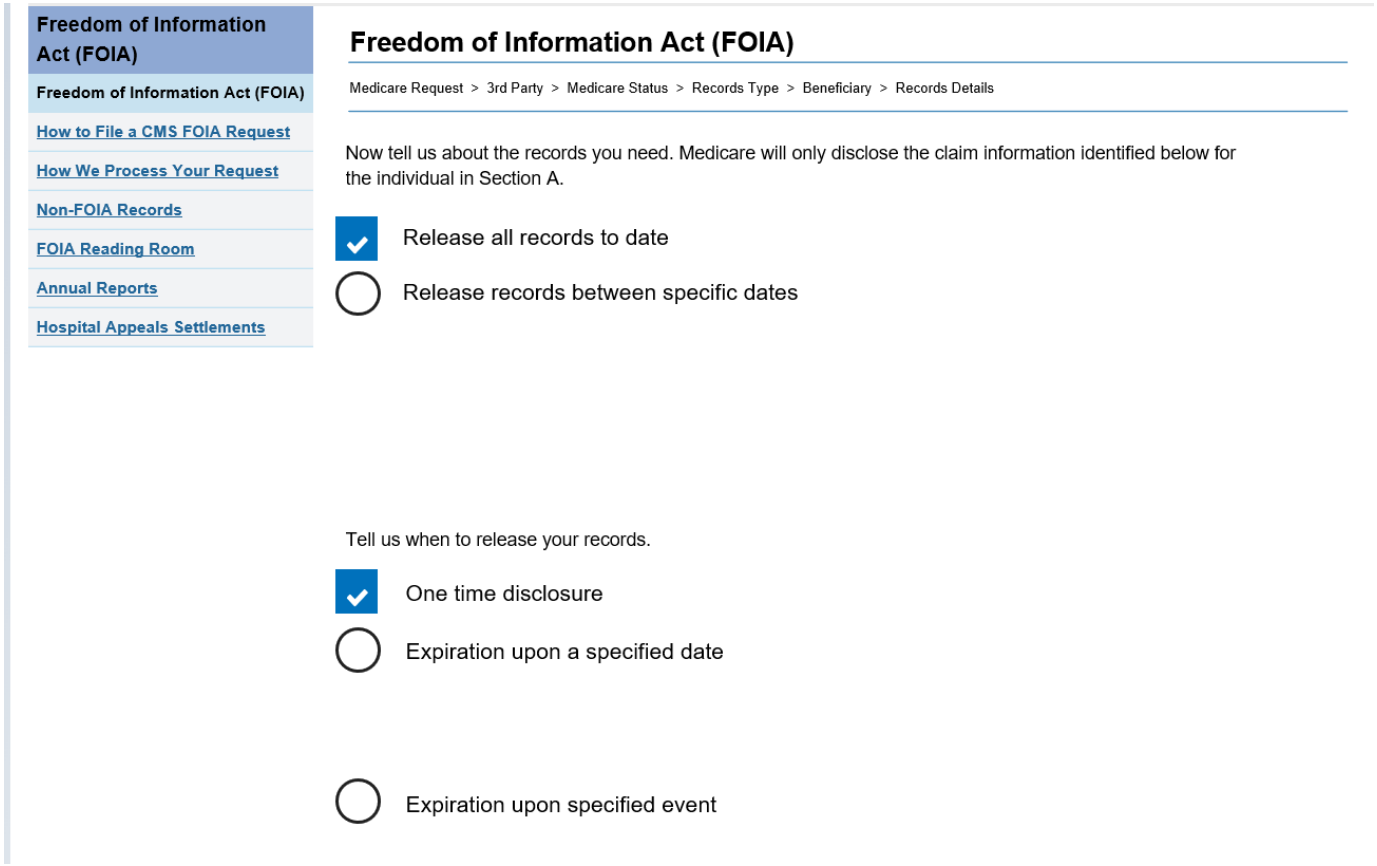
FOIA Intake Portal - 6

The next step (Part B) is to place parameters around the records request. Should the user select options where they have to specify dates and/or events, once the option is selected, additional field(s) will display for the user to fill in the required information.



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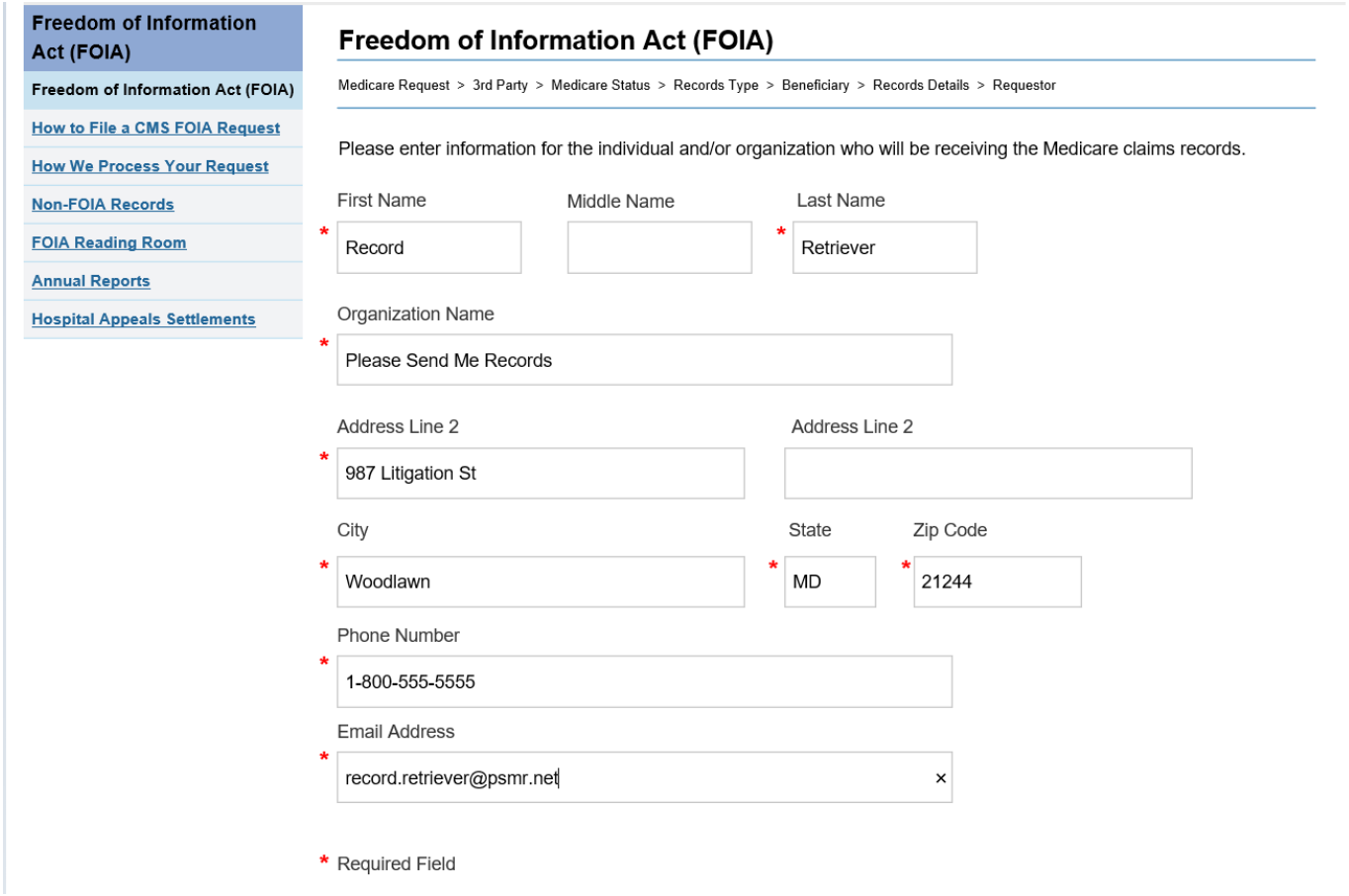
FOIA Intake Portal - 7

The third step (Part C) is to collect information about the entity requesting the claims records.



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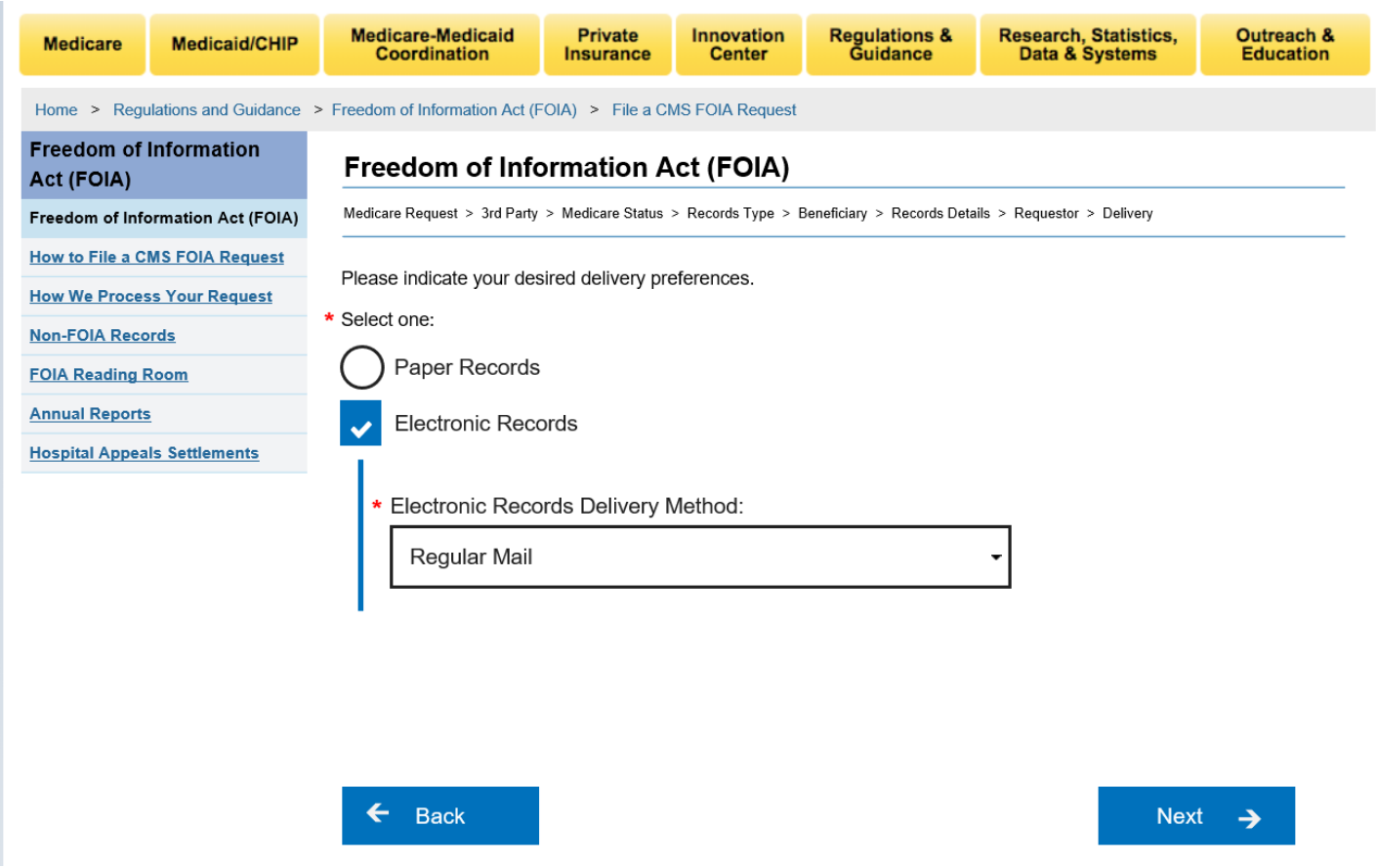
FOIA Intake Portal - 8

The fourth step is to collect delivery preferences. Should express delivery be an option, the user would be required to provide an express delivery account.



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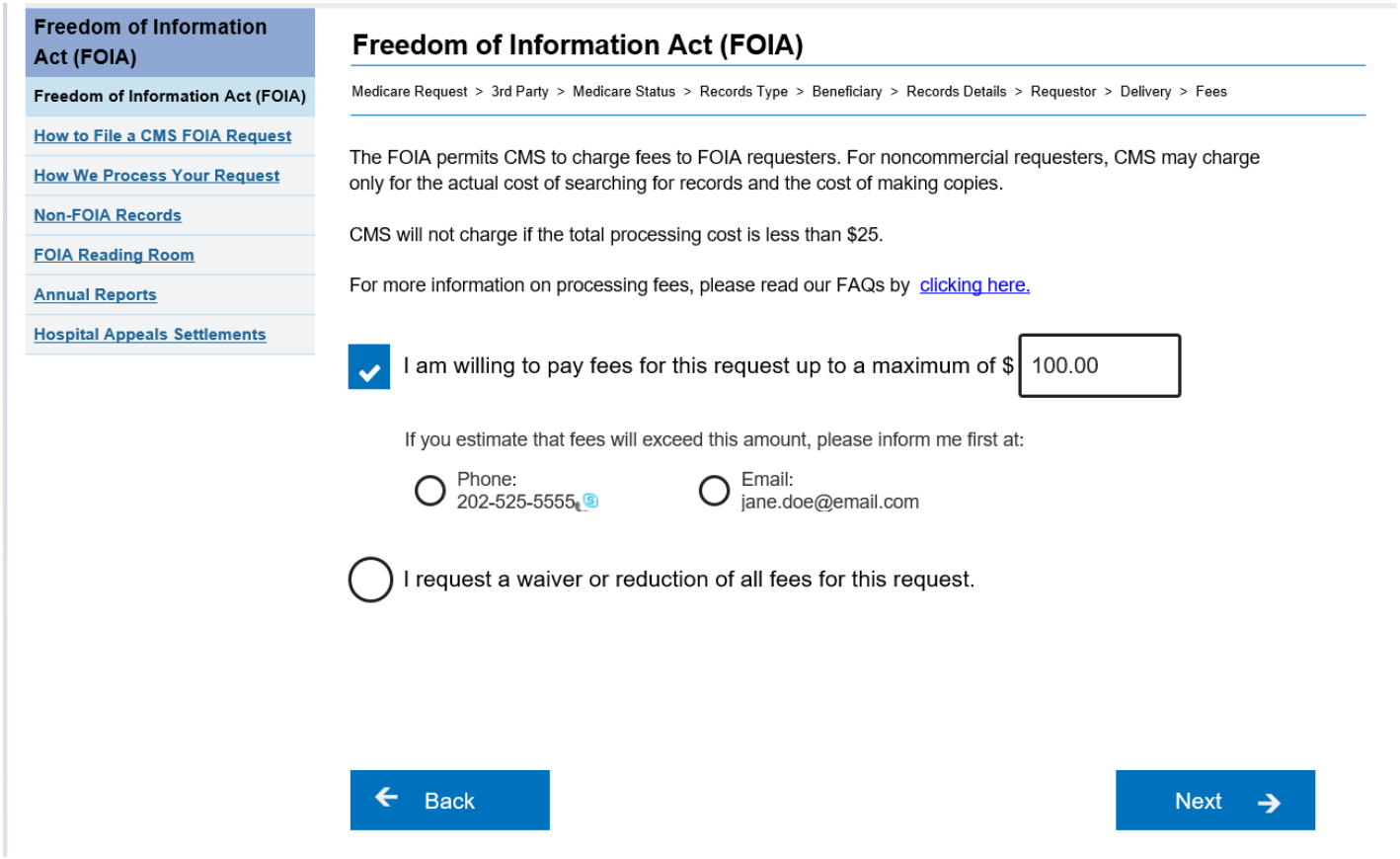
FOIA Intake Portal - 9

The fifth step, Part E, is to determine fee collections. Should the user request a waiver to the fees (not likely in a 3rd party situation but still possible), the user would select the second bullet and a memo field would display providing ample space to explain the reason for the waiver.



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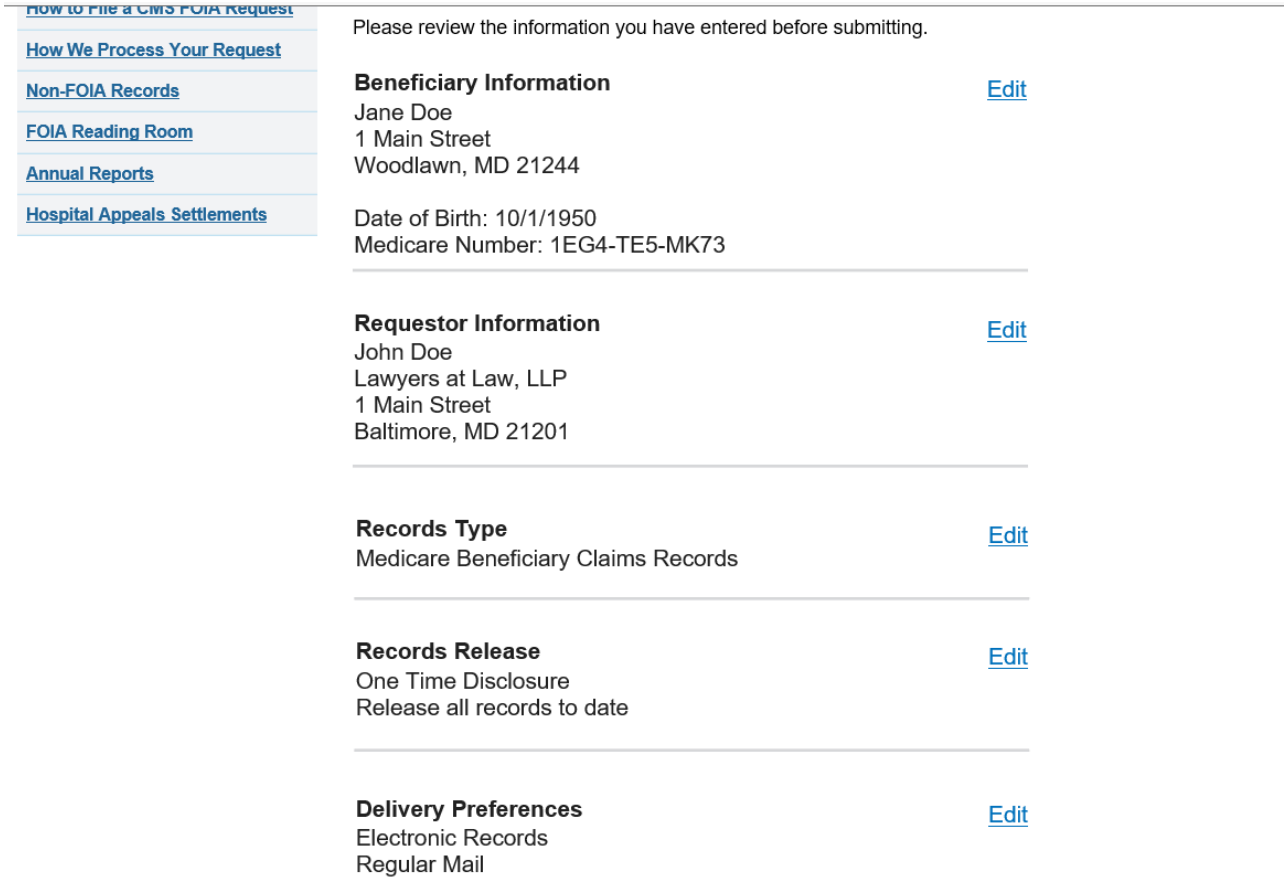
FOIA Intake Portal - 10

At all times, the user is provided information (i.e., bread crumbs) as to where they are in the process. The screen shot below provides the user an opportunity to review all of the information provided prior to going to the 6th step, the attestations and submissions.



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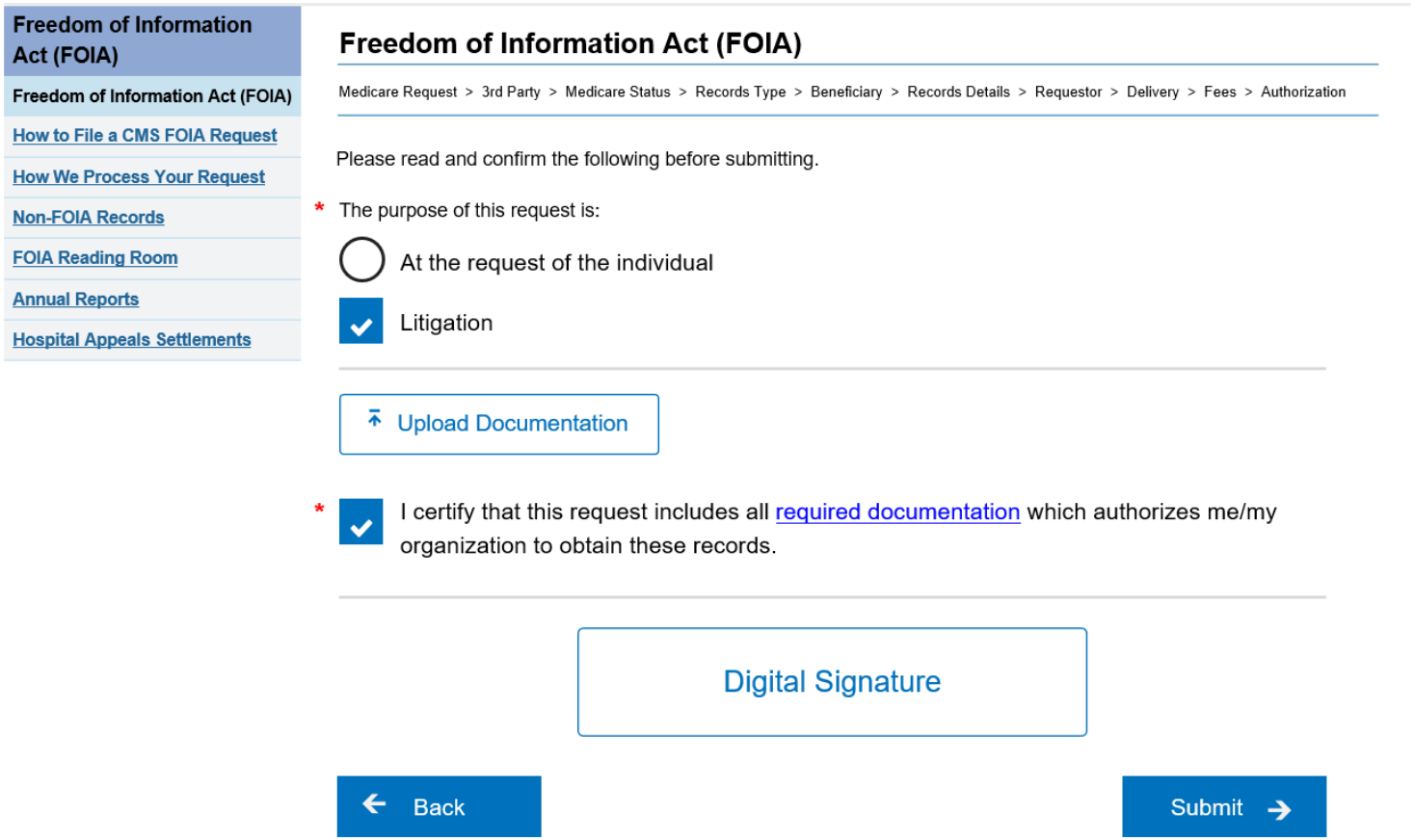
FOIA Intake Portal - 11

The final step, Part F, requires the user to upload beneficiary authorization documents which includes attestation language. The authorization document MUST be signed by the beneficiary. The user is provided a link to the form generally used by third parties to obtain proper authorization, as failure to have all of these components in the request will cause the request to be denied.



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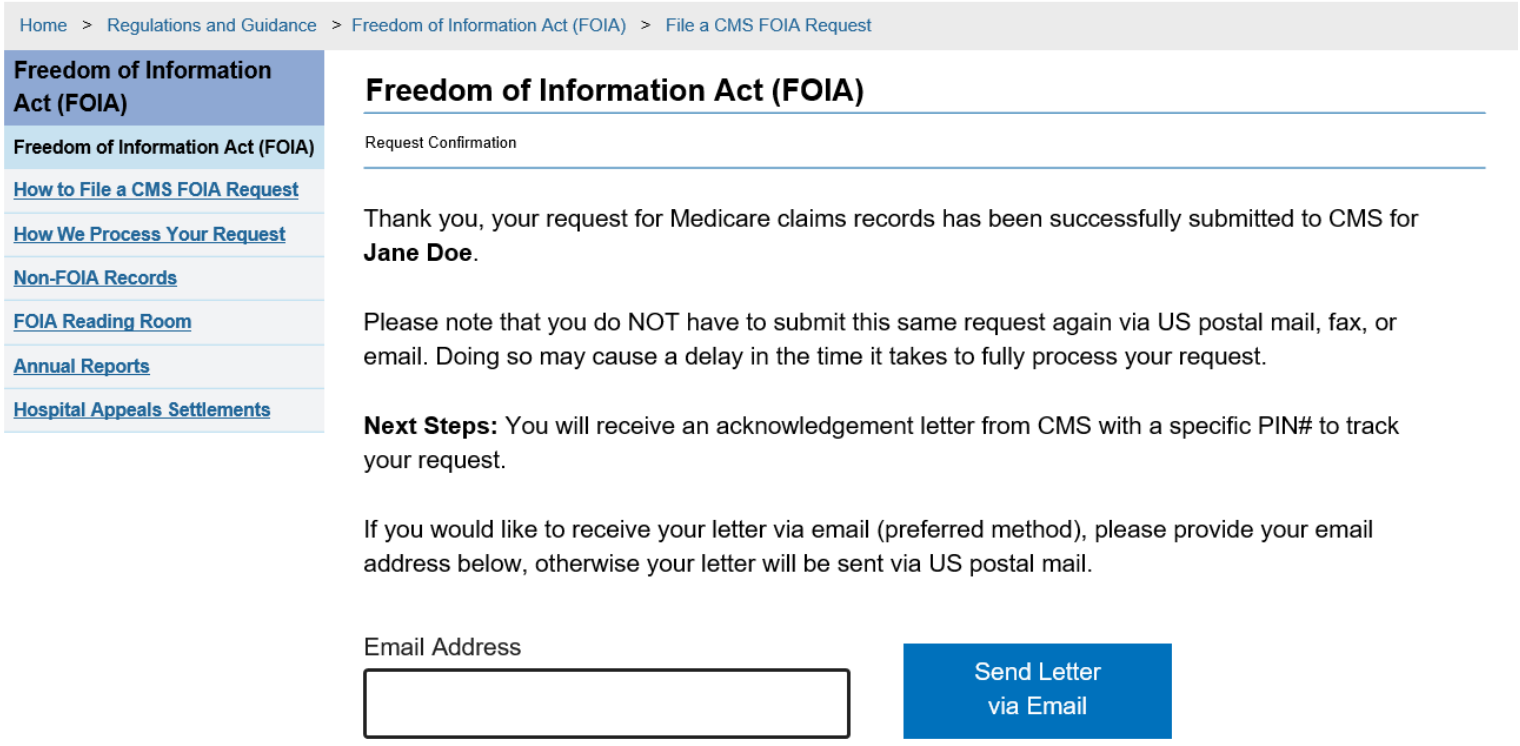
FOIA Intake Portal - 12

Once the request is submitted, the user is provided with general confirmation information. The user is advised against submitting duplicates as it would delay CMS' ability to fulfill the request. The online portal also offers CMS an option to email the requester with their confirmation number so that they may track the progress of their request.



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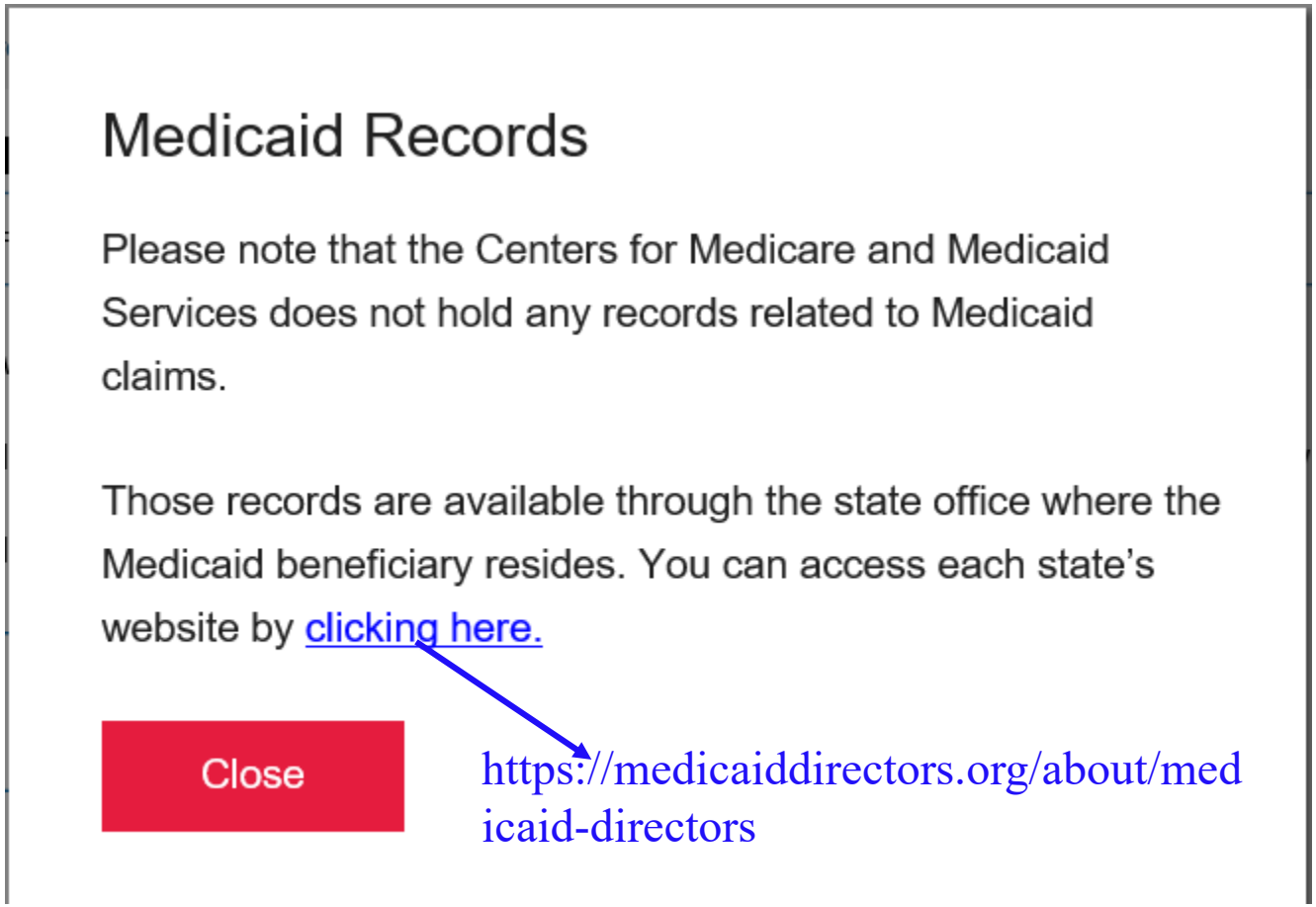
Appendix A – Medicaid Redirect



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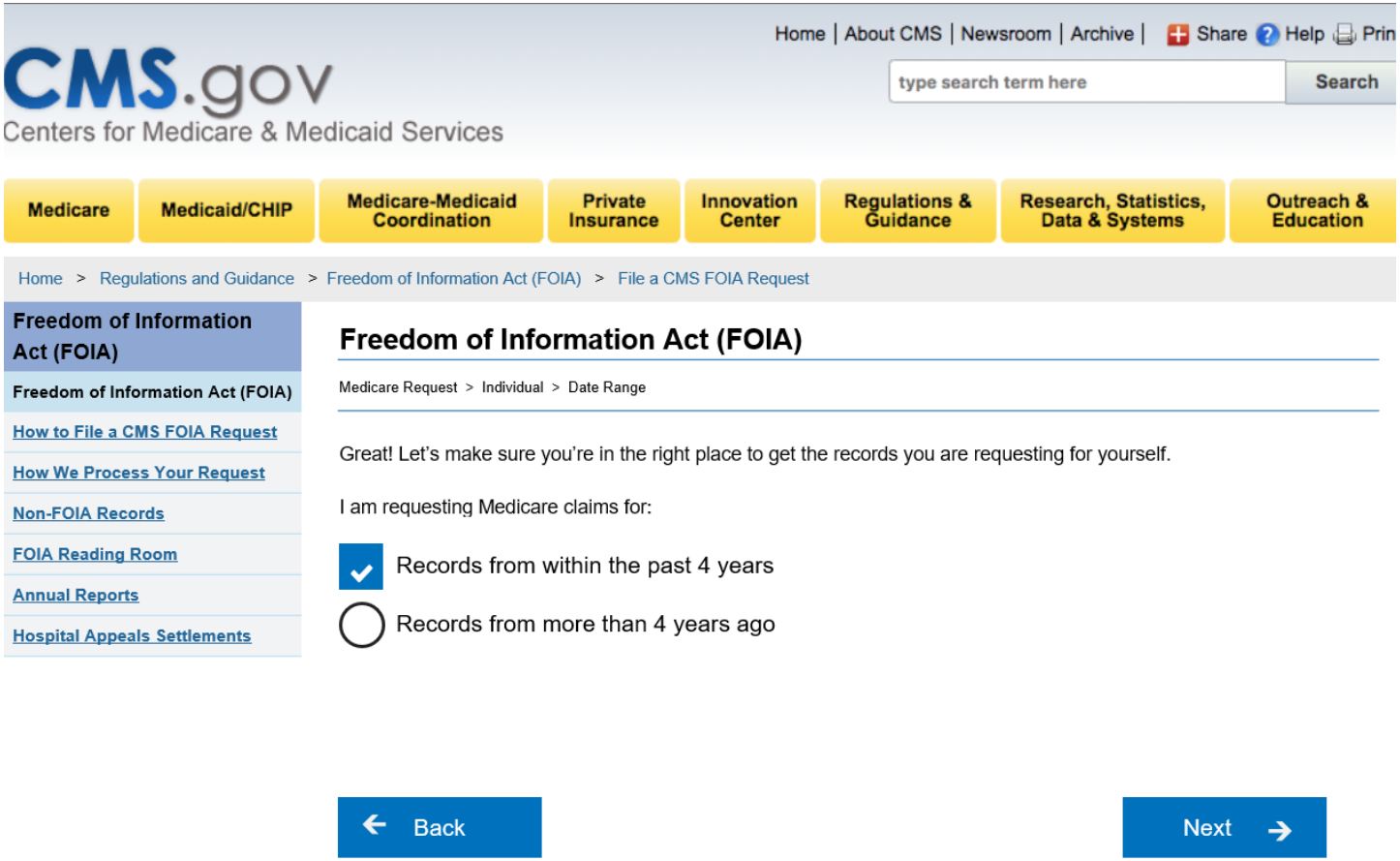
Appendix B – Beneficiary Redirect - 1

If the beneficiary is requesting Medicare claim records within the past 4 years, the portal will encourage the beneficiary to use Blue Button. However, if the beneficiary needs older claims, the portal will continue with a series of fillable fields and allow the user to submit the request through the FOIA process.



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Appendix B – Beneficiary Redirect - 2

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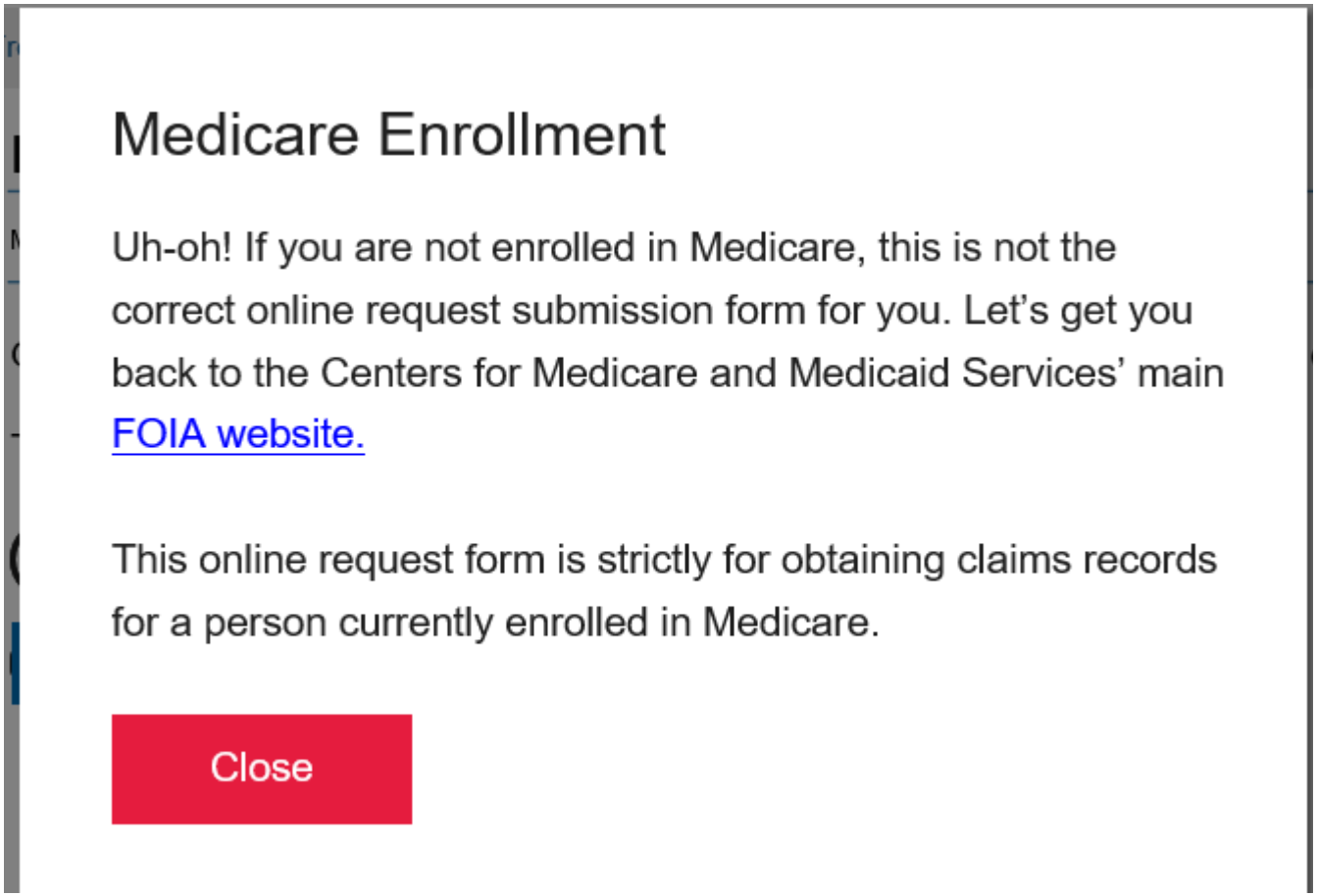
Appendix C – Not Enrolled Redirects



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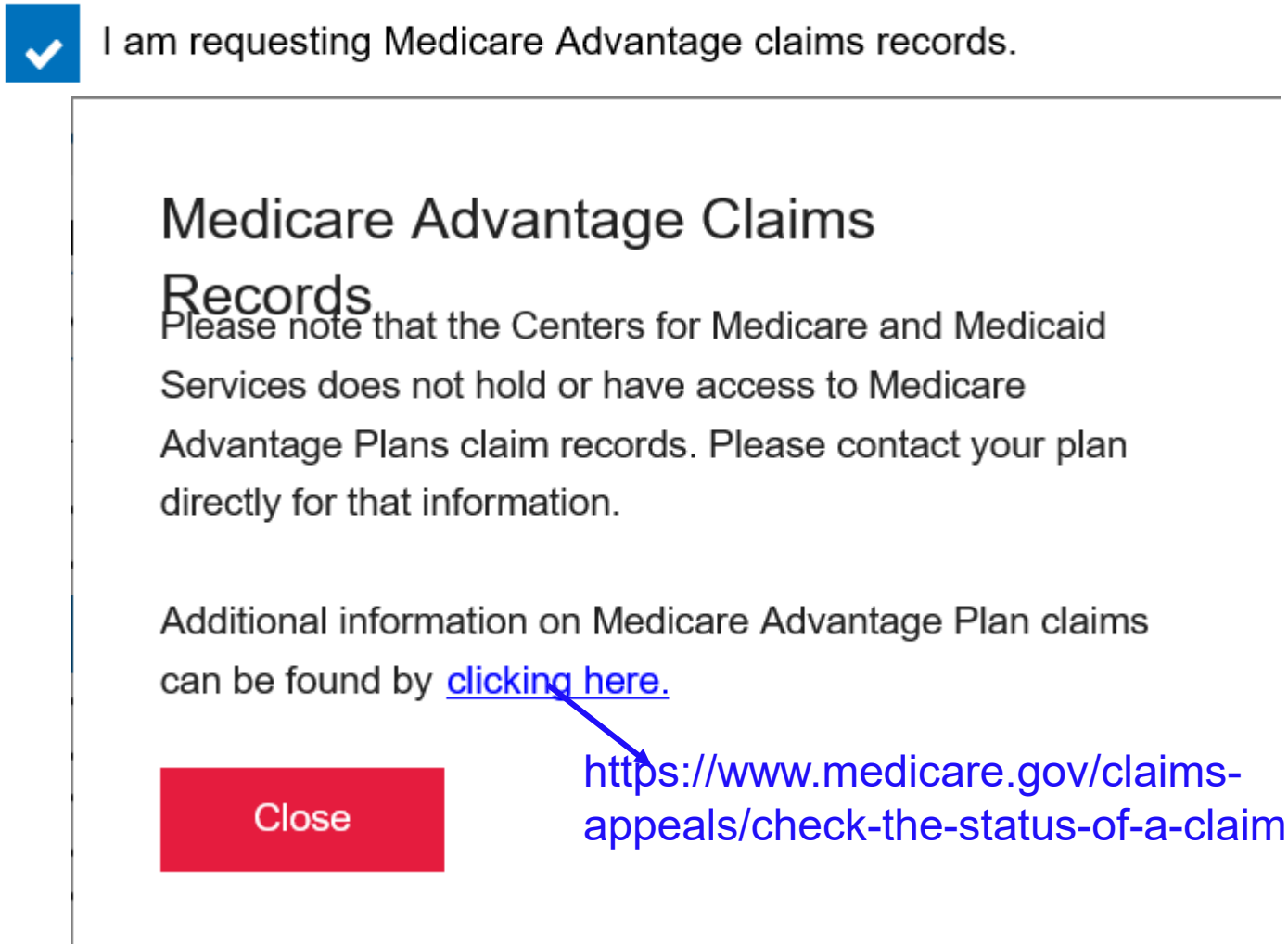
Appendix D – Non FFS Claims Redirect - 1



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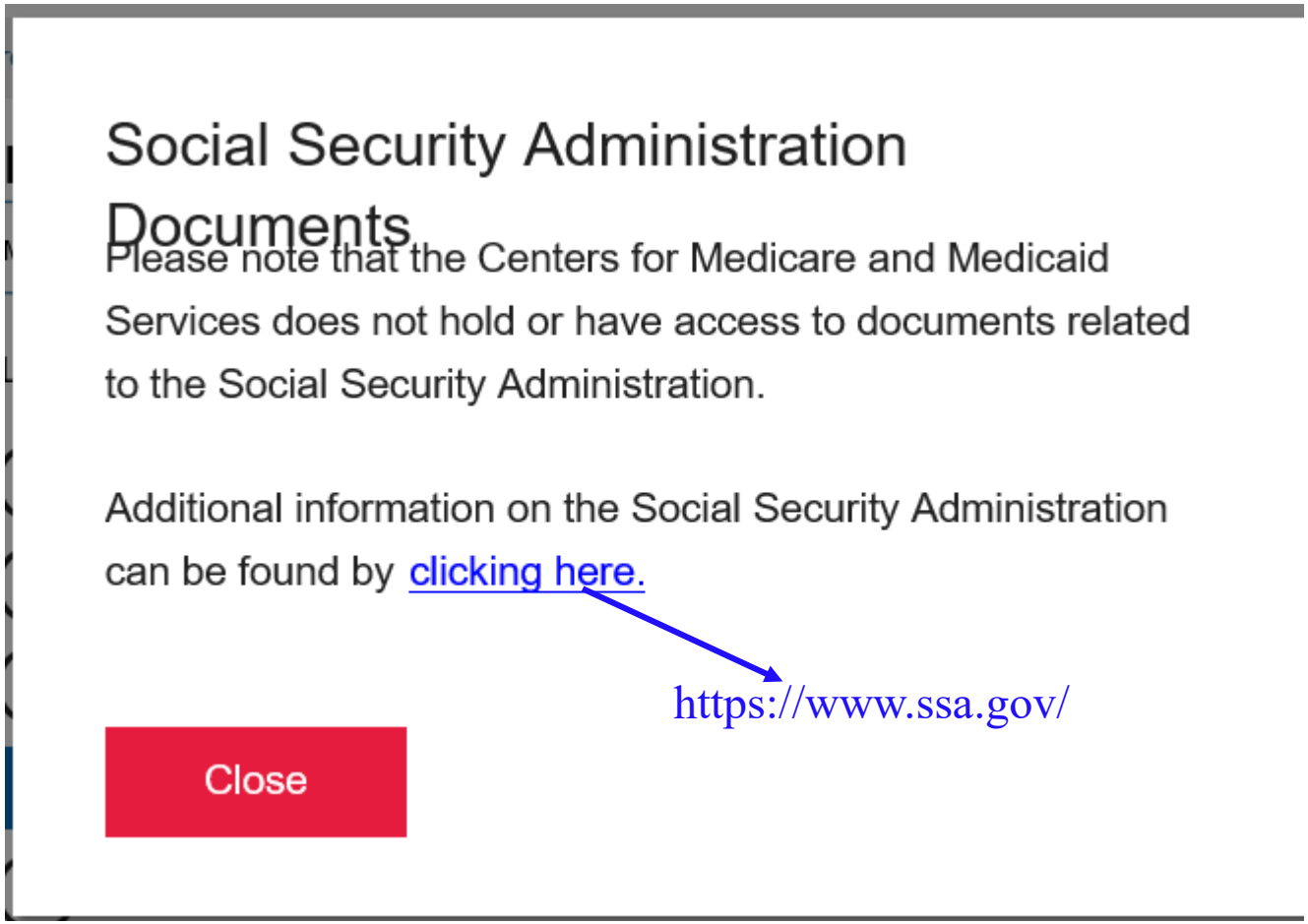
Appendix D – Non FFS Claims Redirect - 2

I am requesting Social Security Administration documents.



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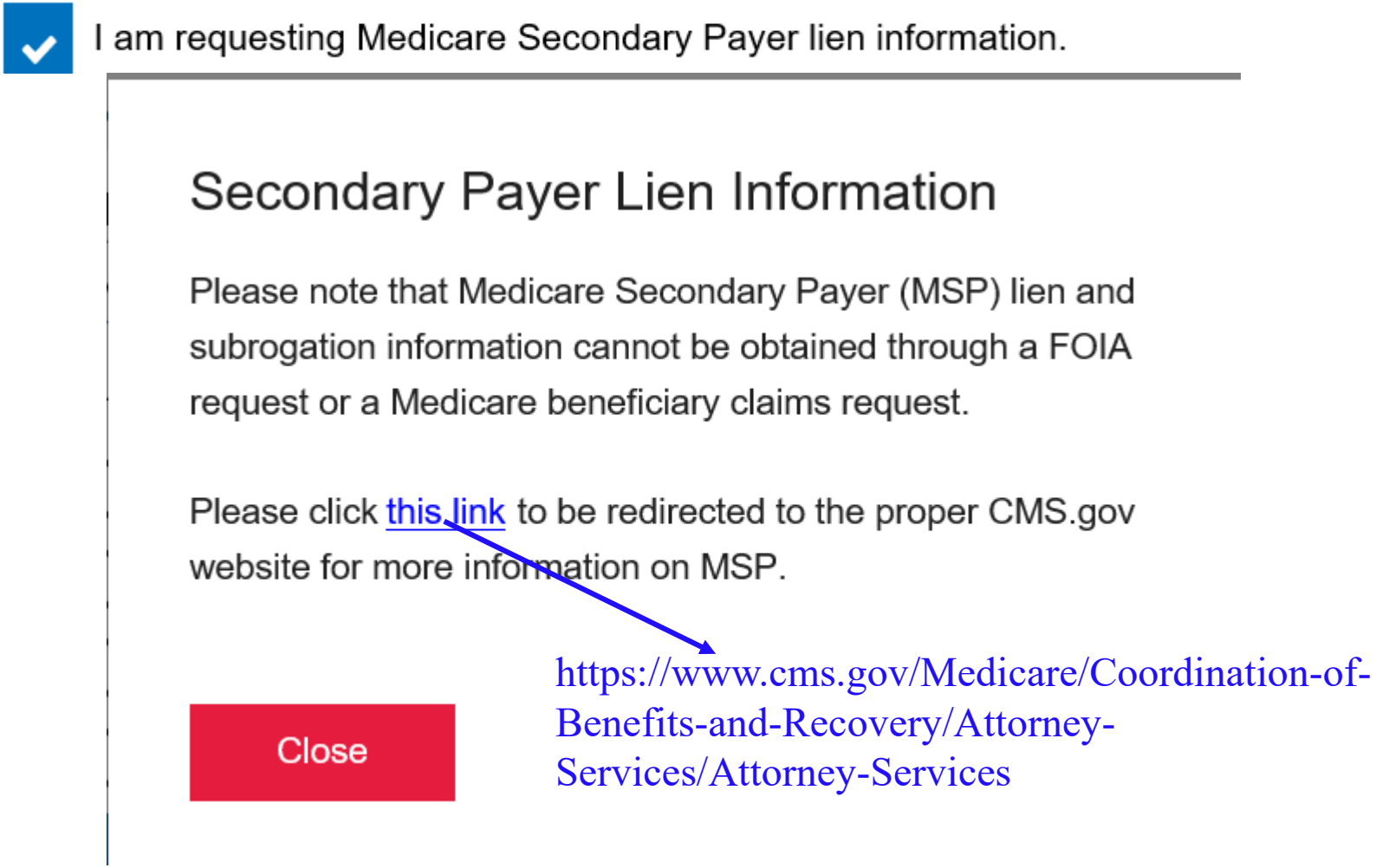
Appendix D – Non FFS Claims Redirect - 3



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