Medicare Secondary Payer Recovery Portal (MSPRP)

Go Paperless Webinar

April 13, 2022

Presentation Overview

- Benefits of Go Paperless
- Process Overview
- Getting Set Up
- How Go Paperless Works on the MSPRP
- Additional Resources

Benefits

Process Overview

Section 111 Reporting Process

- Initial Opt-In
- Opt-Out

MSPRP

- View Correspondence
- Manage Email Notification Settings

Important Note: Because the set up of Go Paperless will be opted into via Section 111 reporting, Beneficiaries and Attorneys cannot currently opt in to Go Paperless.

Responsibilities

User of the COBSW S111 Portal:

- Initial opt-in
- Opt-out if needed

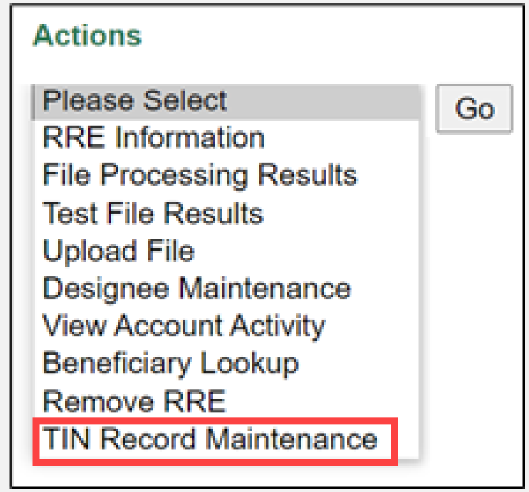
Account Manager (AM) of the MSPRP:

- Maintaining/updating email address for: Yourself, ADs assigned to the account, and any additional people or distribution lists added to the account
- Logging in regularly to the MSPRP to review correspondence

Setup: Opt-In

- Opting in (or out) of the paperless option will be done via the Section 111 reporting process.
- This means that you must be an insurer or their recovery agent in order to Go Paperless.
- Opting in to Go Paperless can be done in two ways:
  - S111 COBSW
  - TIN Reference File Submission

Setup: COBSW



Actions
Please Select
RRE Information
File Processing Results
Test File Results
Upload File
Designee Maintenance
View Account Activity
Beneficiary Lookup
Remove RRE
TIN Record Maintenance
Go

TIN Record Maintenance – Search
Enter the taxpayer Identification number (TIN) you wish to update and click "Go".
Enter "Cancel" to return to the RRE Listing page.
TIN:
Office Code:
Go
Cancel
QUICK HELP
Help About This Page
Print this page

Setup: COBSW 2

TIN Record Maintenance

Update the TIN Record as needed below. Required fields are identified with a red asterisk (*).

Click "Submit" to validate the address entries and advance to the Confirmation page.

Click "Cancel" to return to the TIN Record Maintenance - Search page.

QUICK HELP
Help About This Page

Print this page

TIN:	##-########
Office Code:	0
RRE Foreign Address?*	○ Yes ◉ No
TIN/Office Code Mailing Address Line 1: *	123 Main St.
TIN/Office Code Mailing Address Line 2:	Suite 100
TIN/Office Code City: *	City
TIN/Office Code State: *	State
TIN/Office Code Zip Code: *	##### - 0101
TIN/Office Code Paperless Indicator:	☑

Recovery Agent fields (other than Recovery Agent Mailing Address 2) are required when an entry has been made into any one of the Recovery Agent fields.

Recovery Agent Mailing Name:	123 Main St.
Recovery Agent Mailing Address Line 1:	123 Main St.
Recovery Agent Mailing Address Line 2:	Suite 100
Recovery Agent Mailing City:	City
Recovery Agent Mailing State:	State
Recovery Agent Mailing Zip Code:	##### - 0101
Recovery Agent Paperless Indicator:	☑
Recovery Agent TIN:	##########

Submit Cancel

Setup: COBSW 3

TIN Record Maintenance

QUICK HELP
Help About This Page

Print this page

Update the TIN Record as needed below. Required fields are identified with a red asterisk (*).

Click "Submit" to validate the address entries and advance to the Confirmation page.

Click "Cancel" to return to the TIN Record Maintenance - Search page.

TIN:	##-#######
Office Code:	0
RRE Foreign Address?*	○ Yes ◉ No
TIN/Office Code Mailing Address Line 1: *	123 Main St.
TIN/Office Code Mailing Address Line 2:	Suite 100
TIN/Office Code City: *	City
TIN/Office Code State: *	State
TIN/Office Code Zip Code: *	##### - 0101
TIN/Office Code Paperless Indicator:	☑

Recovery Agent fields (other than Recovery Agent Mailing Address 2) are required when an entry has been made into any one of the Recovery Agent fields.

Recovery Agent Mailing Name:	123 Main St.
Recovery Agent Mailing Address Line 1:	123 Main St.
Recovery Agent Mailing Address Line 2:	Suite 100
Recovery Agent Mailing City:	City
Recovery Agent Mailing State:	State
Recovery Agent Mailing Zip Code:	##### - 0101
Recovery Agent Paperless Indicator:	☑
Recovery Agent TIN:	##########

Submit Cancel

Setup: TIN Reference File Submission

Field	Name
23	TIN/Office Code Paperless Indicator
24	Recovery Agent Paperless Indicator
25	Recovery Agent TIN

How it Works: Email Notification
MSPCENTER@CMS.HHS.GOV

Dear Account Manager,

New correspondence has been generated for "Go Paperless" addresses associated to the account listed below. You may view this correspondence after logging in using Multi-Factor Authentication (MFA) at the following MSPRP URL: https://www.cob.cms.hhs.gov/MSPRP/ .

Note: All account designees (unless deselected on the MSPRP) have been blind copied on this e-mail.

Account ID: 12345, Acme Insurance Company

Case ID	Correspondence Type
##############	Applicable Plan or Authorized Recovery Agent Response Forwarded to BCRC.
##############	Acknowledgement of payment and notice that a refund will be issued.
##############	Response regarding declaration of bankruptcy without submitting a request for Petition.

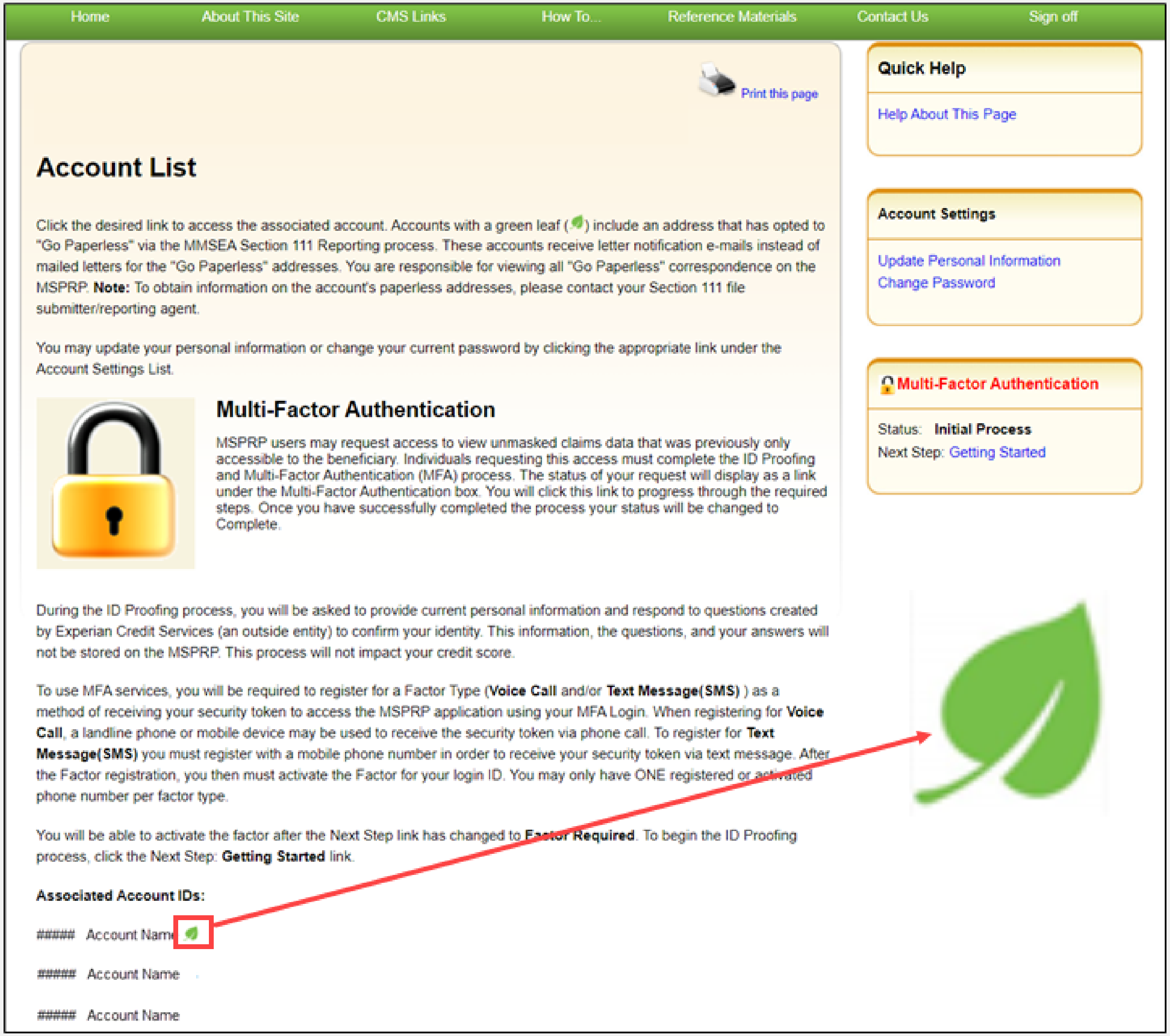
PLEASE DO NOT REPLY TO THIS MESSAGE.

This is a system-generated email. Replies will not be read or forwarded for handling.

Confidentiality Note:

This electronic message transmission is intended only for the person or entity to which it is addressed and may contain information that is privileged, confidential or otherwise protected from disclosure. If you have received this transmission, but are not the intended recipient, you are hereby notified that any disclosure, copying, distribution or use of the contents of this information is strictly prohibited. If you have received this e-mail in error, please contact the BCRC Electronic Data Interchange (EDI) Department at (646) 458-6740 and destroy the original message and all copies.

How it Works: Go Paperless Icon



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Account List

Click the desired link to access the associated account. Accounts with a green leaf ( ) include an address that has opted to "Go Paperless" via the MMSEA Section 111 Reporting process. These accounts receive letter notification e-mails instead of mailed letters for the "Go Paperless" addresses. You are responsible for viewing all "Go Paperless" correspondence on the MSPRP. **Note:** To obtain information on the account's paperless addresses, please contact your Section 111 file submitter/reporting agent.

You may update your personal information or change your current password by clicking the appropriate link under the Account Settings List.

Multi-Factor Authentication

MSPRP users may request access to view unmasked claims data that was previously only accessible to the beneficiary. Individuals requesting this access must complete the ID Proofing and Multi-Factor Authentication (MFA) process. The status of your request will display as a link under the Multi-Factor Authentication box. You will click this link to progress through the required steps. Once you have successfully completed the process your status will be changed to Complete.

During the ID Proofing process, you will be asked to provide current personal information and respond to questions created by Experian Credit Services (an outside entity) to confirm your identity. This information, the questions, and your answers will not be stored on the MSPRP. This process will not impact your credit score.

To use MFA services, you will be required to register for a Factor Type (**Voice Call** and/or **Text Message(SMS)**) as a method of receiving your security token to access the MSPRP application using your MFA Login. When registering for **Voice Call**, a landline phone or mobile device may be used to receive the security token via phone call. To register for **Text Message(SMS)** you must register with a mobile phone number in order to receive your security token via text message. After the Factor registration, you then must activate the Factor for your login ID. You may only have ONE registered or activated phone number per factor type.

You will be able to activate the factor after the Next Step link has changed to **Factor Required**. To begin the ID Proofing process, click the Next Step: **Getting Started** link.

Associated Account IDs:

Account Name

Account Name

Account Name

Quick Help

Help About This Page

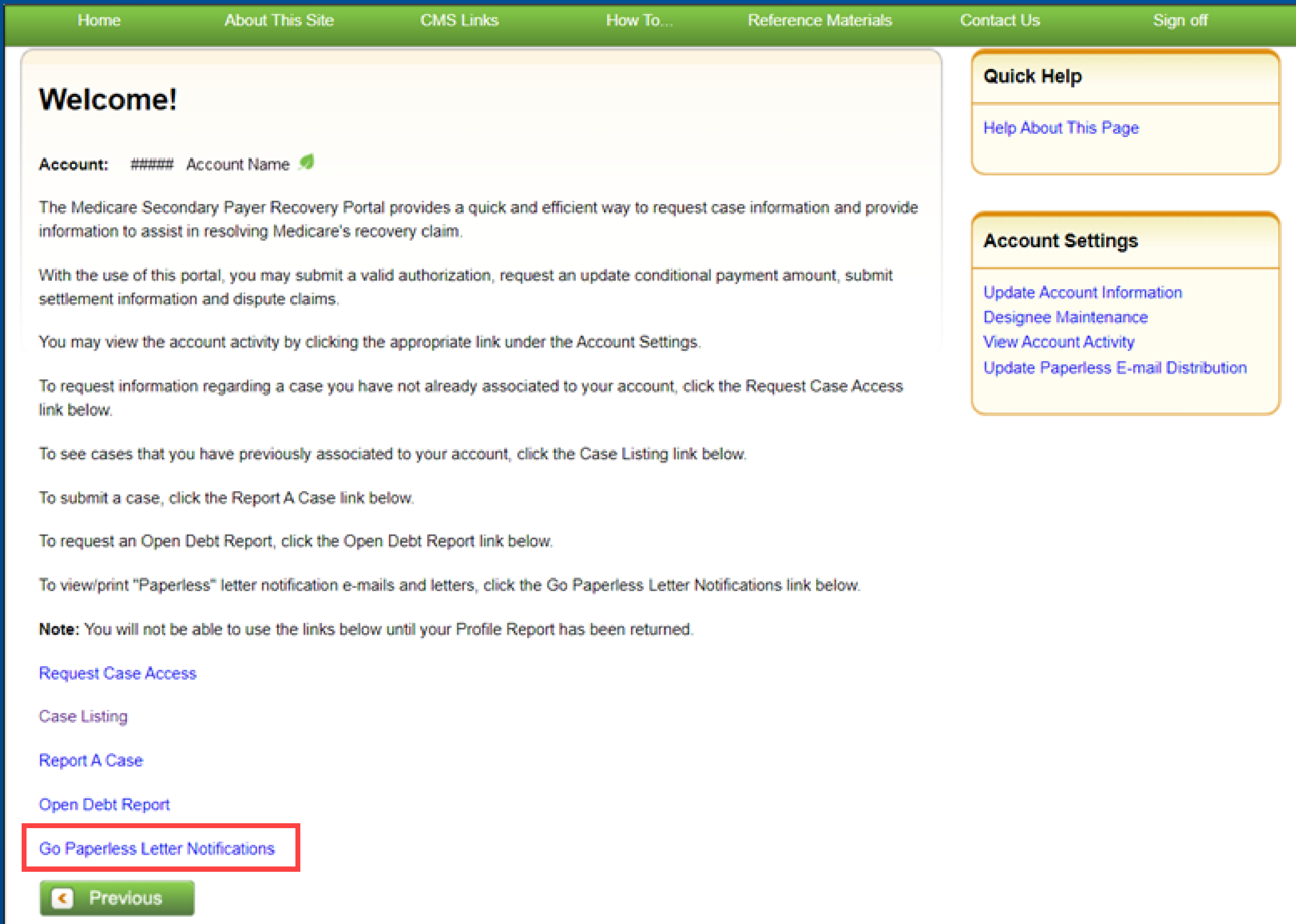
Account Settings

Update Personal Information
Change Password

Multi-Factor Authentication

Status: **Initial Process**
Next Step: Getting Started

How it Works: Viewing Letters and Notifications



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Welcome!

Account: ###### Account Name

The Medicare Secondary Payer Recovery Portal provides a quick and efficient way to request case information and provide information to assist in resolving Medicare's recovery claim.

With the use of this portal, you may submit a valid authorization, request an update conditional payment amount, submit settlement information and dispute claims.

You may view the account activity by clicking the appropriate link under the Account Settings.

To request information regarding a case you have not already associated to your account, click the Request Case Access link below.

To see cases that you have previously associated to your account, click the Case Listing link below.

To submit a case, click the Report A Case link below.

To request an Open Debt Report, click the Open Debt Report link below.

To view/print "Paperless" letter notification e-mails and letters, click the Go Paperless Letter Notifications link below.

Note: You will not be able to use the links below until your Profile Report has been returned.

Request Case Access

Case Listing

Report A Case

Open Debt Report

Go Paperless Letter Notifications

Previous

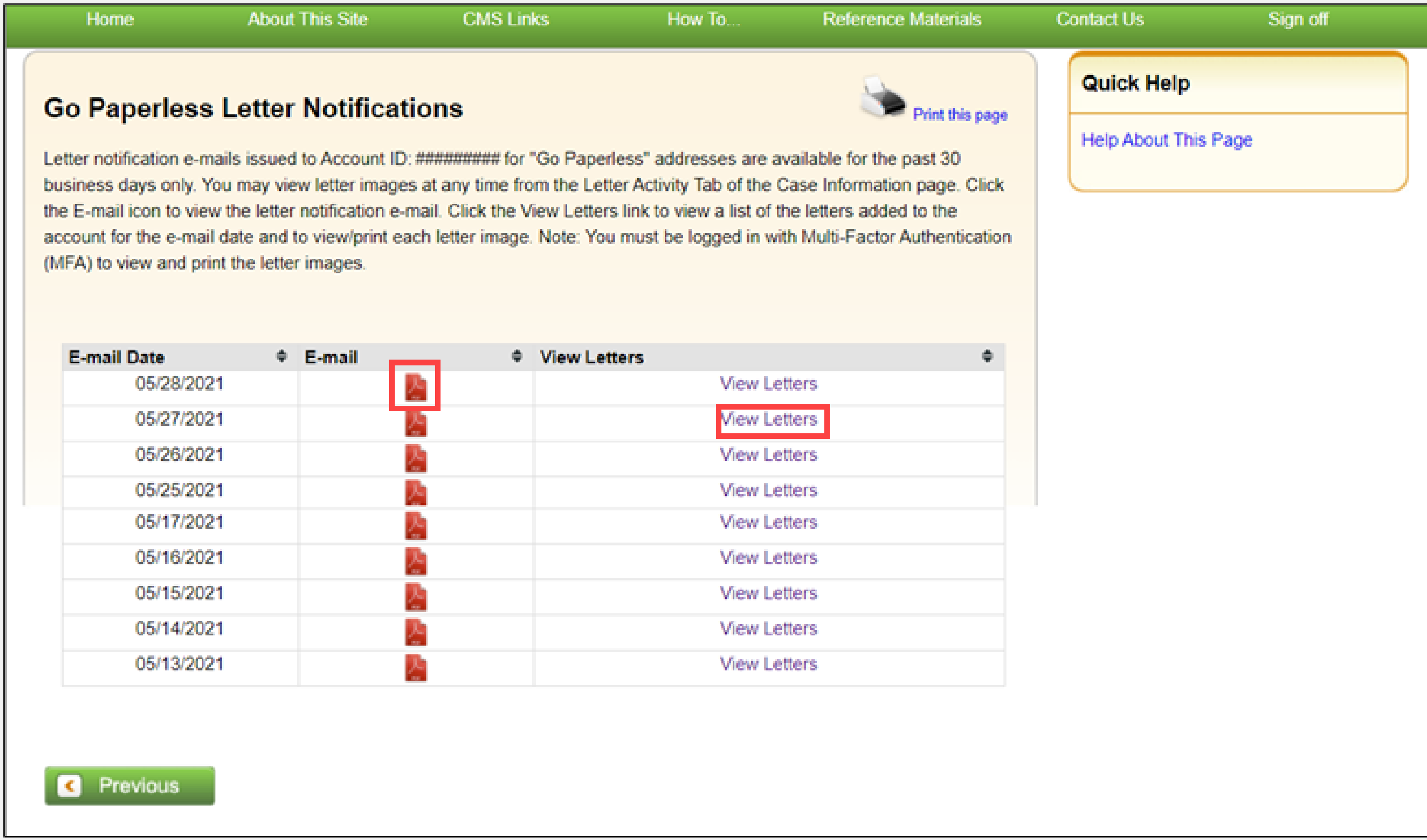
Quick Help

Help About This Page

Account Settings

Update Account Information
Designee Maintenance
View Account Activity
Update Paperless E-mail Distribution

How it Works: Viewing Letters & Notifications 2



How it Works: Viewing Letters & Notifications 3

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Letters for E-mail Date

Print this page

Account ID: #######, ABC Company **E-mail Date:** 5/22/2021

All "Go Paperless" account letters for the e-mail date are displayed on this page. If you have logged in with Multi-Factor Authentication, you will be able to view, print and save the letters for cases that you have access to. Click the **Associated Images** link to view/print individual correspondence. To save multiple/all documents to a folder, click the Select Letter check box/Select All link. You may save up to 100 MB (megabytes) at a time. When all letters have been marked, click **Continue**. Click **Previous** to return to the Go Paperless Letter Notifications page.

Select Letter	Case ID	Correspondence Type	Associated Images	Image Size
☐	################	Response to a submitted dispute	Image1.pdf	5 MB
☐	################	Medicare's Demand Letter	Image2.pdf	5 MB
☐	################	Notification of Decision Response	Image3.pdf	5 MB
☐	################	Medicare's Intent to Refer to Treasury Letter	Image4.pdf	5 MB

Select All / Deselect All

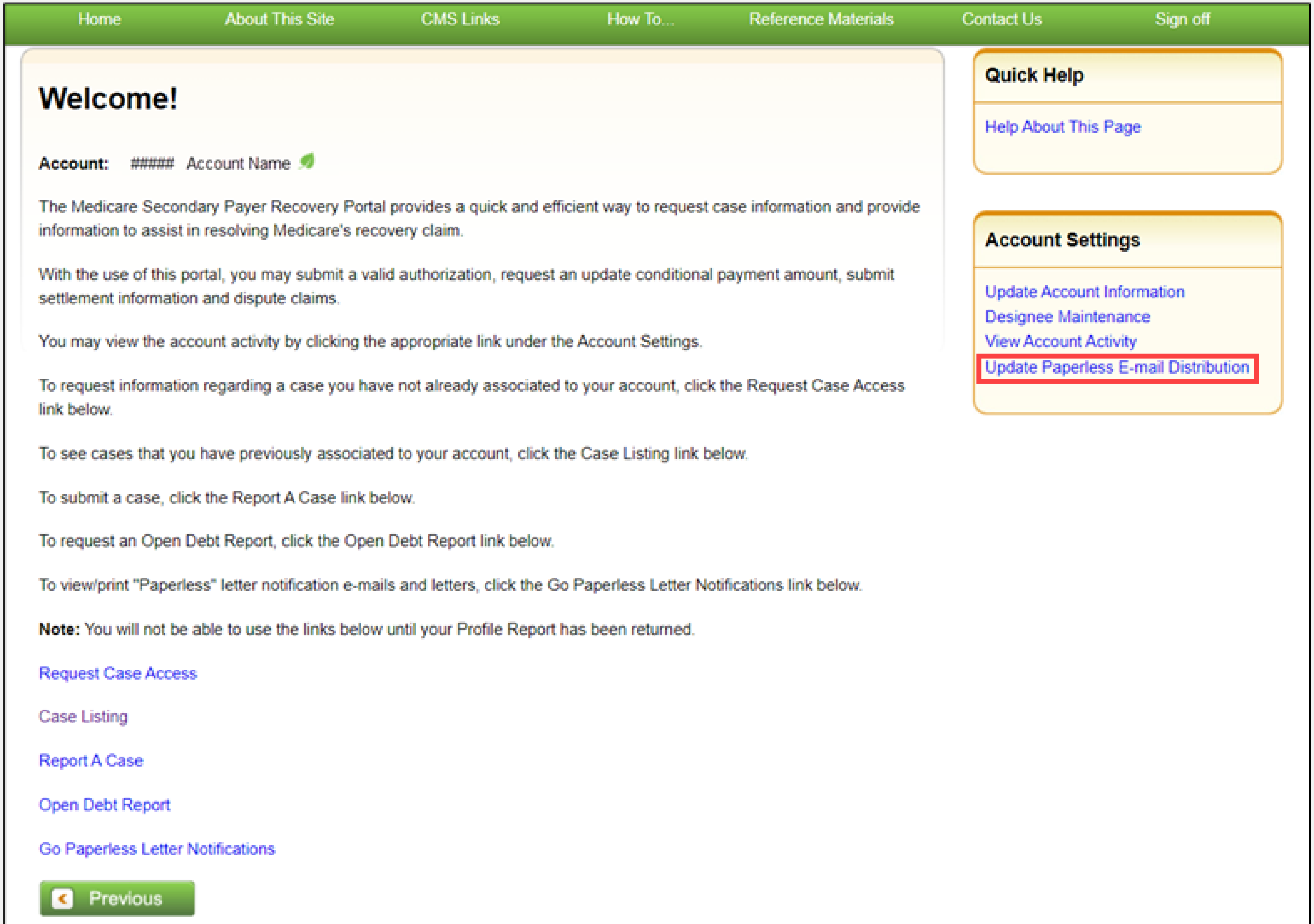
Note, download may take a few seconds after clicking Continue. Your zipped file will appear when it is ready.

Previous | Continue

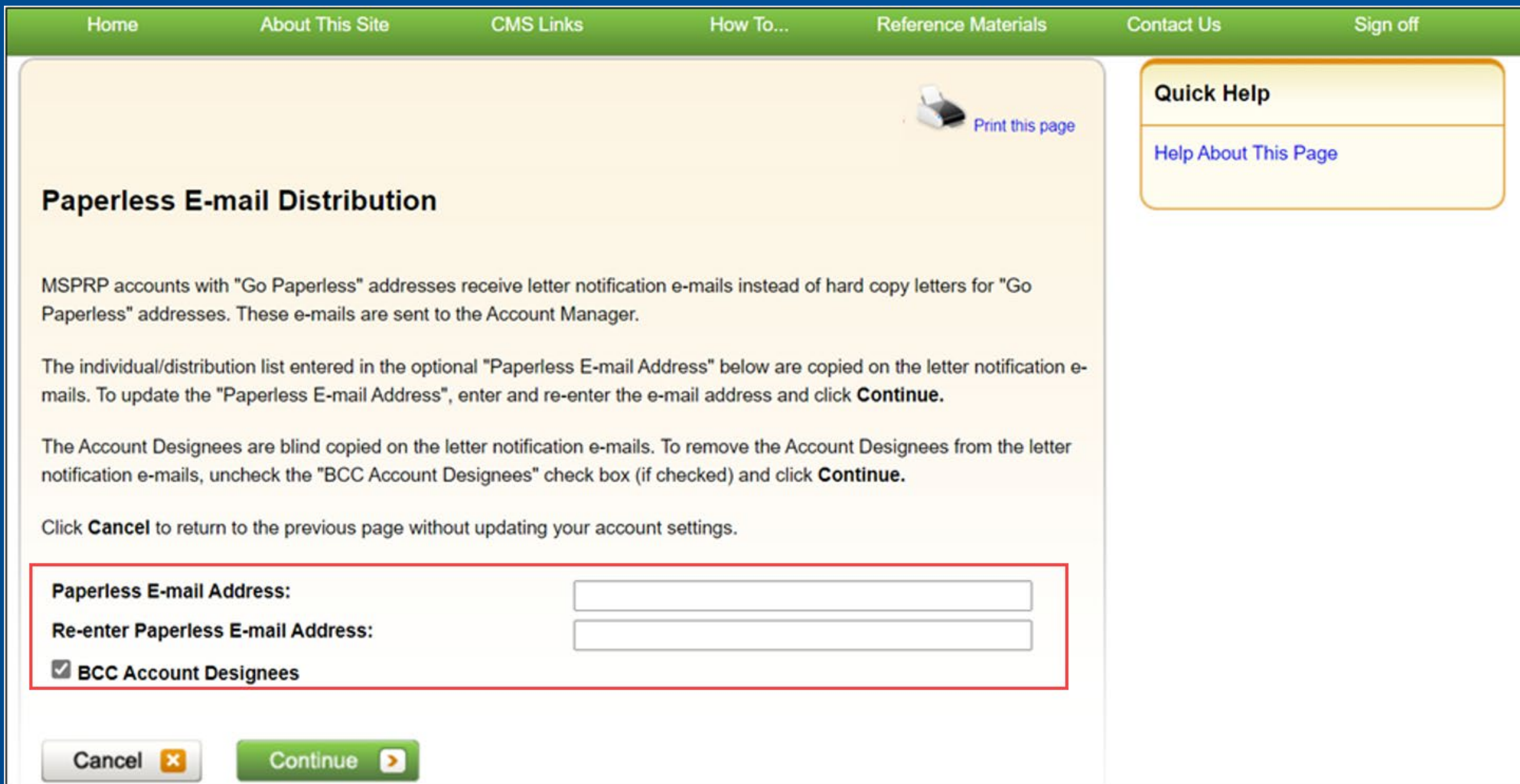
Quick Help

Help About This Page

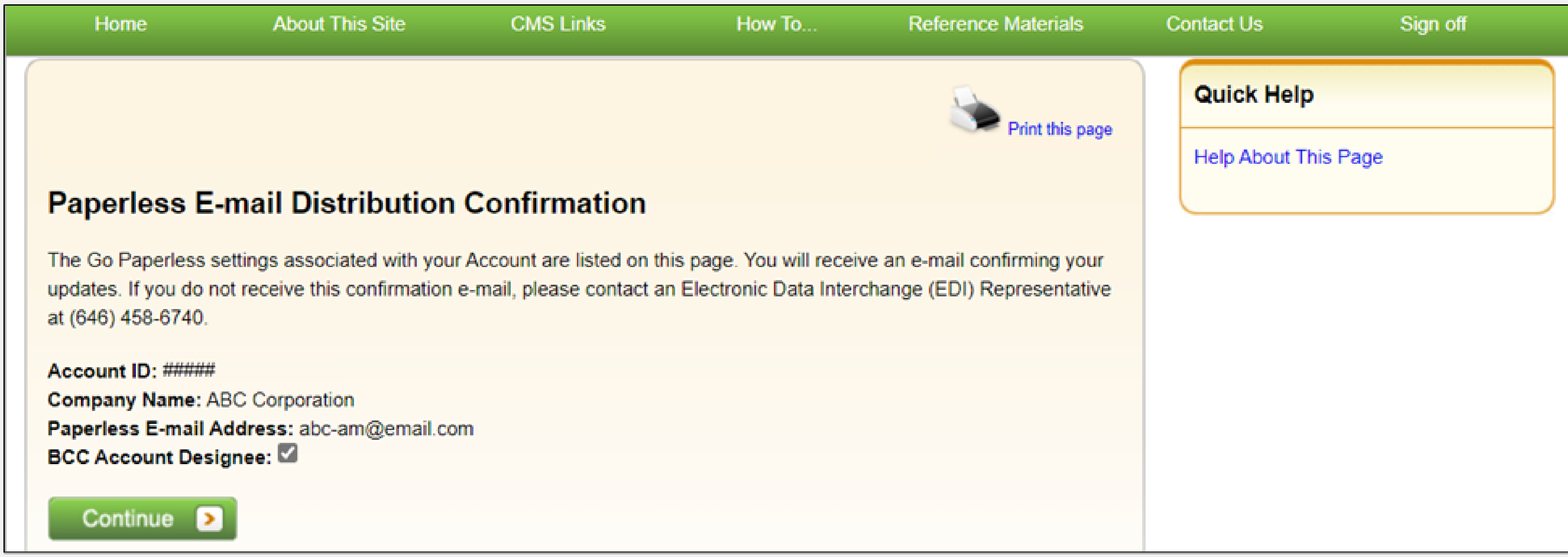
How it Works: Updating Paperless Email Distribution



How it Works: Updating Paperless Email Distribution 2



How it Works: Updating Paperless Email Distribution 3



Additional Resources

- The EDI Department is available for assistance with setup at (646) 458-6740.
- For recovery-specific questions, please contact the CRC or BCRC directly at 1-855-798-2627 (TTY/TDD: 1-855-797-2627 for the hearing and speech impaired) and follow the prompts.
- For additional information, please see the following resources:
  - NGHP User Guide
  - MSPRP User Guide
  - S111 COBSW User Guide

Questions & Answers

Slide 0: Medicare Secondary Payer Recovery Portal (MSPRP) Go Paperless Webinar

Slide 1: Presentation Overview

Welcome to the MSPRP Go Paperless webinar. Today we will be covering the benefits of Go Paperless, the opt-in process, how Go Paperless works on the MSPRP, and a list of additional resources, followed by the question-and-answer session.

Slide 2: Benefits

The recovery process has the potential to generate a lot of paper. The new Go Paperless feature on the MSPRP for corporate accounts is here to help. By opting in, Go Paperless stops paper mailings, so it reduces the amount of paper you handle and the number of documents that need to be scanned, and helps the environment. It also allows you to easily see all your recovery correspondence, including Demands, all in one place.

Insurers and their recovery agents will be able to opt in (or out) of Go Paperless using the Section 111 Reporting Process, which we will discuss in more detail shortly.

When the decision is made to opt in to the paperless functionality, all recovery correspondence will then be viewed directly on the MSPRP. It should also be noted that you can opt out at any time should you need to.

Using this new feature allows you to be notified by email that there is new correspondence available in the portal. These emails will be sent to the Account Manager (AM). Any Account Designees (ADs) will be automatically copied on these emails. The Account Manager will have the option to enter one additional individual or a distribution list to also be copied on the notification email. The AM can also choose to remove ADs from the email notifications.

Slide 3: Process Overview

Before we talk about how to get started, we want to be clear about the process and who is responsible for what when it comes to the setup and maintenance of a paperless account.

Because the setup of Go Paperless will be opted into (and potentially out of) via Section 111 reporting, and viewing and managing recovery correspondence will take place on the MSPRP, there are multiple roles involved in setup and maintenance. This also means that the paperless option is only available to insurers and recovery agents. Beneficiaries and attorneys cannot opt in to Go Paperless at this time.

Because the same person may not be doing both the opting-in and the managing of the MSPRP account, it will be important that the parties involved coordinate.

Slide 4: Responsibilities

For the users of the S111 portal account, the main responsibility is the initial Go Paperless opt-in for the tax identification numbers (TINs)/Office Codes associated to the account. It also includes opting out if needed. The AM should also make sure that the Go Paperless setting on the COBSW matches the Go Paperless fields on the TIN Reference File when submitted, which we will cover in more detail in a moment.

The AM of the MSPRP account is ultimately responsible for the account. This includes maintaining and updating all email addresses for the account including their own, the ADs and any additional emails or distribution lists added to the account. The AM should also be regularly logging in to view correspondence on the MSPRP.

It is important that the MSPRP AM is actively following the account activity in the MSPRP and acting accordingly on correspondence.

Slide 5: Setup: Opt-In

Now that we've talked about the main benefits of Go Paperless and who will be responsible for what, let's talk about how to get started.

Opting in to Go Paperless on the MSPRP will be done via the S111 reporting process. This means that currently only insurers and their recovery agents can Go Paperless. Other MSPRP users, such as attorneys and beneficiaries, cannot Go Paperless and will continue to receive paper correspondence.

Opting in can be done two ways. It can be done via the COBSW or via a Non-Group Health Plan (NGHP) TIN Reference File submission. Let's take a closer look at these options.

Slide 6: Setup: COBSW

The first option to opt in is via the Section 111 COBSW. You will do this on the TIN Record Maintenance page. This is a good opportunity to remind you about this page in general and its functions.

To begin, if you are an AM or AD in the COBSW, you may use the TIN Record Maintenance action on the RRE Listing page to access the TIN Record Maintenance – Search page. From this page, you can search for TIN records you wish to update.

Once you complete your search, the TIN Record Maintenance page will display and will be automatically populated with TIN address information for the RRE ID based on the TIN and office code you used in your search.

Slide 7: Setup: COBSW 2

As a reminder, the TIN Record Maintenance page is where you can update an address for any TIN associated with an RRE ID for your account. You just need to update the necessary fields and submit.

Please note that if you update any information on this screen, you must also update the information on your next TIN Reference File submission, or the change will be replaced with the information contained on the file.

Slide 8: Setup: COBSW 3

When there is an active MSPRP account for the RRE's TIN, you may also use this page to set Go Paperless options for the NGHP insurer or recovery agent address.

If you want to opt in for the TIN/Office Code address, select the TIN/Office Code Paperless Indicator checkbox.

To opt in the recovery agent, select the Recovery Agent Paperless Indicator checkbox and enter the Recovery Agent TIN.

Note that setting an insurer and/or the recovery agent to paperless occurs independently of each other. For the insurer, the TIN/Office Code Paperless Indicator will be disabled when the insurer's TIN does not match to an MSPRP account. For the recovery agent, the Recovery Agent Paperless Indicator is always enabled, but the entered recovery agent TIN must match an MSPRP account in order to set the recovery agent to paperless. This will be confirmed when the user clicks Submit.

If you do not want to opt in, simply leave these checkboxes unchecked. This is also where you would opt out if you had chosen to Go Paperless previously and need to opt out. You would simply uncheck these boxes.

Note that you should always make sure that the information in the COBSW, like addresses and Go Paperless status, doesn’t conflict with the information on your TIN Reference File.

Slide 9: Setup: TIN Reference File Submission

When there is an active MSPRP account for the RRE’s TIN, you may also use this page to set Go Paperless options for the NGHP insurer or recovery agent address.

If you want to opt in for the TIN/Office Code address, select the TIN/Office Code Paperless Indicator checkbox.

To opt in the recovery agent, select the Recovery Agent Paperless Indicator checkbox and enter the Recovery Agent TIN.

Note that setting an insurer and/or the recovery agent to paperless occurs independently of each other. For the insurer, the TIN/Office Code Paperless Indicator will be disabled when the insurer's TIN does not match to an MSPRP account. For the recovery agent, the Recovery Agent Paperless Indicator is always enabled, but the entered recovery agent TIN must match an MSPRP account in order to set the recovery agent to paperless. This will be confirmed when the user clicks Submit.

If you do not want to opt in, simply leave these checkboxes unchecked. This is also where you would opt out if you had chosen to Go Paperless previously and need to opt out. You would simply uncheck these boxes.

Note that you should always make sure that the information in the COBSW, like addresses and Go Paperless status, doesn’t conflict with the information on your TIN Reference File.

Slide 10: How it Works: Email Notification

Once you have designated your Go Paperless options, you will no longer receive paper correspondence for the TIN/Office address(es) that were opted in, and will begin receiving email notifications. This is a sample of what the Go Paperless email notification will look like. The email will provide basic information, like correspondence type, Case ID, and MSPRP Account ID. These emails will be sent to the AM and the ADs on the MSPRP account unless the AM chooses to remove the ADs from the distribution. Be aware that due to system processing, it can take up to 14 days to stop receiving mailed correspondence and to begin receiving the letter notification emails.

As a tip, be sure to mark these emails from MSPCENTER@CMS.HHS.GOV as being from a trusted sender so that you avoid them accidentally going into a junk folder.

It should also be noted that if an email to an Account Manager does bounce back as undeliverable, an email will go out to the Account Representative and Account Designees indicating that the email needs to be checked and updated if needed.

AMs and the Account Representative will also be notified via email when an account is opted in or out.

Slide 11: How it Works: Go Paperless Icon

Now that you know how to opt in and how you will be notified of new correspondence, let's look at the details of how Go Paperless works in the MSPRP.

All accounts that have selected the Go Paperless option can be identified by the Go Paperless green leaf image that will appear on various MSPRP pages. These include the Account List, Welcome, and Case Information pages. The icon will allow you to see which accounts and cases have opted in to Go Paperless.

This icon appears next to the account name, account ID, or case ID, depending on the page being displayed.

Note that this icon appears for the account if at least one TIN/Office Code associated to an MSPRP account is currently opted in to Go Paperless. The icon appears for a case when the MSPRP account is currently receiving letter notification emails instead of mailed letters for the case.

Slide 12: How it Works: Viewing Letters and Notifications

If you are the Account Manager (AM) or Account Designee (AD), you can view letter notification emails and letters sent to the account.

To view Go Paperless letter notification emails and letters, log in to the MSPRP. It is important to note that you must be logged in with Multi Factor Authentication (MFA) to view, print, and save the letters and their associated images. If you are not yet set up for MFA, you can find additional details on how to do so in the MSPRP User Guide.

From the Account List page, click the Associated Account ID for the paperless account you want to view.

The Welcome! page will appear. From there you can click the Go Paperless Letter Notifications link at the bottom of the page.

Note: This link only appears if you are an AM or AD viewing an account that is associated with at least one address that is opted in to Go Paperless or the account has at least one letter notification email that was sent within the last 30 business days.

Slide 13: How it Works: Viewing Letters and Notifications 2

After clicking the link, the Go Paperless Letter Notifications page will appear.

From this page, you can click on the PDF icon to view a PDF of the letter notification email in a new window. Or, if you want to view a list of letters that have been added to the account for the selected email date, you can click the View Letters link.

You can view letter notification emails and letters sent to the account within the last 30 days for Go Paperless addresses using this Go Paperless Letter Notifications page.

Note: If you are looking to do a bulk download of letters, you must do so from this page within the 30-day timeframe. Once letters are moved to the Letter Activity Tab, bulk download is no longer an option.

Slide 14: How it Works: Viewing Letters & Notifications 3

If you select the View Letter link, the Letters for E-mail Date screen will appear. From this screen you can download individual letters by clicking the hyperlinked filename in the Associated Images column to open a PDF of the associated letter image in a new window.

To download multiple letters, click one or more of the Select Letter checkboxes, or click the Select All link, and click Continue to save.

Also note that you may only save files of up to 100 MB (megabytes) total at one time.

Slide 15: Updating Paperless Email Distribution

Now let's look at the steps an AM would take to update who receives the paperless email notifications. If you need to make changes to who receives the paperless notification emails, you can do so on the Paperless E-mail Distribution page. From this page you can enter or update one additional email address for an individual or distribution list to receive letter notification emails. You can also choose for the ADs to not be included on these emails.

This page is reached by clicking the Associated Account ID for the paperless account you want to view from the Account List page. The Welcome! page will then display. Then click the Update Paperless E-mail Distribution link.

Slide 16: Updating Paperless Email Distribution 2

Once on the Paperless E-mail Distribution page you can enter the additional email address that you want to be copied on the letter notification emails, if any. This email address may be of an individual or a distribution list.

You can also deselect the BCC Account Designees checkbox if you do not want the ADs to be copied on the letter notification email, or select the checkbox if you want to stop the ADs, who are copied by default, from being copied.

Please note that the additional notification email address will receive the paperless notifications, but will only be able to access them on the MSPRP if they are an AM or an AD on the account.

Slide 17: Updating Paperless Email Distribution 3

Once you have made your updates and clicked Continue, you will see the Paperless E-mail Distribution Confirmation page where you can confirm your choices. You will receive a confirmation email with your changes. The Account Representative will also be copied.

Slide 18: Additional Resources

Lastly, today we wanted to leave you with some additional resources.

The EDI Department is available for assistance with setup at (646) 458-6740.

For recovery-specific questions, please contact the CRC or BCRC at 1-855-798-2627 (TTY/TDD: 1-855-797-2627 for the hearing and speech impaired) and follow the prompts.

For additional information, please refer to the NGHP, MSPRP, and COBSW User Guides.

Slide 19: Questions & Answers

That brings us to the question-and-answer portion of the call.

Acronyms

AD	Account Designee
AM	Account Manager
BCC	Blind carbon copy
COBSW	Coordination of Benefits Secure Website
EDI	Electronic Data Interchange
MFA	Multi-Factor Authentication
MSPRP	Medicare Secondary Payer Recovery Portal
NGHP	Non-Group Health Plan
PDF	Portable Document Format
TIN	Tax Identification Number
RRE	Responsible Reporting Entity