

# Coverage Gap Discount Program



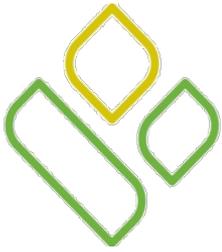
## *CGDP PORTAL DIRECT PAYMENT PROCESS*



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*Home Tab Functionality*



# CGDP Portal DPP-Sponsors Topics

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In this training session you will learn about the Coverage Gap Discount Program (CGDP) Portal Direct Payment Process (DPP) – Sponsors **Home** tab.

This training will introduce you to the following topics:

1. First look introduction of the **Home** Tab
2. **Home** Tab Regions
  - **Tabbed region – Home**
  - **Home Filter region**
  - **Home Welcome Message region**
  - **Home Filter Results region**
  - **Home Status Definitions region**
3. Work Instruction for utilizing the **Home** tab functionality

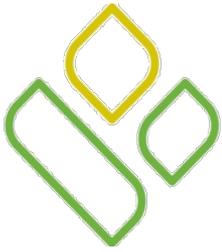
# *CGDP PORTAL DPP- SPONSORS*



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*Introduction to the Home Tab*



# CGDP Portal DPP-Sponsors Home Tab

The **Home** tab allows Sponsors to review and work with distributed invoices and to access all areas of the CGDP Portal DPP system.

This training session will describe each of the five regions displayed on the **Home** tab and provide direction on the functionality of each.

**1** Home | Payments | Completed | Receipts | Reports

**2** **Sponsor Portal Coverage Gap Discount Program**

Parent Org. ID: S#### | Contract Number: ANY | Reporting Period: ANY | Status: ANY

Parent Org. ID	Contract Number	Reporting Period	Status	Select
S####	H####	201403	Available	<input type="radio"/>
S####	H####	201402	Available	<input type="radio"/>
S####	H####	201403	Available	<input type="radio"/>
S####	H####	201401	Available	<input type="radio"/>
S####	H####	201401	Available	<input type="radio"/>
S####	H####	201402	Available	<input type="radio"/>

**3** Welcome to Coverage Gap Discount Portal where you can initiate a payment, check the status of payments and receipt of payments as well as view your reports.

For payment functions, start by selecting a line item from the list to the left of this message.

**5** **Available** - Invoice is ready for payment initiations  
**Failed** - One or more items has an unsuccessful payment attempt  
**Incomplete** - One or more items have not been paid  
**Pending** - All line items have been initiated successfully  
**Successful** - All line items have been paid successfully

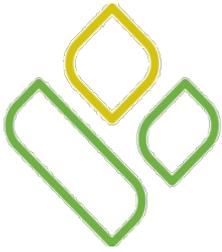
# *CGDP PORTAL DPP- SPONSORS*



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*Home Tab Regions*



## CGDP Portal DPP-Sponsors Tabbed Region – Home Tab

The **Tabbed region** allows the user to review and work with distributed invoices loaded to the Portal on a quarterly basis. It is available in all functionality provided in the system and provides the ability to move throughout the Sponsor Portal.

When first viewing the **Home** tab, only the **Home** tab is an Active tab and the **Reports** tab is an Available tab for selection.

The following example displays the **Home** tab as an Active tab and the **Reports** tab as an Available tab. The **Payments** tab, **Completed** tab and **Receipts** tab are not available for selection.

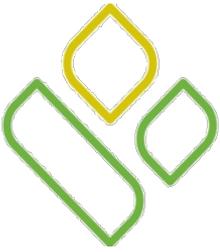


To access all tabs in the Sponsor Portal, selection of a distributed invoice line must be performed.

Once a selection has been made on the **Home** tab to review specific distributed invoices, the **Payments** tab, **Completed** tab and **Receipts** tab will become Available tabs.

The following example displays the **Home** tab as an Active tab and the **Payments**, **Completed**, **Receipts** and **Reports** tabs as Available tabs.





## CGDP Portal DPP-Sponsors Home Filter Region

The **Home Filter region** allows the user to search data listed by the defaulted Parent Organization ID.

Results of the search criteria entered in the **Home Filter region** will be displayed in the **Home Filter Results region**.

In the following example, the **Home Filter region** is displayed.

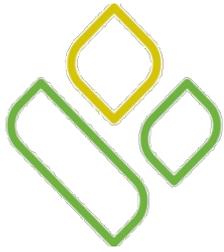
**Sponsor Portal** **Coverage Gap Discount Program**

② Parent Org. ID: Contract Number Reporting Period: Status: 

S#### ▼ H#### ▼ ANY ▼ ANY ▼

This region contains the following four fields to assist with narrowing distributed invoice criteria:

- Parent Org. ID: defaults to the Sponsor Parent Organization ID used to log into the Portal. Example displays S####.
- Contract Number: allows the user to select a single Sponsor contract number or display all Contract Numbers associated with the Parent Organization ID, from the drop down list.
- Reporting Period: allows the user to select reporting periods for distributed invoices, by calendar year and quarter, in YYYYQQ format. To view all distributed invoices, users can select 'ANY' from the drop down list.
- Status: allows the user to select a specific status assigned to distributed invoices or allows a user to select 'ANY' to view all statuses assigned.



# CGDP Portal DPP-Sponsors Home Welcome Message Region

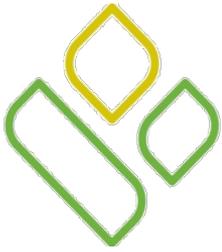
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The **Home Welcome Message region** provides a quick overview of some of the tasks that are available in the system, as well as providing instruction for beginning the payment functionality process.

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Welcome to Coverage Gap Discount Portal where you can initiate a payment, check the status of payments and receipt of payments as well as view your reports.

For payment functions, start by selecting a line item from the list to the left of this message.



# CGDP Portal DPP-Sponsors Home Filter Results Region

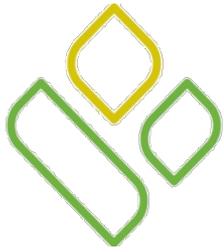
The **Home Filter Results region** displays data matching the selected search criteria entered in the **Home Filter region**.

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<u>Parent Org. ID</u>	<u>Contract Number</u>	<u>Reporting Period</u>	<u>Status</u>	<u>Select</u>
S####	H####	201401	Available	<input type="radio"/>
S####	H####	201402	Available	<input type="radio"/>
S####	H####	201403	Available	<input checked="" type="radio"/>

This region contains the following five fields that assist in reviewing distributed invoices for processing:

- Parent Org. ID: defaults to the Sponsor Parent Organization ID used to log into the Portal.
- Contract Number: displays a specific Contract Number or all Contract Numbers associated with the Parent Organization ID, based on the distributed invoice line selected in the **Home Filter** region.
- Reporting Period: displays invoices distributed by calendar year and quarter, in YYYYQQ format. Display can contain specific quarters or all distributed quarters, based on the selection in the **Home Filter** region.
- Status: displays the status of distributed invoices. Display can contain data for one status type or display all statuses, based on the selection criteria entered in the **Home Filter** region.
- Select: provides a user with the ability to select an individual distributed invoice line to access invoice line items associated with the invoice. This action also activates all tabbed pages in the **Tabbed** region.



# CGDP Portal DPP-Sponsors Home Status Definitions Region

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The **Home Status Definitions region** provides explanations of each of the statuses that may display in the **Home Filter Results region**.

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**Available** - Invoice is ready for payment initiations

**Failed** - One or more items has an unsuccessful payment attempt

**Incomplete** - One or more items have not been paid

**Pending** - All line items have been initiated successfully

**Successful** - All line items have been paid successfully

# *CGDP PORTAL DPP- SPONSORS*



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*Home Tab Functionality  
Work Instruction*



# CGDP Portal DPP-Sponsors Home Tab Work Instruction

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You have now learned about the different regions and fields available on the **Home** tab.

In this section of the training session, a high level overview of the steps needed to utilize the **Home** tab functionality will be presented on the following slides.



# CGDP Portal DPP-Sponsors

## Home Tab – Filter Search

Select a specific Sponsor Contract Number from the drop down listing in the Contract Number field of the **Home Filter region**.

In the following example, the Contract Number field is populated with H#### and the **Home** tab is Active and the **Reports** tab is Available.

[Contact Us](#) | [My Profile](#) | [Logout](#) | [Help](#) | [Reporting](#)

Home Payments Completed Receipts Reports

### Sponsor Portal Coverage Gap Discount Program

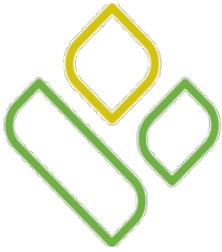
Parent Org. ID:  Contract Number:  Reporting Period:  Status:

<u>Parent Org. ID</u>	<u>Contract Number</u>	<u>Reporting Period</u>	<u>Status</u>	<u>Select</u>
S####	H####	201401	Available	<input type="radio"/>
S####	H####	201402	Available	<input type="radio"/>
S####	H####	201403	Available	<input type="radio"/>

Welcome to Coverage Gap Discount Portal where you can initiate a payment, check the status of payments and receipt of payments as well as view your reports.

For payment functions, start by selecting a line item from the list to the left of this message.

**Available** - Invoice is ready for payment initiations  
**Failed** - One or more items has an unsuccessful payment attempt  
**Incomplete** - One or more items have not been paid  
**Pending** - All line items have been initiated successfully  
**Successful** - All line items have been paid successfully



# CGDP Portal DPP-Sponsors

## Home Tab – Select Reporting Period

Populate the Select radio button corresponding to a specific distributed invoice line in the **Home Filter Results region**.

In the following example, the distributed invoice for the reporting period of 201403 is selected in the **Home Filter Results region**. Note that now the **Payments, Completed** and **Receipts** tabs are available for selection.

[Contact Us](#) | [My Profile](#) | [Logout](#) | [Help](#) | [Reporting](#)

[Home](#) | [Payments](#) | [Completed](#) | [Receipts](#) | [Reports](#)

### Sponsor Portal Coverage Gap Discount Program

Parent Org. ID: S#### | Contract Number: H#### | Reporting Period: ANY | Status: ANY

Parent Org. ID	Contract Number	Reporting Period	Status	Select
S####	H####	201401	Available	<input type="radio"/>
S####	H####	201402	Available	<input type="radio"/>
S####	H####	201403	Available	<input checked="" type="radio"/>

Welcome to Coverage Gap Discount Portal where you can initiate a payment, check the status of payments and receipt of payments as well as view your reports.

For payment functions, start by selecting a line item from the list to the left of this message.

**Available** - Invoice is ready for payment initiations  
**Failed** - One or more items has an unsuccessful payment attempt  
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**Pending** - All line items have been initiated successfully  
**Successful** - All line items have been paid successfully



# CGDP Portal DPP-Sponsors

## Select Available Tab to Review Invoices

Select one of the following tabs to review invoice line items associated with the selected reporting period : **Payments** tab, **Completed** tab, **Receipts** tab or the **Reports** tab.

In the following example, the **Payments** tab has been selected and displays the reporting period of 201403.

**Sponsor Portal** **CGDP Payments** Invoiced Reporting Period: 201403

P Number: ANY Parent Org. ID: S#### Contract Number: H####

Initiate All

P Number	Invoiced Amt.	Previous Deferred Amount	Payment Date	Initiate Payment	Defer	Failed
P####	284.54	0.00	01/12/2015	<input type="checkbox"/>	<input type="checkbox"/>	
P####	691.19	0.00	01/12/2015	<input type="checkbox"/>	<input type="checkbox"/>	
P####	23.69	0.00	01/12/2015	<input type="checkbox"/>	<input type="checkbox"/>	
P####	167.56	0.00	01/12/2015	<input type="checkbox"/>	<input type="checkbox"/>	
P####	714.68	0.00	01/12/2015	<input type="checkbox"/>	<input type="checkbox"/>	
P####	2.50	0.00	01/12/2015	<input type="checkbox"/>	<input type="checkbox"/>	
P####	96.41	0.00	01/12/2015	<input type="checkbox"/>	<input type="checkbox"/>	

Update All 01/12/2015

**Pending Transactions**

P Number	Authorization Amt.	Date Submitted	Payment Date	Stop Payment
No data				

**Payment Information**

Total Invoiced	1980.57
Total Failed	0.00
Total Deferred	0.00
Total Pending	0.00
Total Successful	0.00
Total Available	1980.57

**Payment Initiation Upload**

# *CGDP PORTAL DPP- SPONSORS*



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*Training Review*



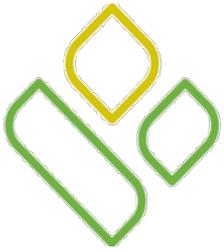
# CGDP Portal DPP-Sponsors Training Review

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In this training session you have learned about the CGDP Portal DPP – Sponsors **Home** tab.

This training introduced you to the following topics:

1. First look introduction of the **Home** Tab
2. **Home** Tab Regions
  - **Tabbed region – Home**
  - **Home Filter region**
  - **Home Welcome Message region**
  - **Home Filter Results region**
  - **Home Status Definitions region**
3. Work Instruction for utilizing the **Home** tab functionality



# CGDP Portal DPP-Sponsors **Questions**

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Questions?

