

J15 Part B IVR User Guide



1.866.290.4036

| Main Menu Option | Availability |
|------------------|---|
| Options 1–4 & 6 | Monday–Friday, 6 am–9 pm ET Saturday, 6 am–6 pm ET |
| Option 5 | 24 hours a day, 7 days a week (except for routine maintenance or system upgrades) |

Before you call:

- Please use a telephone handset or headset.
- Use of cell phones or speaker phone is **not** recommended.
- Review and gather the [Required Information](#). You have **3 opportunities** to enter it correctly before the **call is disconnected**.
- Use the MBI & Name to Number Converter (https://www.cgsmedicare.com/partb/tools/ivr_converter.html) to get the correct number sequence to enter on your telephone keypad.

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What is the IVR?

The Interactive Voice Response (IVR) system is a self-service option that allows providers to get answers to Medicare questions through an automated phone system without speaking to a customer service representative (CSR).

NOTE: Providers **must** use the IVR to access the information described in this guide. In addition, CSRs are required to refer callers to the IVR for applicable questions.

CSRs will **only** answer questions:

- That aren't available in the IVR (e.g., complex or claim-specific inquiries).
- When the IVR system isn't functioning, and callers can't access the information.

Reference: CMS IOM Pub. 100-09, Chapter 6, section 50.1 (<https://www.cms.gov/regulations-and-guidance/guidance/manuals/downloads/com109c06.pdf>)

Navigating the IVR

State Selection

| Key Selection | State |
|---------------|----------|
| 1 | Kentucky |
| 2 | Ohio |

Press the key for the appropriate state. Then, press:

- # for the **Customer Service Closure Schedule** OR
- **Any key** to continue to the **main menu**.

Main Menu

| Key Selection | Menu Option |
|---------------|---|
| 1 | Claim Status or Redetermination (Appeal) Status |
| 2 | Financial Information |
| 3 | Other Inquiries |
| 4 | Validate NPI Information |
| 5 | General Medicare Information |
| 6 | Telephone Reopenings |
| 7 | Repeat Main Menu options |
| 0 | Customer Service phone number |
| * | Take a feedback survey once your interaction is complete. |

NOTE: Use the hyperlinks above to get more option details.



Required Information

Gather this information **before you call**. You have **3 opportunities** to enter it correctly before the call is disconnected.

| All Calls | Calls About a Specific Claim or Beneficiary |
|---|---|
| <ul style="list-style-type: none"> National Provider Identifier (NPI) Provider Transaction Access Number (PTAN) Provider Tax Identification Number (TIN) (last 5 digits) | <ul style="list-style-type: none"> Beneficiary Name Beneficiary Date of Birth Beneficiary Medicare Number (<i>Medicare Beneficiary Identifier [MBI]</i>) Date of Service (<i>if applicable</i>) |

How to Enter Provider Information - NPI, PTAN, & TIN

1. NPI

Enter your **10-digit NPI** followed by #.

The IVR will repeat the NPI.

If **correct**, press **1**.

To **re-enter**, press **2**.

NOTE: If the NPI or PTAN isn't found, or the combination is invalid, the IVR will prompt you to re-enter. The IVR will disconnect after 3 failed attempts to enter a valid NPI, PTAN, or NPI/PTAN combination.

2. PTAN

If **numeric only**, press **1**.

Enter your **PTAN** followed by #.

If **alphanumeric**, press **2**.

See the **PTAN Letter to Number Chart** to the right.

Enter your **PTAN** followed by #.

3. TIN

Enter the **last 5 digits** of your tax ID followed by #.

Note: If the TIN isn't found or valid, the IVR will prompt you to re-enter.

| PTAN Letter to Number Chart | | | |
|-----------------------------|-------------|-------------|-------------|
| A 21 | H 42 | O 63 | U 82 |
| B 22 | I 43 | P 71 | V 83 |
| C 23 | J 51 | Q 11 | W 91 |
| D 31 | K 52 | R 72 | X 92 |
| E 32 | L 53 | S 73 | Y 93 |
| F 33 | M 61 | T 81 | Z 12 |
| G 41 | N 62 | | |



How to Enter the Beneficiary's Medicare Number & Name

Before you call, use the **Letter to Number Chart** below or **MBI & Name to Number Converter** (https://www.cgsmedicare.com/partb/tools/ivr_converter.html) to get the correct number sequence to enter on your telephone keypad.

| Letter to Number Chart | | | |
|------------------------------|------------------------------|------------------------------|------------------------------|
| A *21 | H *42 | O *63 (not valid for MBI) | U *82 |
| B *22 (not valid for MBI) | I *43 (not valid for MBI) | P *71 | V *83 |
| C *23 | J *51 | Q *11 | W *91 |
| D *31 | K *52 | R *72 | X *92 |
| E *32 | L *53 (not valid for MBI) | S *73 (not valid for MBI) | Y *93 |
| F *33 | M *61 | T *81 | Z *12 (not valid for MBI) |
| G *41 | N *62 | | |

Medicare Beneficiary Identifier

Enter the MBI.

The IVR will **repeat the MBI** and ask if it's correct:

- **Press 1 - Yes** (Correct)
- **Press 2 - No** (To re-enter the MBI)

Note: The IVR will disconnect after 3 failed attempts to enter a beneficiary's Medicare number.

First Name

Enter the first letter of the first name.

- Example: Susan = S = 7.

Last Name

Enter up to the first 6 letters of the last name followed by #
(e.g., Johnson = johnso = 5-6-4-6-7-6 #).

- < 6 letters (e.g., Angel = angel = 2-6-4-3-5 #)
- < 6 letters & a suffix (e.g., Lee Jr., = leejr = 5-3-3-5-7 #)
- Ignore spaces or hyphens between last names (e.g., Smith Davis = smithd = 7-6-4-8-4-3 #)

How to Enter Dates

Beneficiary's Date of Birth

- Enter **MMDDCCYY**.
- Example: January 3, 1932 = 01031932

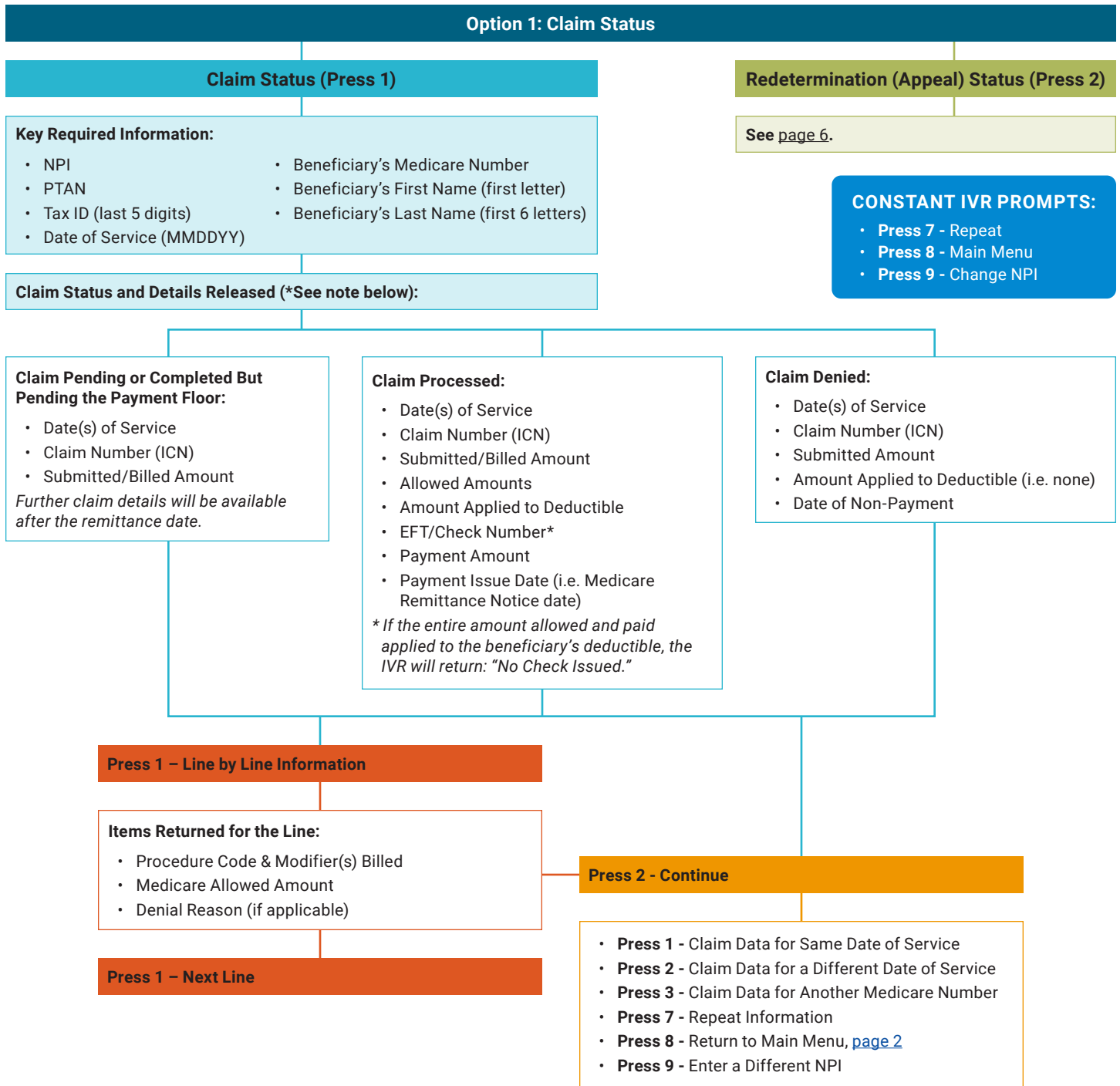
Date of Service

- Enter **MMDDYY**.
- Example: January 3, 2025 = 010325

The IVR requires and validates the date before releasing claim status.



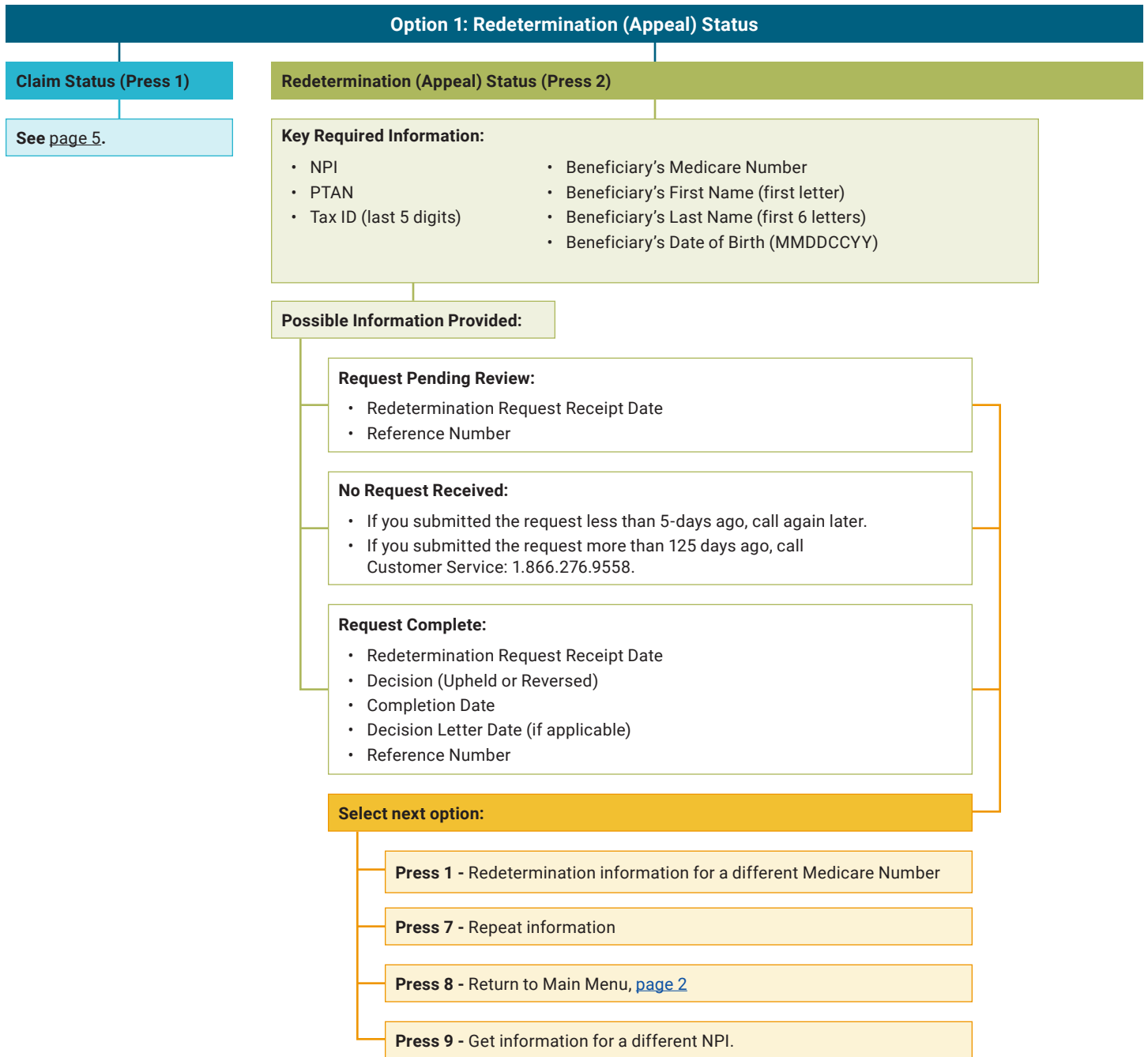
Navigating Main Menu Option 1 (Claim Status)



Note: The IVR will not release payment information for unassigned claims. In addition, the IVR currently doesn't support inquiries related to 837D dental claims.



Navigating Main Menu Option 1 (Redetermination [Appeal] Status)

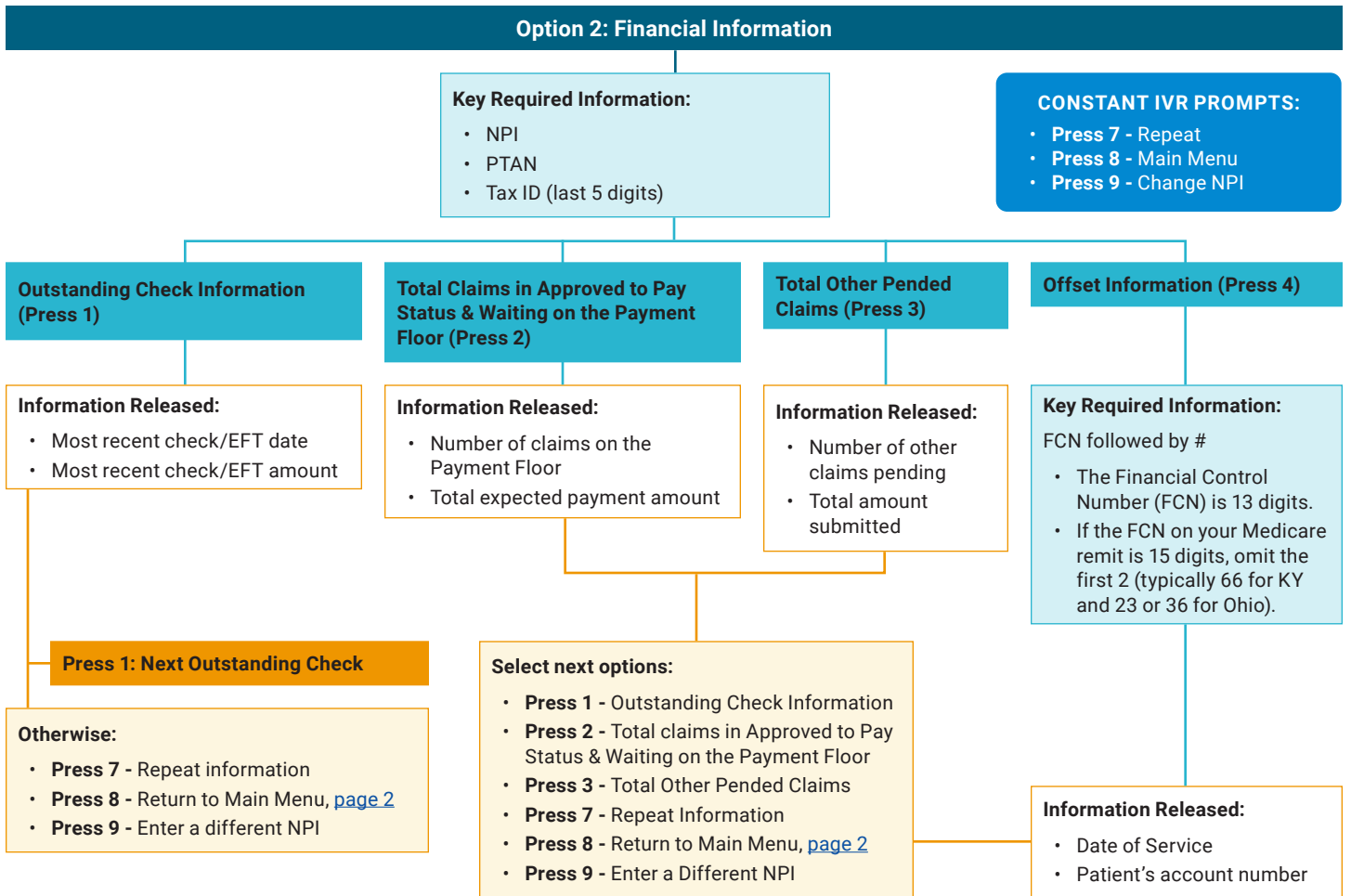


CONSTANT IVR PROMPTS:

- Press 7 - Repeat
- Press 8 - Main Menu
- Press 9 - Change NPI

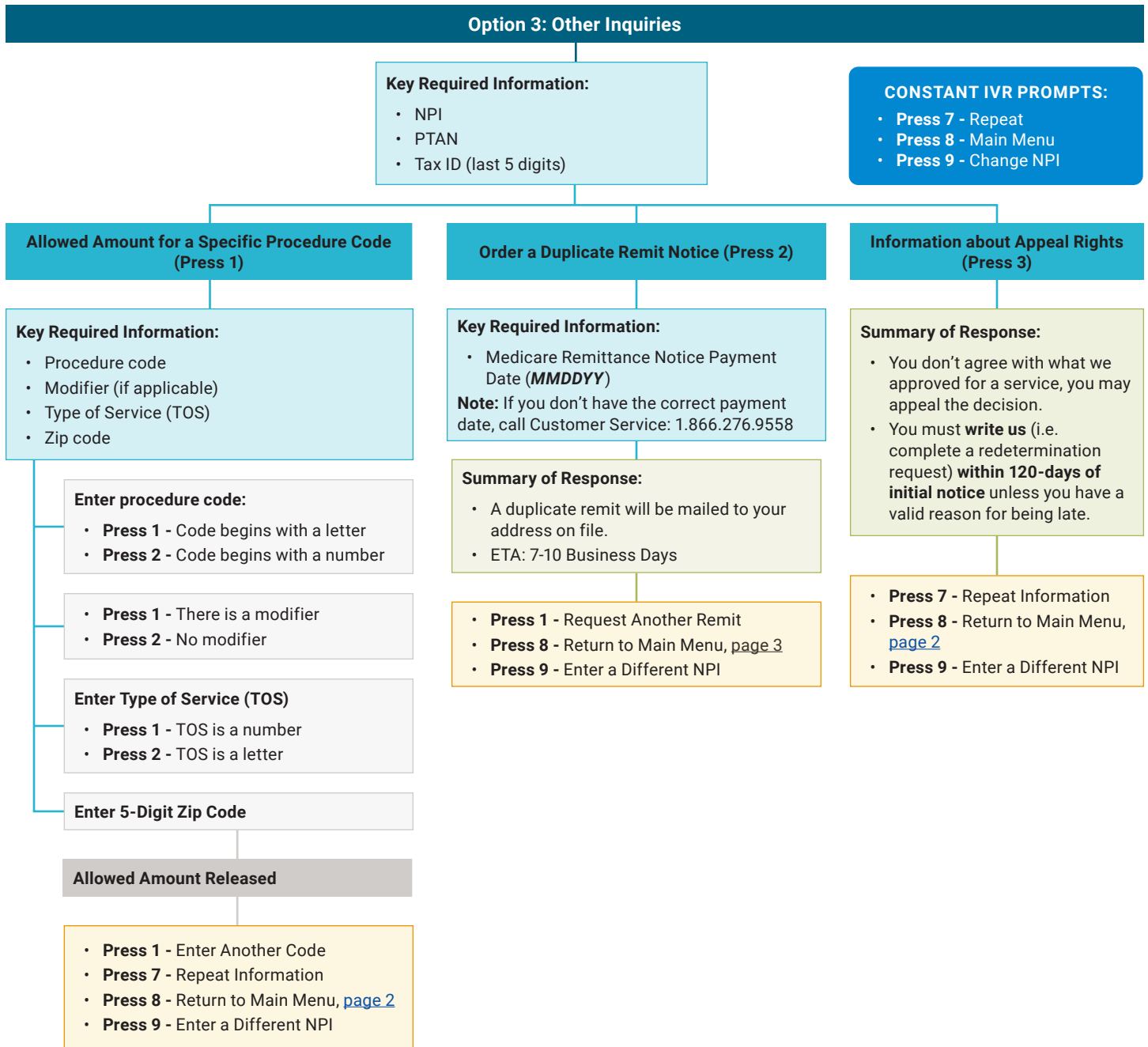


Navigating Main Menu Option 2



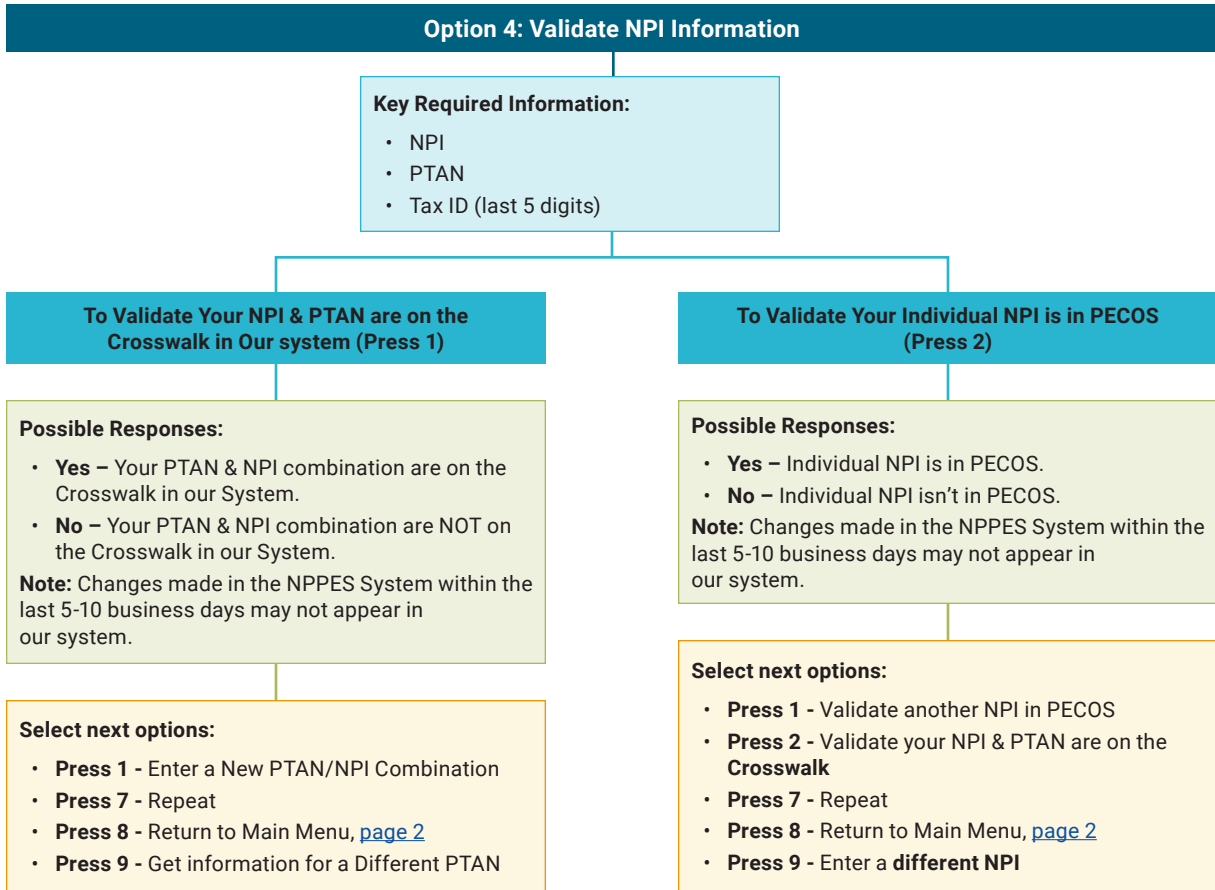


Navigating Main Menu Option 3



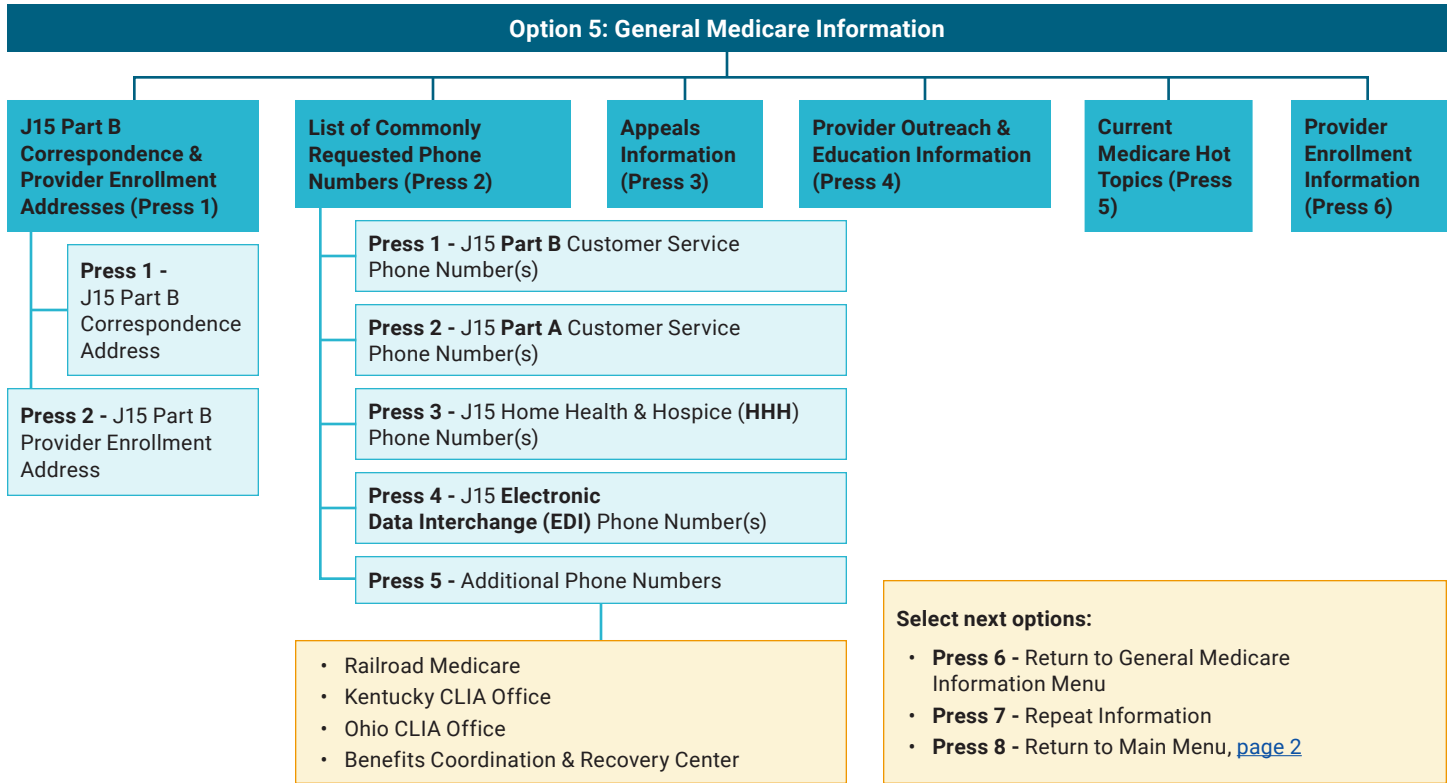


Navigating Main Menu Option 4





Navigating Main Menu Option 5





Navigating Main Menu Option 6

Option 6: Telephone Reopenings (TRO)

Note: You may also refer to "Requesting Telephone Reopenings through the IVR" job aid: https://www.cgsmedicare.com/partb/cs/requesting_tele_reopen_ivr.pdf.

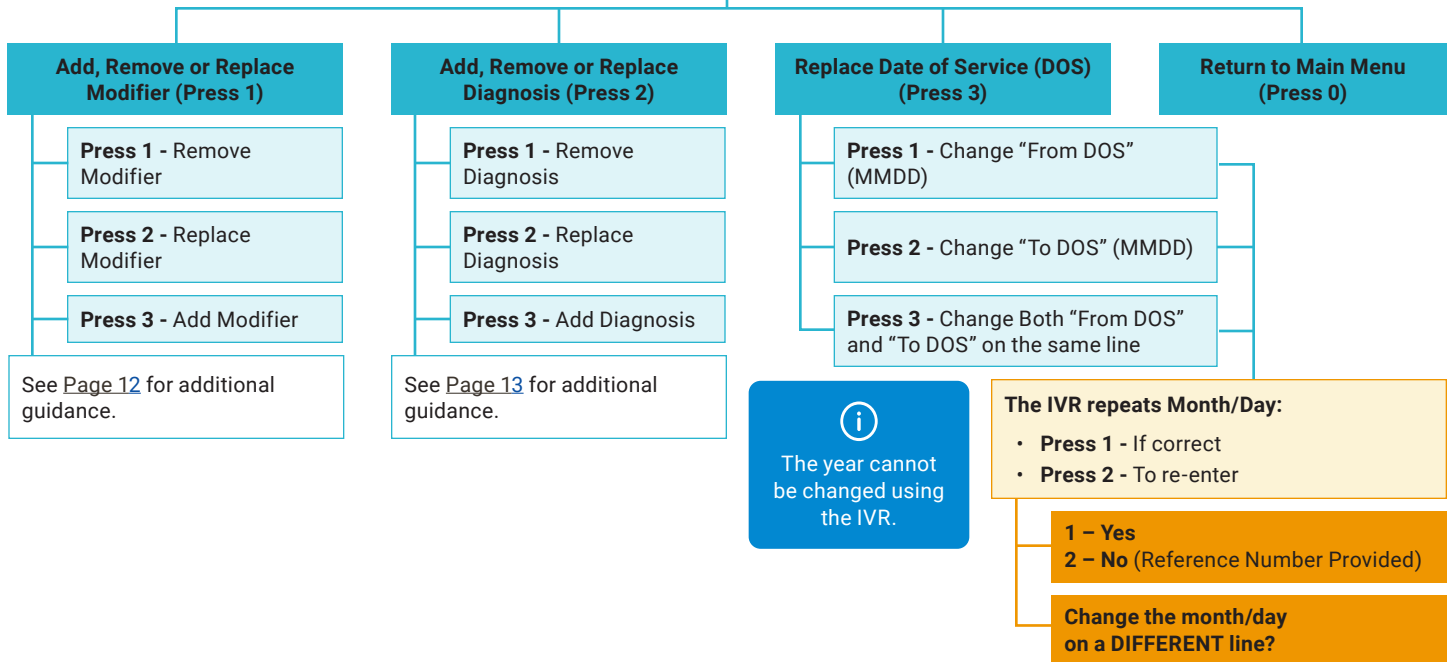
Key Required Information:

Provider Information:

1. **NPI** followed by #
2. **PTAN** followed by #
3. **Tax ID** (last 5 digits)
4. **Caller Name** followed by # (See letter conversion chart on [Page 3](#))
5. **Provider Phone Number** followed by #

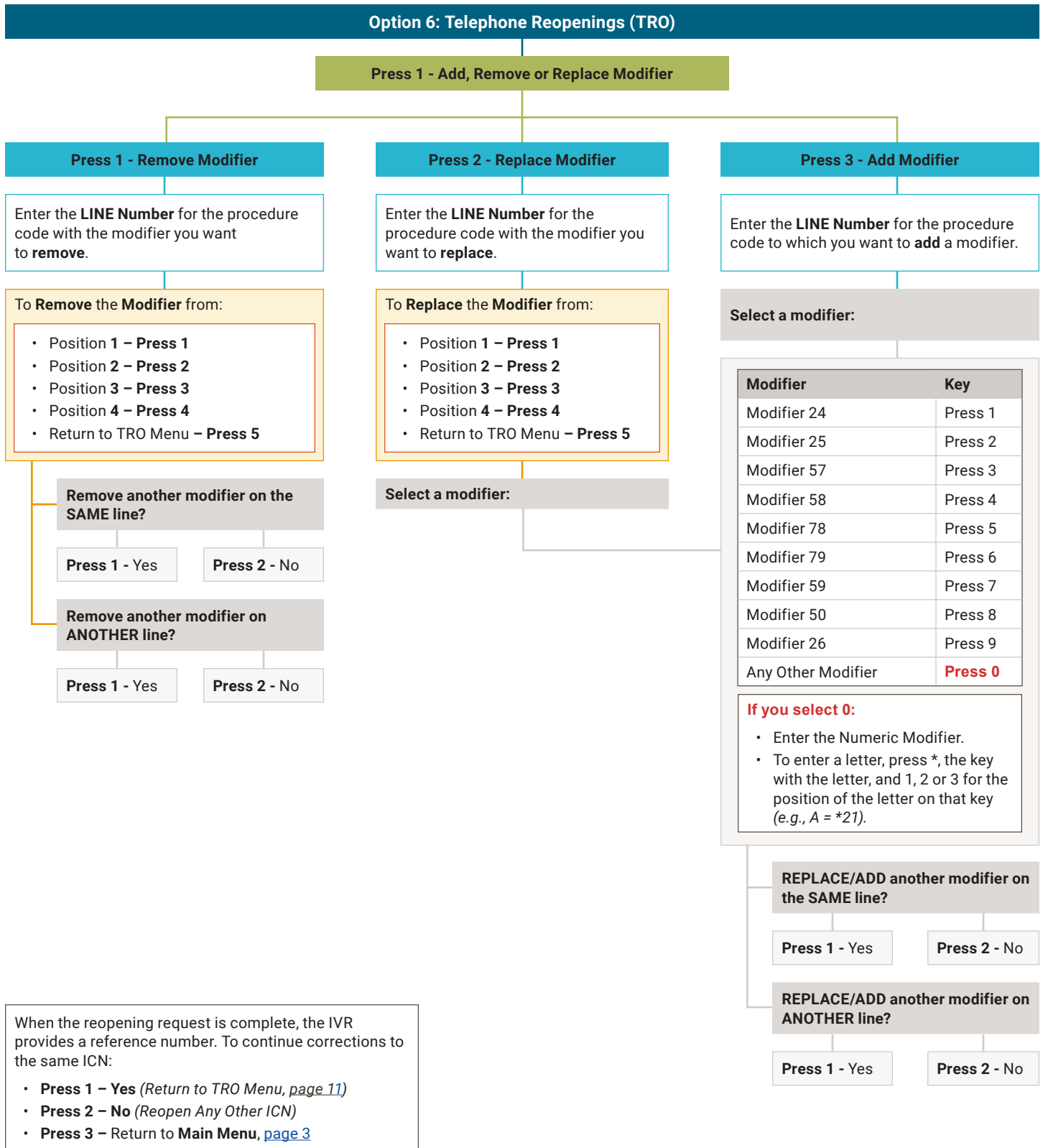
Beneficiary/Claim Information:

1. **Medicare Number**
2. **First name** (first letter)
3. **Last name** (first 6 letters) followed by #
4. **13-Digit Internal Claim Control Number** (If claim was previously adjusted, appealed or needs documentation, call Customer Service.)





Navigating Main Menu Option 6 (Add, Remove, or Replace Modifier Detail)





Navigating Main Menu Option 6 (Add, Remove, or Replace Diagnosis Detail)

