Making it Easy to Submit your Credit Balance (CMS-838) Report!

Are you tired of…

…questioning whether CGS received your Credit Balance report through the mail or fax?

…rushing to get your Credit Balance report submitted timely?

…worrying that a payment hold will be activated, so you submit duplicate Credit Balance reports?

If you answer yes to any of these question, consider using myCGS to submit your Credit Balance report and save time and money! myCGS provides you with immediate confirmation that CGS has received your report. In addition, you can check the status to see if your report has been processed.

Step 1: Access the Forms tab and select 'Financial Forms' from the **Go To Page** drop down menu.

Step 2: Select 'CMS 838 Credit Balance' from the **Select a Form** drop down menu. The myCGS Credit Balance form will display.

Step 3: In the 'Provider Information' section:

- Select the quarter end date from the **Quarter End** drop down menu; and
- Check one item from the list: Qualify as a Low Utilization Providers; The Credit Balance Report Detail Page(s) is attached; or There are no Medicare credit balances to report for this quarter (No Detail Page(s) attached).

Step 4: In the 'Attachments' section:

- Attach up to 5 documents in a PDF format (each up to 5MB in size).
- **NOTE: CMS regulations prevent CGS from accepting electronic signatures; therefore, the first attachment must be the signed CMS-838 Credit Balance.**

Step 5: In the 'Electronic Signature' section:

- Enter the name of the person authorized to submit the form on behalf of your facility
- Enter the title of the person submitting the form
- Enter the name and telephone number of someone CGS can speak with should we have questions
- Check the box certifying the form and attachments are accurate
- Select **SUBMIT**

After submitting, you will receive a message under the 'Messages' tab confirming receipt of the Credit Balance Report. Within 24 hours, a second message will be sent to provide an assigned Submission ID and instructions on how to check the status.

No more questioning, rushing, or worrying! For additional information, please refer to the following sections of the *myCGS User Guide*.

- **Chapter 7: Forms Tab**
  https://www.cgsmedicare.com/pdf/mycgs/chapter7.pdf

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