

Readiness Checklist



Medicare Transaction Facilitator

This checklist is designed to help Dispensing Entities (DEs) and Third-Party Support Entities (TPSEs) prepare for the Medicare Transaction Facilitator (MTF) go-live on **January 1, 2026**. Please review and complete all applicable items to ensure a smooth transition and uninterrupted processing of Medicare Maximum Fair Price (MFP) refunds.



MTF Data Module (DM) Enrollment & Status

- ☐ Is your organization enrolled in the MTF DM and have you certified your enrollment?
- ☐ Have you received email confirmation of your MTF DM enrollment?



Account Access & User Management

- ☐ Are you able to successfully log in to the MTF?
- ☐ Is your organization's information current in the MTF?
- ☐ Have you added multiple users to your organization's MTF account?
- ☐ Are user roles and permissions within the MTF properly assigned and documented?
- ☐ Have all users within your organization who have permissions to access the MTF verified their ability to log in successfully?



Payment & Remittance Setup

- ☐ Have you verified that your banking information (routing and account numbers) is correct and current in the MTF?
- ☐ Have you verified your organization's Electronic Funds Transfer (EFT) enrollment?
- ☐ Is your organization's Tax Identification Number (TIN) correct in the system?
- ☐ Have you verified that your payment preference (to your organization or TPSE) is correct and current?
- ☐ Have you verified that your organization's selected payment method (electronic vs. paper check) reflects your current preference? (Please be aware that electronic payments will be faster and more efficient than paper checks.)
- ☐ Have you confirmed your organization's Electronic Remittance Advices (ERAs) and 835 delivery settings in your MTF enrollment, including whether you or a TPSE will receive your ERAs?
- ☐ Do you know who will be accessing your organization's Electronic Remittance Advices (ERAs) and how they will access them?

TPSE Associations (if applicable)

- ☐ Have you verified that your organization's TPSE selections, if applicable, are correctly aligned and confirmed?
- ☐ Have you confirmed with your selected TPSE(s) that they have completed and certified their enrollment?



Testing & Technical Readiness

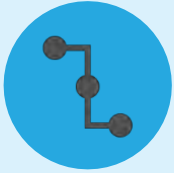
- ☐ Has your organization used the MTF DM to generate, review, and successfully process a test 835 remittance file?
- ☐ Can your organization's system properly parse and import 835 files?
- ☐ Have you tested your organization's Electronic Remittance Advice (ERA) retrieval process?
- ☐ Have you set up the Command Line Interface (CLI) tool for ERA retrieval automation?

- ☐ Have you considered how the MTF will interact with your organization's existing systems?
- ☐ Are your organization's firewall and security settings configured to allow MTF communications? (Work with your IT department or system vendor if needed)
- ☐ Has your organization whitelisted necessary MTF IP addresses and domains? (Please work with your IT department or system vendor if needed)



Operational Preparedness

- ☐ Have you established a workflow for handling and processing incoming MTF refunds?
- ☐ Have you trained relevant staff on MTF procedures?
- ☐ Is there a designated person responsible for MTF oversight?
- ☐ Have you integrated MTF refund tracking into your accounting system?



TPSEs: Associations and Authorizations

- ☐ Have all your dispensing entity associations been established, confirmed, and kept current in the MTF?
- ☐ Are all dispensing entity associations current with no expired authorizations?
- ☐ Do you have correct permissions to act on behalf of each dispensing entity?
- ☐ Have you verified that the information for each dispensing entity is current?
- ☐ Have you confirmed communication protocols with each dispensing entity?



TPSEs: Payment & Remittance Management

- ☐ Can you access and retrieve ERAs for all your associated dispensing entities?
- ☐ Do you have a system for distributing payment funds to your organization's associated dispensing entities?
- ☐ If providing payment support, have you confirmed your organization's bank account information is accurate and up to date?
- ☐ Can your organization's system properly parse and import 835 files for multiple dispensing entities?
- ☐ Have you tested your ERA retrieval process for multiple dispensing entities?
- ☐ Have you verified that your organization's system can handle bulk/batch processing for multiple dispensing entities?
- ☐ Have you validated that your organization's system can segregate and report remittance data by dispensing entities?



Help Desk

For MTF Help Desk application and technical support, including additional resources, live chat support, and 24/7 online ticket submission:

- Visit the [MTF Help Desk](#) website.
- Contact the MTF Help Desk at either 877-MTF-4HLP (877-683-4457), available 7:00 AM to 7:30 PM Eastern time, or MFPMedicareTransactionFacilitator@cms.hhs.gov.



Additional Resources

- If you have questions about how to update your NCPDP AccessOnline Pharmacy Database data, visit the [NCPDP website](#) or contact pharmacyhelp@ncdpd.org.
- If you have questions about CMS Identity Management, view the [CMS IDM Documentation](#) webpage.
- For additional information and support for dispensing entities and TPSEs, visit the [Pharmacy and Dispensing Entity Resources](#) webpage.
- For additional policy guidance on the Medicare Drug Price Negotiation Program, view the [Medicare Drug Price Negotiation Program Final Guidance for 2027 and Manufacturer Effectuation of the Maximum Fair Price in 2026 and 2027](#) memorandum.