

SAMPLE Education Activity Report (EAR) COVER SHEET

Education Activity Report
Provider Customer Service Program
Contract Year (mm/dd/yy-mm/dd/yy)¹

Contractor Name
Contractor Number
Contractor Type (Carrier, FI, DME MAC or A/B MAC (if A/B MAC or
DME MAC, include Jurisdiction))
Contractor Address
Contractor Web Address

EAR Coordinator: Name, Title
Telephone number
E-mail address

¹ For legacy Title XVIII contractors, the “contract year” is the Federal Fiscal Year.

Revised 8/14/09

Education Activity Report

Carriers / Fiscal Intermediaries / DME MACs / A/B MACs

Introduction/Background

Contractors shall prepare a semi-annual Education Activity Report (EAR). The EAR summarizes the contractor's provider education and training activities during the reporting period defined in IOM Pub 100-09, Chapter 6. These activities recount the contractor's previous activities to improve three major components: Provider Outreach and Education (POE), Provider Contact Center (PCC), and Provider Self-Service Technology (PSS). The report shall highlight how the contractor leveraged the integration of their POE, PCC and PSS functions to achieve this result. In addition, the report shall outline how the contractor supported the PCSP activities while taking into consideration its individual goals and unique characteristics of its jurisdiction.

Guidance/Instructions for Reporting

The first report, which contains information about Provider Outreach & Education (POE) activities in months 1-6 of the contract year, will be due to CMS on the 30th day after the first six months of the contract year. The second report, covering the months 7-12 of the contract year, is due 30 days after the last day of the contract year. If the 30th day falls on a weekend or holiday, the report will be due at close of business on the next business day. All EARs shall be sent electronically in MS Word to ProviderServices@cms.hhs.gov with a subject line of "EAR/Contractor Name." A/B Medicare Administrative Contractors (MACs) and DME MAC contractors shall submit the EAR to their respective CMS Project Officer in accordance with the instructions for submitting deliverables in the MAC Statement of Work.

For the purposes of this report, the term "provider" references any organization, institution, or individual that offers health care services to Medicare beneficiaries and is meant to include suppliers.

The EAR must address the following:

- A. Data Analysis
 - 1. Error Rate Analysis
 - 2. Inquiry Analysis
 - 3. Claims Submission Analysis
 - 4. Quality Assurance Data Analysis
 - 5. Provider Feedback Analysis
- B. Coordination with Other Entities
- C. Technology
- D. Internal Staff Development and Training
- E. Provider Outreach and Education Activities
- F. Other PCSP Activities

A. Data Analysis

Just as the PCSP integrates the contractor's POE, PCC and PSS, data analysis shall have been performed in a way that produced results for each of these individual components, as well as for the overall success of the PCSP. At a minimum, the results of the contractor's data analysis program shall have been used to:

- Create and update website content, including Frequently Asked Questions (FAQs)
- Create and update Interactive Voice Response (IVR) messages
- Develop training topics/materials for Customer Service Representatives (CSRs), correspondents and POE staff
- Develop training topics/materials for providers
- Develop agenda items for "Ask the Contractor" Teleconferences (ACTs) and POE Advisory Group (AG) meetings
- Increase website satisfaction survey scores
- Increase listserv registration
- Improve accuracy of CSR and correspondent responses

1. Error Rate Analysis

- a. Provide your Comprehensive Error Rate Testing (CERT) Program error rate(s) from the November report, *if available*.
- b. Provide your CERT error rates(s) from the May report, *if available*.
- c. List the data sources employed to analyze error rates.
- d. Based on your analysis, did you correctly predict the errors incurred for this reporting period?
 - i. If yes, what steps did you do to take to seek changes?
 - ii. If no, what changes are you making to improve your data analysis?
- e. What steps did you take to predict future errors?
- f. How did your approach change based on the actions taken during the reporting period, as well as what prompted these changes?
- g. Share your successes/failures for this reporting period.
- h. Summarize types of training courses held in response to error rate analyses.
- i. Discuss provider education completed in response to Recovery Audit Contractor (RAC) findings, *if applicable*.

2. Inquiry Analysis

- a. Based on your top five inquiry categories (both telephone and written) what changes/updates (if any) did you make to your website content, including FAQs, etc.?
- b. Did you create/update your IVR messages this reporting period? If yes, what was the reason for this action?
- c. Based on your top five inquiry categories, what type of training topics/materials were created for providers?

- d. What training topics/materials for CSRs, correspondence and POE staff were created based on your top five inquiry categories?
- e. How has your training changed from past years?
- f. What type of changes are you making to improve listserv registration?
- g. What are you doing to improve the accuracy of CSR and correspondent responses?

3. Claims Submission Analysis

- a. Based on your claims submission data in your data analysis program (e.g., claims submission errors, remittance advice reports, medical review referrals), etc., what changes did you make to your PCSP?
- b. Show how your plans tie to the claims data analysis performed;
- c. How did you measure the effectiveness of the activities conducted as a result of your analysis of the above data?

4. Quality Assurance Data Analysis

- a. How did you incorporate the results of Quality Call Monitoring (QCM) data, Quality Written Correspondence Monitoring (QWCM) data, direct and remote monitoring data, etc?)
- b. How did you measure the effectiveness of the activities conducted as a result of your analysis of quality assurance data.
- c. How did you measure the effectiveness of the activities conducted as a result of your analysis of the above data?

5. Provider Feedback Analysis

- a. Based on your quality assurance tools used in your provider training (e.g., surveys, pre- and post-testing, training evaluations) etc., what did you do to improve your PCSP to ensure provider satisfaction?
- b. Will you use the same tools in the next reporting period to measure the effectiveness of POE AG meetings and ACTs?
- c. Briefly describe activities undertaken as a result of your most recent Medicare Contractor Provider Satisfaction Survey (MCPSS) findings.

The elements listed above shall not be construed as an all-inclusive list. If the contractor performed additional data analysis that does not fit into any of the defined categories, the contractor shall include an additional section explaining the data used and how it added to the overall success of the PCSP.

B. Coordination with Other Entities

- 1. Explain partnering efforts with other entities (internal and external) and summarize your level of involvement. Briefly discuss how these partnerships helped to create an environment to exchange information with other contractors and entities.
- 2. Report accomplishments that resulted from these partnerships.

C. Technology

1. Explain the technology and web enhancements used to disseminate Medicare Provider information. In what ways have these enhancements proven to be successful in improving your website satisfaction score, if any?
2. Discuss enhancements that were incorporated that may affect the website accessibility score for the reporting period.
3. Explain the approach to marketing self service technology.
4. Explain efforts to promote the listserv.

D. Internal Staff Development and Training

1. Summarize the type of internal training sessions held for the PCSP staff during the reporting period.
2. Discuss how training topics were selected for the PCSP staff.
3. Discuss other departments involved in the training.
4. Discuss the effectiveness of the training based on feedback received from the evaluations.

E. Completed Provider Outreach and Education Activities

1. Please complete the chart using the codes below.

Event Type**	Major Topics	Rationale for selecting topics***

****Event types**

- ACT = “Ask-the-Contractor” Teleconference
- N = New Provider Training
- O = 1:1 Training
- POE-AG = POE Advisory Group Meeting
- P = Presentation at Association Meeting or Other functions/
- PP = Partnerships with other contractors
- S/W = Seminar/Workshop
- SP = Training Tailored to Small Providers
- T = Teleconference
- OT = Other, please specify

*****Rationale for selecting topics**

- PFB = Provider feedback

POL = Policy and procedure change
DA = Data Analysis
CT = CERT error rate(s)
OTH = Other, please specify

2. Briefly describe the survey results of your educational activities.

G. Other PCSP activities

Summarize what, if any, additional activities or efforts not previously discussed, were implemented during the reporting period. The above is not an all-inclusive list.