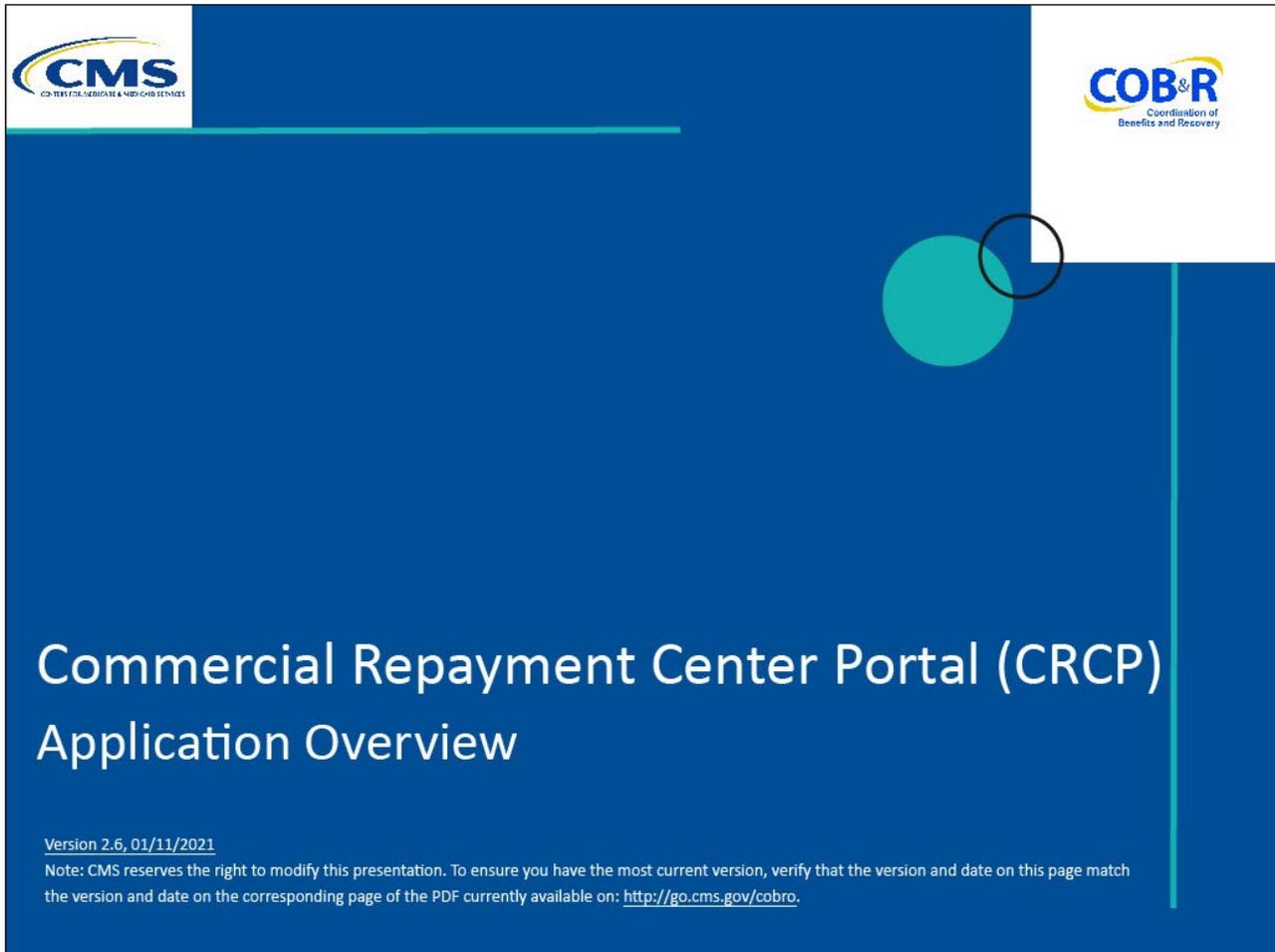


Application Overview

Slide 1 of 35 - Application Overview



CMS
CENTERS FOR MEDICARE & MEDICAID SERVICES

COB&R
Coordination of
Benefits and Recovery

Commercial Repayment Center Portal (CRCP) Application Overview

Version 2.6, 01/11/2021
Note: CMS reserves the right to modify this presentation. To ensure you have the most current version, verify that the version and date on this page match the version and date on the corresponding page of the PDF currently available on: <http://go.cms.gov/cobro>.

Slide notes

Welcome to the Commercial Repayment Center Portal (CRCP) Application Overview course. As a reminder, you may view the slide number you are on by clicking the moving cursor. Additionally, you can view the narration by clicking the CC button in the lower right-hand corner of the screen.

Disclaimer

While all information in this document is believed to be correct at the time of writing, this Computer Based Training (CBT) is for educational purposes only and does not constitute official Centers for Medicare & Medicaid Services (CMS) instructions. All affected entities are responsible for following the instructions in the CRCP User Guide found under the *Reference Materials* menu at the following link: <https://www.cob.cms.hhs.gov/CRCP/>.

Slide notes

While all information in this document is believed to be correct at the time of writing, this Computer Based Training or CBT is for educational purposes only and does not constitute official Centers for Medicare & Medicaid Services or CMS instructions.

All affected entities are responsible for following the instructions in the CRCP User Guide found under the Reference Materials menu at the following link: [CMS CRCP Website](https://www.cob.cms.hhs.gov/CRCP/).

Slide 3 of 35 - Course Overview

Course Overview

- CRCP Overview
 - View demand and case/beneficiary information
 - Respond to demands
 - Initiating an electronic payment

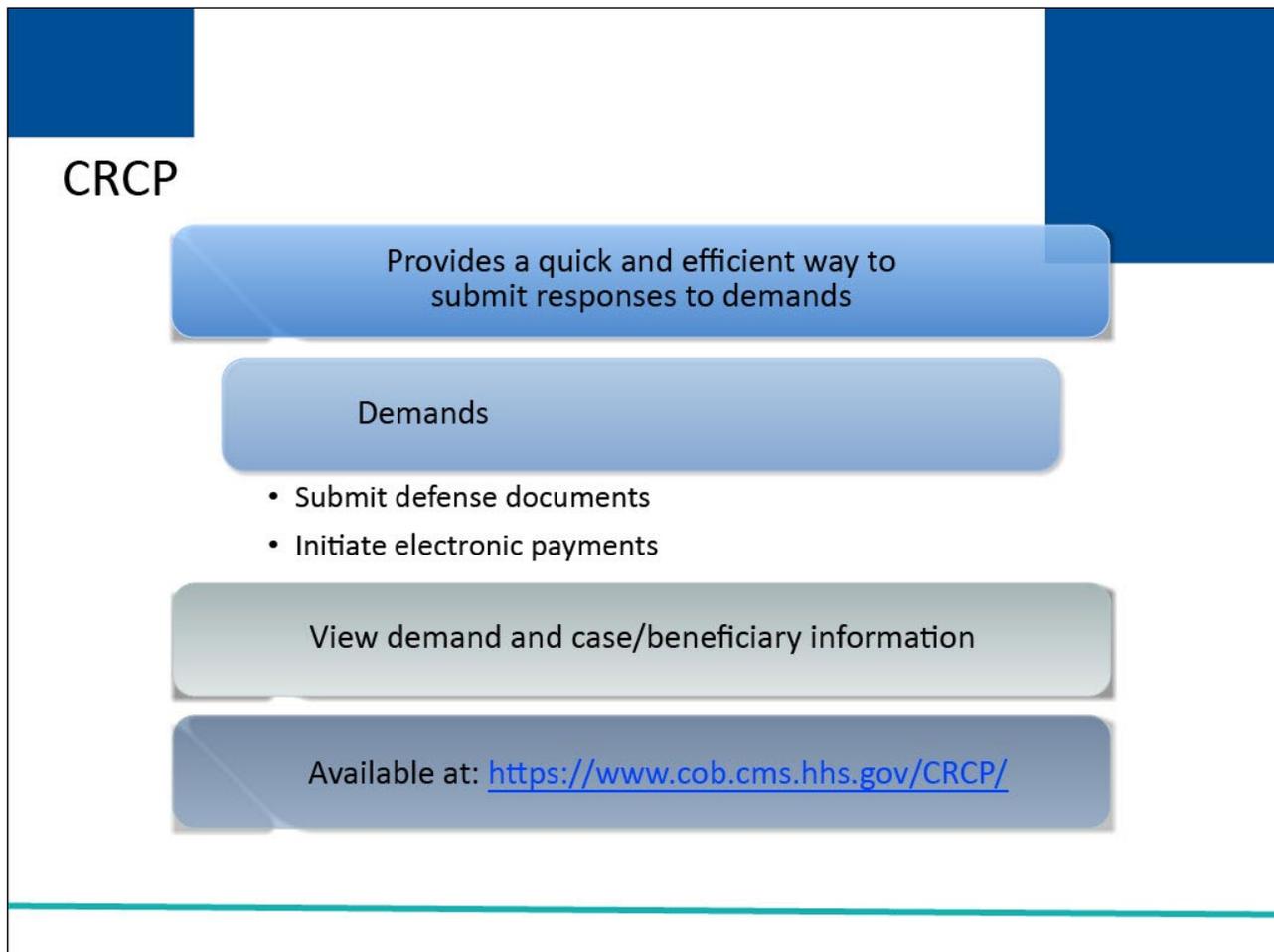


Slide notes

This course provides a brief overview on how the CRCP can be used to view demand and case/beneficiary information, respond to demands and initiating an electronic payment.

It includes summary level information on how to get started using the application as well as information on general navigation guidelines.

Slide 4 of 35 - CRCP

The slide features a white background with blue decorative bars at the top left and top right. The title 'CRCP' is in the top left. Below it are four blue rounded rectangular boxes. The first box contains the text 'Provides a quick and efficient way to submit responses to demands'. The second box is titled 'Demands' and contains a bulleted list: 'Submit defense documents' and 'Initiate electronic payments'. The third box contains the text 'View demand and case/beneficiary information'. The fourth box contains the text 'Available at: https://www.cob.cms.hhs.gov/CRCP/'.

CRCP

Provides a quick and efficient way to submit responses to demands

Demands

- Submit defense documents
- Initiate electronic payments

View demand and case/beneficiary information

Available at: <https://www.cob.cms.hhs.gov/CRCP/>

Slide notes

The CRCP provides a quick and efficient way to submit responses to demands.

You may provide a response to a demand by submitting defense documents on the CRCP or make electronic payments.

Additionally, you may also view demand and case/beneficiary information on the CRCP. The CRCP may be accessed at the following link: [CMS CRCP Website](https://www.cob.cms.hhs.gov/CRCP/).

Getting Started

Employer/insurer entity creates CRCP account

- Completes PIN Request (Authorized Representative)
- Completes Account Setup (Account Manager)

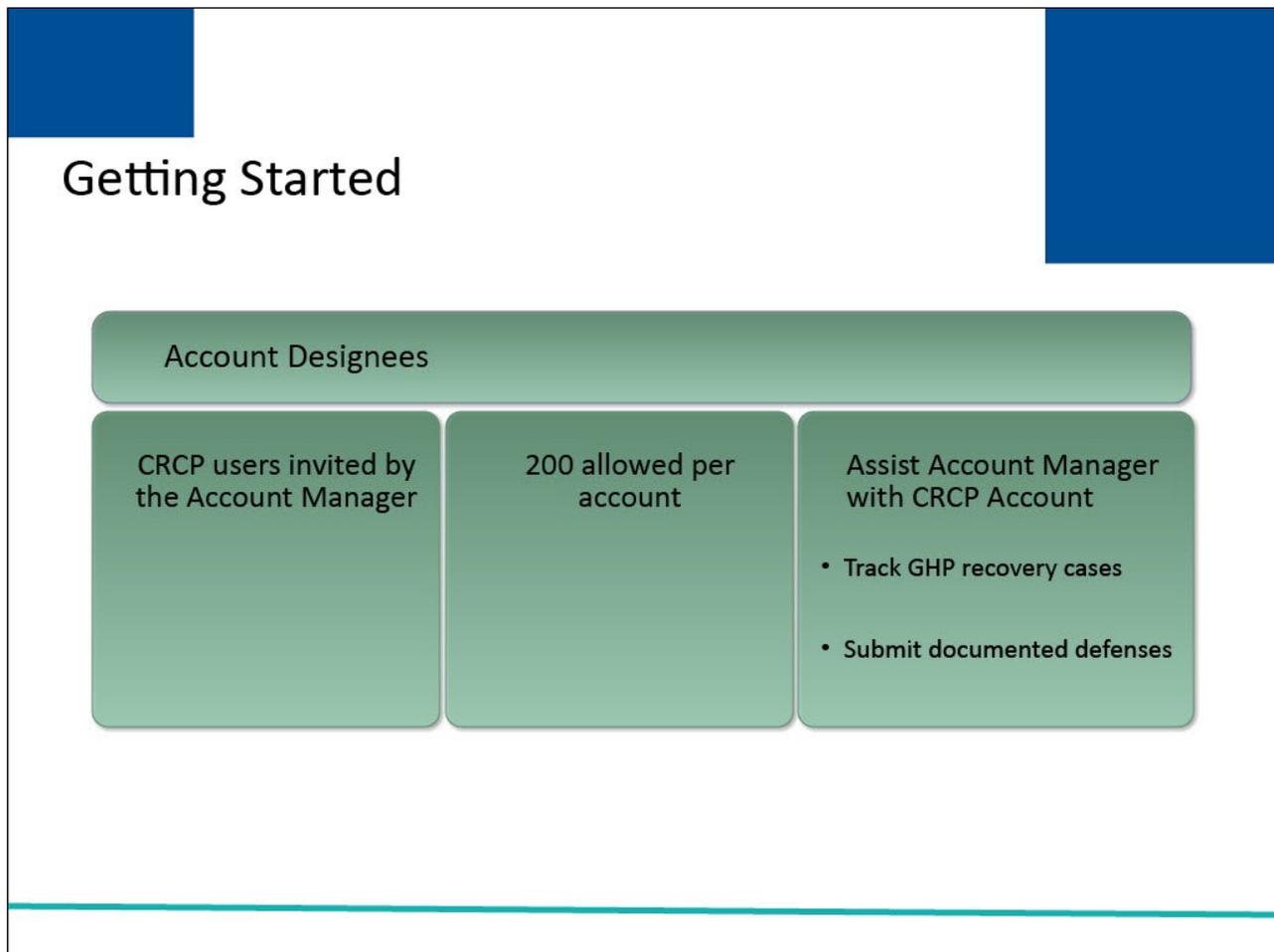
See “PIN Request” CBT and “Account Setup” CBT for more information

Slide notes

All users of the CRCP must register and be associated to a registered account. To establish a CRCP account, the employer or insurer entity must first complete the initial registration process for the CRCP account which involves the following 2 steps: Personal Identification Number or PIN Request and Account Setup. To complete the PIN Request, the employer/insurer entity must identify the Authorized Representative. The Authorized Representative is responsible for completing the PIN Request on the CRCP.

After the PIN Request is completed, the Authorized Representative must give the Account Manager the Account ID and PIN to complete the Account Setup. For more detailed information on these processes, please see the “PIN Request” CBT and “Account Setup” CBT.

Slide 6 of 35 - Getting Started



Slide notes

Once the PIN Request and Account Setup steps have been completed, the Account Manager may login and invite other CRCP users (Account Designees) to assist with the account. The CRCP permits up to 200 Account Designees per account.

Account Designees assist the Account Manager with tracking Group Health Plan or GHP recovery cases and submitting documented defenses. See the “Account Designee Maintenance” CBT for information on how the Account Manager adds Account Designees.

For information on the basic registration process an individual will follow to become an Account Designee, that is, how someone will set up their Login ID and Password), see the “Account Designee Access” CBT.

Slide 7 of 35 - Login Warning Page

Skip Navigation | [Print this page](#)

CMS Commercial Repayment Center Portal **COB&R**
CENTERS FOR MEDICARE & MEDICAID SERVICES Coordination of Benefits and Recovery

Login Warning

UNAUTHORIZED ACCESS TO THIS COMPUTER SYSTEM IS PROHIBITED BY LAW

This warning banner provides privacy and security notices consistent with applicable federal laws, directives, and other federal guidance for accessing this Government system, which includes: (1) this computer network, (2) all computers connected to this network, and (3) all servers and storage media attached to this network or to a computer on this network. This system is provided for Government-authorized use only. Unauthorized or improper use of this system is prohibited and may result in disciplinary action, and/or civil and criminal penalties.

Personal use of social media and networking sites on this system is limited as to not interfere with official work duties and is subject to monitoring.

By using this system, you understand and consent to the following:

- *You have no reasonable expectation of privacy regarding any communication or data transmitting or stored on this system.
- *The Government may monitor, record, and audit your system usage, including usage of personal devices and email systems for official duties or to conduct HHS business. Therefore, you have no reasonable expectation of privacy regarding any communication or data transmitting or stored on this system. At any time, and for any lawful Government purpose, the Government may monitor, intercept, and search and seize any communication or data transmitting or stored on this system.
- *Any communication or data transmitting or stored on this system may be disclosed or used for any lawful Government purpose.

<http://www.cms.hhs.gov/About-CMS/Agency-Information/Aboutwebsite/Security-1-protocols.html>

Privacy Act Statement

The collection of this information is authorized by Section 1862(b) of the Social Security Act (codified at 42 U.S.C. 1396y(b)) (see also 42, C.F.R. 411.24). The information collected will be used to identify and recover past conditional and mistaken Medicare primary payments and to prevent Medicare from making mistaken payments in the future for those Medicare Secondary Payer situations that continue to exist.

Attestation of Information

The information provided is complete, truthful, accurate, and meets all requirements set forth to use this process; and, I have read and understand all of the Centers for Medicare & Medicaid Services information at <https://www.cms.gov/Medicare/Coordination-of-Benefits-and-Recovery/Coordination-of-Benefits-and-Recovery-Overview/CRCP/Commercial-Repayment-Center-Portal.html>.

IMPORTANT NOTICE: If you do not agree to the conditions stated in this warning

Slide notes

Once you are registered as a CRCP user, you may login to the CRCP at the following link: [CMS CRCP Website](#). Each time a user visits the CRCP Web site, the Login Warning page will display.

This page provides information about CRCP security measures including access, penalty and privacy laws. All users must agree to the terms of this warning each time they access the CRCP. Click the I Accept link at the bottom of the page to continue.

Slide 8 of 35 - Welcome Page

The screenshot shows the Commercial Repayment Center Portal (CRCP) Welcome Page. At the top, there is a navigation bar with the CMS logo, the text "Commercial Repayment Center Portal", and the COB&R logo. Below the navigation bar is a menu with links: "About This Site", "CMS Links", "How To...", "Reference Materials", and "Contact Us". The main content area includes a "Welcome to the CRCP" section with a brief description of the portal's purpose. Below this is a "CRCP Messages" section with a red banner stating: "The CRCP will be unavailable nightly from approximately midnight - 4am Eastern Standard Time". The "Getting Started" section provides instructions on how to use the application, mentioning a two-step registration process. At the bottom, there are two buttons: "Step 1: PIN Request (Letter ID and TIN required)" and "Step 2: Account Setup (Account ID and PIN required)". On the right side, a "Sign in to your account:" form is highlighted with a red border. The form contains fields for "Login ID:" and "Password:", each with a "Forgot" link below it. At the bottom of the form are three buttons: "Login", "Clear", and "2-Factor Login".

Slide notes

The Welcome to the CRCP page displays. Enter your Login ID and Password. Please note: The Account Manager establishes his/her Login ID and Password during Account Setup.

The Account Designee establishes his/her Login ID and Password when they register on the CRCP, only after being invited by the Account Manager.

Slide 9 of 35 - Account Listing Page

Account Listing

The Account IDs associated to your Login ID are listed on this page. Select the Account ID you want to access by clicking the appropriate Account ID link. To view a list of all Tax Identification Numbers (TINs) associated to an Account ID, click the corresponding View TINs Listing link.

Multi-Factor Authentication

Status: **Initial Process**

Next Step: [Getting Started](#)

Multi-Factor Authentication

 CRCP users may request access to view unmasked Medicare beneficiary Protected Health Information (PHI)/Personally Identifiable Information (PII). 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 this 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 CRCP. 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 CRCP 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 to receive your security token via text message. After the Factor registration, you must then 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.

Account ID	Company Name	Associated TINs
12345	Testing Company	View TINs Listing

Slide notes

After a successful login, the Account Listing page displays. This page is the user’s home page. It lists the accounts associated to your Login ID. Account IDs will be added or removed from this page whenever your Login ID becomes associated or disassociated to an account.

Registered CRCP users will become associated to a new account when they are invited to the account by the Account Manager. New CRCP users will become associated to a new account after they are invited to the account and have completed the CRCP registration process.

You will be disassociated from an account if the Account Manager for the account removes your access. To view TINs associated to the Account ID, click the View TINs Listing link.

Slide 10 of 35 - TINs Associated to Account ID Page

The screenshot displays the CMS Commercial Repayment Center Portal. At the top, there are logos for CMS (Centers for Medicare & Medicaid Services) and COB&R (Coordination of Benefits and Recovery). The page title is "TINs Associated to Account ID". Below the title, a message states: "The Tax Identification Numbers (TINs) listed on this page are associated to Account ID: 111111111 - CIGNA." A table with the heading "Associated TINs" lists four TINs: 012365478902, 14785236900, 80236974101, and 35716084260. A "Previous" button is located below the table. At the bottom of the page, there are links for "Privacy Policy", "User Agreement", and "Adobe Acrobat".

Associated TINs
012365478902
14785236900
80236974101
35716084260

Slide notes

The TINS Associated to Account ID page displays. This page lists all of the Tax Identification Numbers or TINs associated to the Account ID. There will always be at least one TIN associated to an Account ID, since a TIN is required to complete the initial PIN Request.

Additional TINs may become associated to your account when a CRCP user completes the Request Letter Access process. See the "Request Letter Access" CBT for more information.

Slide 11 of 35 - Account Listing Page

CMS Commercial Repayment Center Portal **COB&R** Coordination of Benefits and Recovery

Home User Options About This Site CMS Links How To... Reference Materials Contact Us Log Off

Account Listing

The Account IDs associated to your Login ID are listed on this page. Select the Account ID you want to access by clicking the appropriate Account ID link. To view a list of all Tax Identification Numbers (TINs) associated to an Account ID, click the corresponding View TINs Listing link.

Multi-Factor Authentication
Status: **Initial Process**
Next Step: [Getting Started](#)

Multi-Factor Authentication

 CRCP users may request access to view unmasked Medicare beneficiary Protected Health Information (PHI)/Personally Identifiable Information (PII). 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 this 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 CRCP. 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 CRCP 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 to receive your security token via text message. After the Factor registration, you must then 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.

Account ID	Company Name	Associated TINs
12345	Testing Company	View TINs Listing

Slide notes

The Account Listing page functions as the main processing page to initiate any CRCP functions. From this page, select the Account ID link for the account you want to access.

Slide 12 of 35 - Account Detail Page

CMS Commercial Repayment Center Portal **COB&R**
CENTERS FOR MEDICARE & MEDICAID SERVICES Coordination of Benefits and Recovery

Home User Options Account Settings About This Site CMS Links How To Reference Materials Contact Us Log off

Account Detail [Quick Help](#)

You have selected Account ID: 11111111 - CIGNA

Information associated to this Account ID will be presented on applicable pages in the Commercial Repayment Center Portal. You may access these pages using the links provided on this page.

If you would like to access a different Account ID, click **Previous** or Home. When the Account Listing page displays, select the Account ID you would like to access.

Available Actions

To view demands/case information or to submit defense documentation, click this link. Demand Listing	To request access to information related to a letter that is not yet associated to this Account ID, click this link. Request Letter Access	To view all cases that have an Accounts Receivable amount greater than zero, click this link. Open Debt Report
---	---	---

To remove access related to a letter associated to this Account ID, the Account Manager for this Account must contact an EDI Representative at the Benefits Coordination Recovery Center (BCRC) and provide them with key information from the letter that should be removed. EDI Representatives can be reached at: (646) 458-6740.

[Previous](#)

Slide notes

After the Account ID is selected, the Account Detail page displays. This page functions as the main page where you can access CRCP functions available to you: Demand Listing, Request Letter Access and Open Debt Report.

Demand Listing is used to view demands/case information, submit defense documentation or make an electronic payment on the account.

Request Letter Access is used to obtain access to information related to a letter that is not yet associated to your CRCP account.

Open Debt Report are available to Account Managers only and shows the status of all open debts related to the account ID selected.

Slide 13 of 35 - Demand Listing Page

The screenshot shows a web application interface for 'Demand Listing'. At the top, there is a navigation menu with links: Home, User Options, Account Settings, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Log off. Below the menu, the page title is 'Demand Listing' with a 'Quick Help' icon. A descriptive paragraph states: 'Unresolved/open demands that were issued in the past three months are listed on this page. To search for any Demand Letter ID, including a demand that has been closed, enter your criteria and then click Search.' Below this, there are search filters: 'Demand Letter ID' with a text input field and a 'Demand Letter ID Search Hint' link; 'Demand Letter Sent Date From' with a date picker (MM/DD/YYYY); and 'Demand Letter Sent Date To' with a date picker (MM/DD/YYYY) and a 'From and To Date Search Hint' link. There are 'Search' and 'Clear' buttons. Below the filters, it says 'Demand Letters Issued to Companies Associated with Account ID: 111111' and 'Results Returned: 5'. A paragraph explains: 'You may view a list of Beneficiaries/Case ID's included in a Demand Letter as long as the Status is Open. To view this list, click the Demand Letter ID link for the applicable letter. If you need additional information regarding a demand that has been resolved/closed, please contact the Commercial Repayment Center at 1-855-798-2627.' Below this is a table with columns: Viewed, Demand Letter ID, Number of Cases, Letter Date, and Demand Status. The table contains five rows of data. At the bottom left, there is a 'Previous' button.

Viewed	Demand Letter ID	Number of Cases	Letter Date	Demand Status
Yes	86123455	1	04/13/2014	Open
Yes	86123454	1	04/11/2014	Open
Yes	86123453	1	04/10/2014	Open
No	86123452	1	04/09/2014	Open
	86123451	1	04/08/2014	Closed

Slide notes

When the Demand Listing link is selected, the Demand Listing page displays. By default, this page lists all unresolved/open demands that the Commercial Repayment Center (CRC) has issued in the past 3 months for this account. Use the search function to locate any demand, including a demand that has been closed.

To view case specific information, click the Demand Letter ID link. The Demand Letter ID was an 8 or 9-digit number that may now include up to 15 digits. Note: This link will only be enabled if the Demand Status is 'Open'. A Viewed column has been added to the Demand Listing page, as it helps to identify when new Demands have been added to the account.

Slide 14 of 35 - Demand Detail Page

Home User Options Account Settings About This Site CMS Links How To... Reference Materials Contact Us Log off

Demand Detail Quick Help

You have selected Demand Letter ID: 861236547.

The Total Demand Amount originally included on this letter was:		\$51,100.45	
Employer Name:	BLUE CROSS	Insurer Name:	CIGNA
Employer TIN:	#####	Insurer TIN:	#####

To search for a specific Case ID/beneficiary included in this Demand Letter, enter your criteria and then click Search. Once located, you can click the Case ID link to view detailed information related to that beneficiary.

Case ID: [Case ID Search Hint](#)

Medicare ID: [Medicare ID Search Hint](#)

Beneficiary Last Name: [Beneficiary Last Name Search Hint](#)

Submit a Defense

If you have a valid defense that precludes your responsibility for repaying Medicare for any beneficiary included in this demand, you may upload documentation that supports your defense. Click the Defense checkbox for each Case ID/beneficiary to be included in your defense. Once all Case IDs/beneficiaries have been selected, click Continue. To see a list of all defenses that have been previously submitted on the CRCP for this Demand Letter, click the Submitted Defenses button.

Beneficiaries Included in the Demand Letter Results Returned: 5

Defense Select All/ Deselect All Open Cases	Case ID	Medicare ID	Beneficiary First Name	Beneficiary Last Name	Case Amount	Case Status	Date Closed	Case Viewed
<input type="checkbox"/>	C1234560001	*****1234A	First	Last	4,400.00	Open		No

Slide notes

After the Demand Letter ID is selected, the Demand Detail page displays the original demand amount, employer and insurer information and a list of the beneficiaries included in the demand letter.

For each beneficiary or Case ID, a masked Medicare ID is shown along with the Beneficiary Name, original Case Amount and Case Status. You can view detailed case information, by clicking the Case ID. For more information, see the "Case Information" CBT.

Slide 15 of 35 - Demand Detail Page

Submit a Defense

If you have a valid defense that precludes your responsibility for repaying Medicare for any beneficiary included in this demand, you may upload documentation that supports your defense. Click the Defense checkbox for each Case ID/beneficiary to be included in your defense. Once all Case IDs/beneficiaries have been selected, click Continue. To see a list of all defenses that have been previously submitted on the CRCP for this Demand Letter, click the Submitted Defenses button.

Beneficiaries Included in the Demand Letter Results Returned: 5

Defense Select All / Deselect All Open Cases	Case ID	Medicare ID	Beneficiary First Name	Beneficiary Last Name	Case Amount	Case Status	Date Closed	Case Viewed
<input type="checkbox"/>	C1234560001	****1234A	Mike	Lansing	\$4,400.00	Open		No
<input type="checkbox"/>	C1234560002	****2345A	John	Bosely	\$15,400.00	Open		No
<input type="checkbox"/>	C1234560003	****4456A	Elizabeth	Florence	\$16,900.00	Open		Yes
<input type="checkbox"/>	C1234560004	****2244A	Frances	Christobell	\$400.00	Open		Yes
<input type="checkbox"/>	C1234560005	****3365A	Blaxton	Jasper	\$14,000.00	Closed	05/10/2018	Yes

Previous
Make a Payment
Submitted Defenses
Continue

Slide notes

If you have a valid defense for a beneficiary, you may upload documentation that supports your defense. To begin this process, select the Defense checkbox for each beneficiary to be included in your defense.

Once all beneficiaries have been selected, click Continue. Note: The Defense checkbox is disabled if the Case Status is Closed. See the "Demands" CBT for more information on this process.

Slide 16 of 35 - Request Letter Access Page

Request Letter Access Quick Help

You may submit a request to associate data related to a Demand or Defense letter you received from the Commercial Repayment Center (CRC) that is not currently available on the portal for this Account ID. To associate this data, enter the information requested on this page and click **Continue**.

Once validated, information from the requested letter, as well as information from all related letters, will be available on the Demand Listing and other applicable pages for this Account ID. Click **Cancel** to return to the Account Detail page without submitting your request.

All fields are required.

Letter Information

Enter and re-enter the Letter ID and the Tax Identification Number (TIN) from the letter you want to access: Entry Hint

*Letter ID:

*Re-enter Letter ID:

*Tax Identification Number

* Select the type of letter you are using to associate information to your account and provide the required key piece of data for that letter type: Entry Hint

Defense Letter - Enter the Case ID:

Demand Letter - Enter the Total Debt Due printed on the letter: \$.

Slide notes

After clicking the Request Letter Access link from the Account Detail page, the Request Letter Access page displays. The CRCP associate’s information related to letters you have received from the CRC to your Account ID as part of the initial PIN Request and Account Setup process.

If you cannot find information for a Demand or Defense letter on your CRCP account, you can request access to this data via the Request Letter Access process.

Once the CRCP validates your request, information from the requested letter, as well as information from all related letters, will be available on the CRCP.

Note: The Request Letter Access function has been updated to include the Tax Identification Number or TIN as an additional matching criterion. See the “Request Letter Access” CBT for more information.

Slide 17 of 35 - Account Listing Page

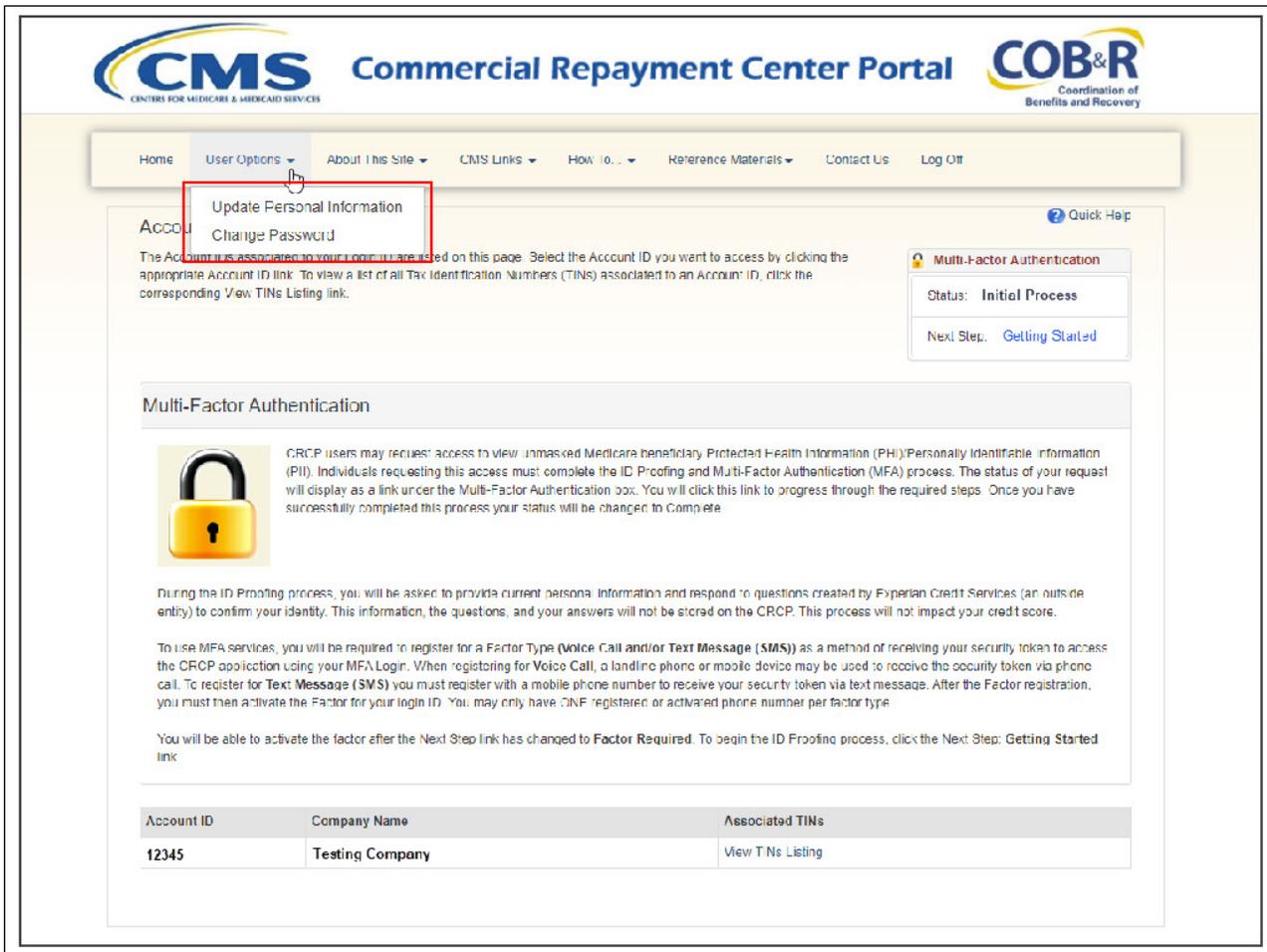
The screenshot shows the 'Account Listing' page of the Commercial Repayment Center Portal. At the top, there is a navigation bar with the following items: 'Skip Navigation', 'Login ID : [redacted]', and 'Print this page'. Below this is the CMS logo (Centers for Medicare & Medicaid Services) and the COB&R logo (Coordination of Benefits and Recovery). A secondary navigation menu is highlighted with a red box, containing: 'Home', 'User Options', 'About This Site', 'CMS Links', 'How To...', 'Reference Materials', 'Contact Us', and 'Log Off'. The main content area is titled 'Account Listing' and includes a 'Quick Help' icon. Below the title is a paragraph: 'The Account IDs associated to your Login ID are listed on this page. Select the Account ID you want to access by clicking the appropriate Account ID link. To view a list of all Tax Identification Numbers (TINs) associated to an Account ID, click the corresponding View TINs Listing link.' A table follows with three columns: 'Account ID', 'Company Name', and 'Associated TINs'. The table contains one row with a blue link for the Account ID, a company name, and a 'View TINs Listing' link. At the bottom of the page, there is a footer with 'Privacy Policy | User Agreement'.

Slide notes

The navigation menu at the top of Home page (and each page in the portal) provides access the following menu options: Home, User Options, About This Site; CMS Links; How To; Reference Materials; and Contact Us.

Home navigates to the Account Listing page where you can access the Account IDs associated to your Login ID.

Slide 18 of 35 - Account Listing Page



Slide notes

The User Options section contains the following links: Update Personal Information - Used to update your contact information, such as e-mail address and phone number; Change Password - Used to change your Password, whether it has expired, has been compromised, or you have been issued a temporary Password. See the “User and Account Information” CBT for more information on these functions.

Slide 19 of 35 - Account Listing Page

CMS Commercial Repayment Center Portal **COB&R**
Centers for Medicare & Medicaid Services Coordination of Benefits and Recovery

Home User Options **About This Site** CMS Links How To... Reference Materials Contact Us Log Off

How To Use This Site Quick Help

Account Listing

The Account IDs associated to your Login ID are listed on this page. Select the Account ID you want to access by clicking the appropriate Account ID link. To view a list of all Tax Identification Numbers (TINs) associated to an Account ID, click the corresponding View TINs Listing link.

Multi-Factor Authentication
Status: Initial Process
Next Step: Getting Started

Multi-Factor Authentication

CRCP users may request access to view unmasked Medicare beneficiary Protected Health Information (PHI)/Personally Identifiable Information (PII). 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 this 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 CRCP. 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 CRCP 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 to receive your security token via a text message. After the Factor registration, you must then 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.

Account ID	Company Name	Associated TINs
12345	Testing Company	View TINs Listing

Slide notes

About This Site navigates to the How to Use This Site link, offering general information on how to use the CRCP.

Slide 20 of 35 - Account Listing Page

The screenshot displays the 'Commercial Repayment Center Portal' with the CMS logo and COB&R logo. The navigation bar includes 'Home', 'User Options', 'About This Site', 'CMS Links', 'How To...', 'Reference Materials', 'Contact Us', and 'Log Off'. The 'CMS Links' dropdown menu is open, showing 'Coordination of Benefits & Recovery Overview' and 'Group Health Plan Recovery'. The main content area is titled 'Account Listing' and includes a 'Multi-Factor Authentication' section with a padlock icon and a table of account information.

Multi-Factor Authentication

CRCP Users may request access to view unmasked Medicare beneficiary Protected Health Information (PHI)/Personally Identifiable Information (PII). 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 this 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 CRCP. 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 CRCP 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 to receive your security token via text message. After the Factor registration, you must then 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.

Account ID	Company Name	Associated TINs
12345	Testing Company	View TINs Listing

Slide notes

CMS Links provides links to the 'Coordination of Benefits & Recovery Overview' and the 'Group Health Plan Recovery' sections of the CMS.gov web site.

Slide 21 of 35 - Account Listing Page

CMS Commercial Repayment Center Portal **COB&R**
CENTERS FOR MEDICARE & MEDICAID SERVICES Coordination of Benefits and Recovery

Home User Options About This Site CMS Links **How To** Reference Materials Contact Us Log Off

Account Listing
The Account IDs associated to your Login ID are listed on this page. See appropriate Account ID link to view a list of all Tax Identification Numbers corresponding View TINs Listing link.

Multi-Factor Authentication
CRCP users may request access to view unmasked Medicare beneficiary Protected Health Information (PHI)/Personally Identifiable Information (PII). 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 this 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 CRCP. 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 CRCP 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 to receive your security token via text message. After the Factor registration, you must then 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.

Account ID	Company Name	Associated TINs
12345	Testing Company	View TINs Listing

Slide notes

The How To section provides detailed information on performing the following functions: 'Getting Started'; 'Requesting your Login ID'; 'Requesting your Password'; 'Changing your Password'; 'Resetting your PIN'; 'Changing your Authorized Representative'; 'Changing Your Account Manager; and 'Inviting and Removing Account Designees'.

Slide 22 of 35 - Account Listing Page

CMS Commercial Repayment Center Portal **COB&R**
CENTERS FOR MEDICARE & MEDICAID SERVICES Coordination of Benefits and Recovery

Home Use Options ▾ About This Site ▾ CMS Links ▾ How To ▾ Reference Materials ▾ Contact Us Log Off

CRCP User Manual Quick Help

Account Listing

The Account IDs associated to your Login ID are listed on this page. Select the Account ID you want to access by clicking the appropriate Account ID link. To view a list of all Tax Identification Numbers (TINs) associated to an Account ID, click the corresponding View TINs Listing link.

Multi-Factor Authentication

Status: **Initial Process**

Next Step: [Getting Started](#)

Multi-Factor Authentication

 CRCP Users may request access to view unmasked Medicare beneficiary Protected Health Information (PHI)/Personally Identifiable Information (PII). 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 this process your status will be changed to Complete.

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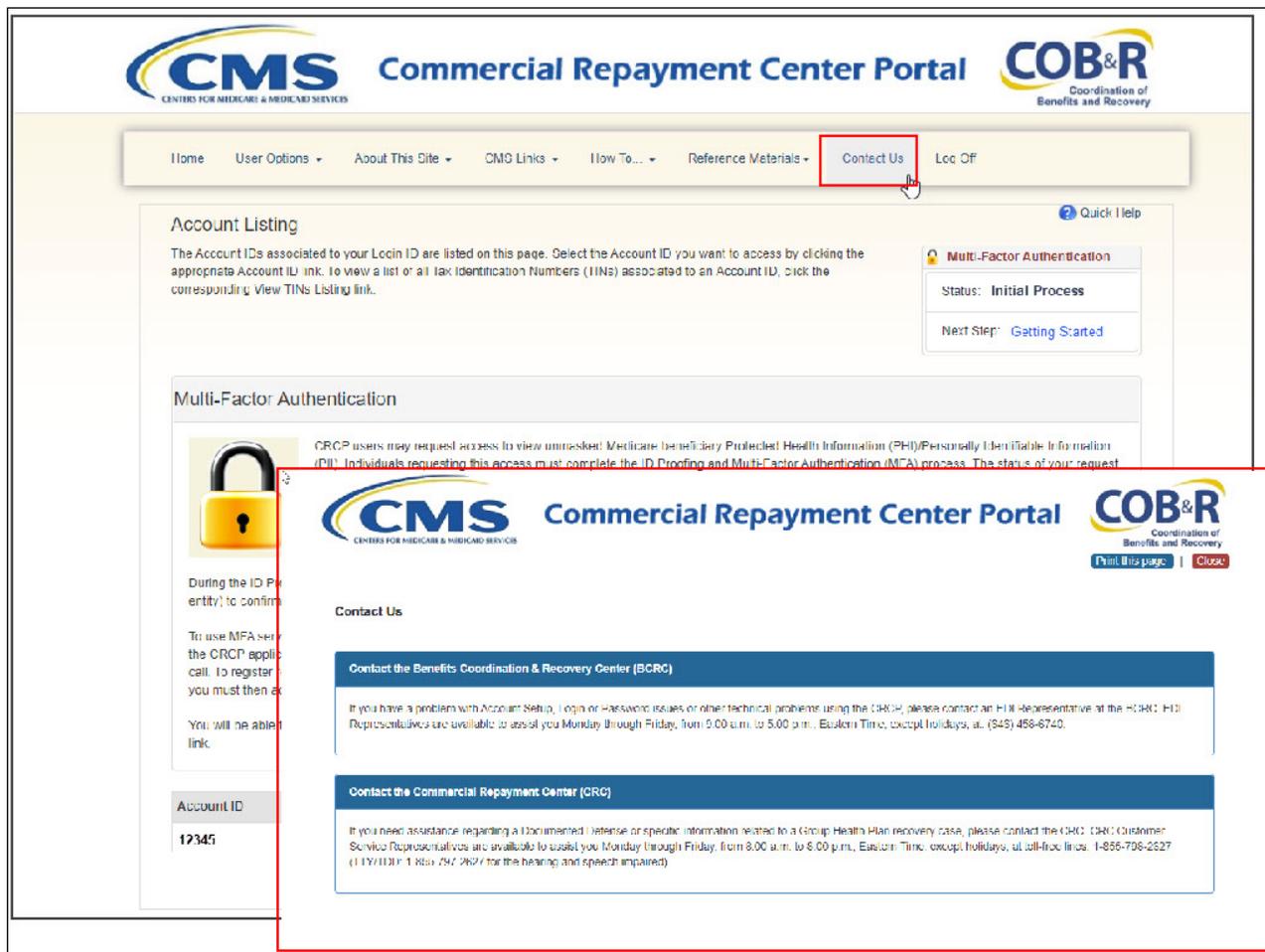
You will be able to activate the factor after the Next Step link has changed to Factor Required. To begin the ID Proofing process, click the Next Step: [Getting Started](#) link.

Account ID	Company Name	Associated TINs
12345	Testing Company	View TINs Listing

Slide notes

Reference Materials provides a link to the CRCP User Guide. The CRCP User Guide was written to help you understand how to use the CRCP. It includes detailed instructions on how to manage demands, defenses and PPNs on the CRCP.

Slide 23 of 35 - Account Listing Page



Slide notes

Contact Us displays information on where to go for assistance with Account Setup, Login and Password issues, technical problems, or case specific inquiries.

Slide 24 of 35 - Account Detail Page

The screenshot displays the 'Account Detail' page of the Commercial Repayment Center Portal. The 'Account Settings' dropdown menu is expanded, highlighting four options: 'Update Authorized Representative (AR) Information', 'Designee Maintenance', 'View Associated TINs', and 'View Account Activity'. The page header includes the CMS logo and the COB&R logo. The navigation bar contains links for Home, User Options, Account Settings, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Log off. The main content area features a 'Quick Help' icon and a 'Previous' button. Below the 'Account Detail' section, there are three 'Available Actions' boxes: 'Demand Listing', 'Request Letter Access', and 'Open Debt Report'. A 'Previous' button is located at the bottom left of the page.

Slide notes

From the Account Detail page, you can access the account settings. The Account Settings drop-down menu contains the following links:

- View or Update Authorized Representative (AR) Information - Used to view or change the Authorized Representative (AR) information. Note: The Account Designee does not have access to link.
- Designee Maintenance - Used to add and delete Account Designees. Note: The Account Designee does not have access to this link.
- View Associated TINs - Used to view the TINs that are associated to your account.
- View Account Activity - Used to view a history of when the following activities were completed for the selected CRCP account: PIN Request, Account Setup and Request Letter Access.

Slide 25 of 35 - Account Listing Page

Skip Navigation | Login ID: [Redacted] | [Print this page](#)

CMS Commercial Repayment Center Portal **COB&R**
CENTERS FOR MEDICARE & MEDICAID SERVICES Coordination of Benefits and Recovery

Home User Options About This Site CMS Links How To... Reference Materials Contact Us Log Off

Account Listing [Quick Help](#)

The Account IDs associated to your Login ID are listed on this page. Select the Account ID you want to access by clicking the appropriate Account ID link. To view a list of all Tax Identification Numbers (TINs) associated to an Account ID, click the corresponding View TINs Listing link.

Multi-Factor Authentication

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

 **Multi-Factor Authentication**

CRCP users may request access to view unmasked Medicare beneficiary Protected Health Information (PHI)/Personally Identifiable Information (PII). 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 this process your status will be changed to Complete.

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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.

Account ID	Company Name	Associated TINs
111111111	CIGNA	View TINs Listing
222222222	United Health Care	View TINs Listing

Slide notes

To obtain access to online help documentation, you can select the Quick Help link which is available on every page in the portal. To print a copy of any CRCP page, use the Print this page link.

Slide 26 of 35 - Account Listing Page

CMS Commercial Repayment Center Portal **COB&R**
CENTERS FOR MEDICARE & MEDICAID SERVICES Coordination of Benefits and Recovery

Home User Options About This Site CMS Links How To... Reference Materials Contact Us **Log Off**

Account Listing [Quick Help](#)

The Account IDs associated to your Login ID are listed on this page. Select the Account ID you want to access by clicking the appropriate Account ID link. To view a list of all Tax Identification Numbers (TINs) associated to an Account ID, click the corresponding View TINs Listing link.

Multi-Factor Authentication

Status: **Initial Process**

Next Step: [Getting Started](#)

Multi-Factor Authentication

 CRCP users may request access to view unmasked Medicare beneficiary Protected Health Information (PHI)/Personally Identifiable Information (PII). 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 this 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 CRCP. This process will not impact your credit score.

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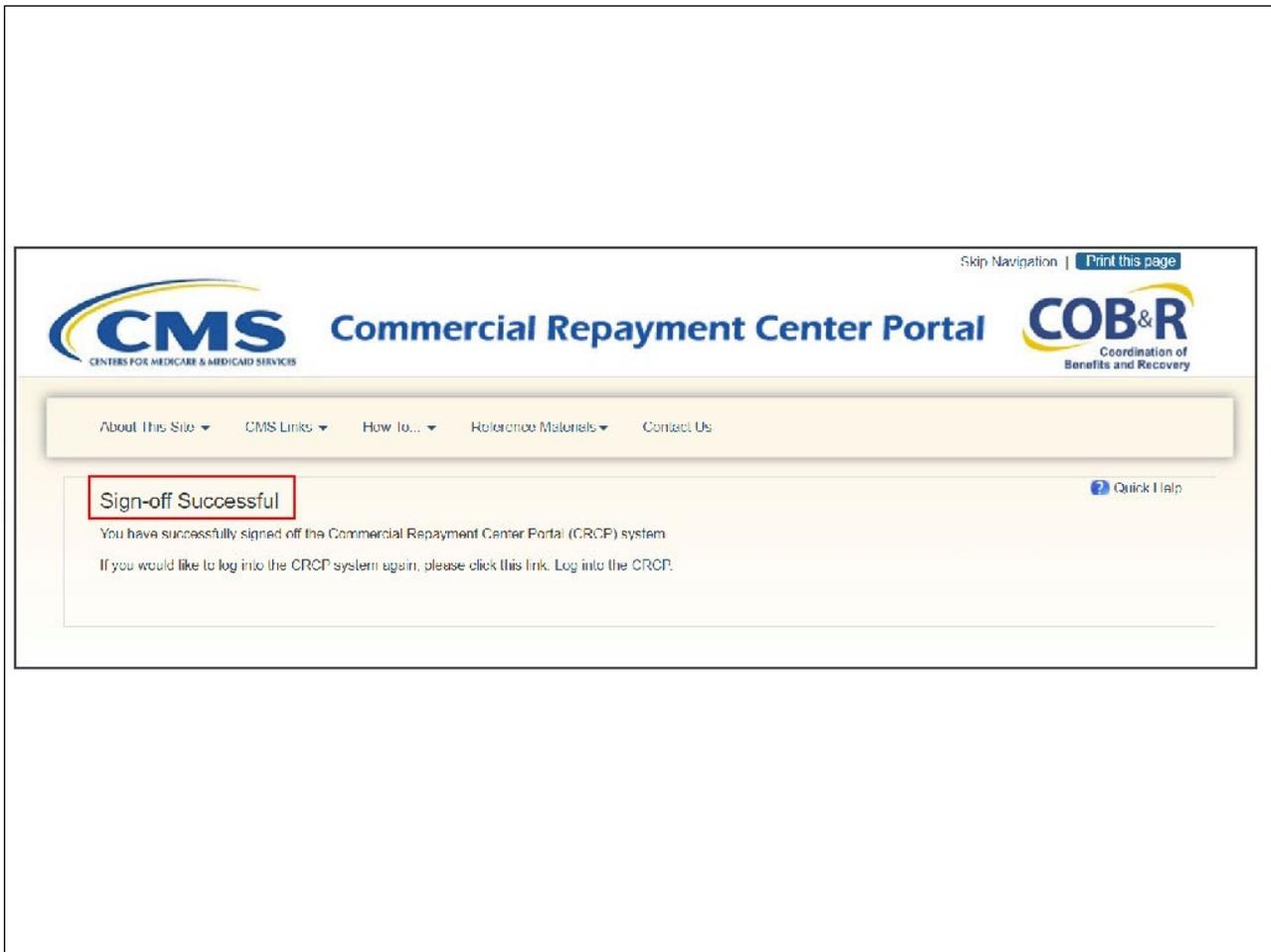
You will be able to activate the factor after the Next Step link has changed to Factor Required. To begin the ID Proofing process, click the Next Step [Getting Started](#) link.

Account ID	Company Name	Associated TINs
12345	Testing Company	View TINs Listing

Slide notes

To end your session, click Log off.

Slide 27 of 35 - Sign-off Successful Page



Slide notes

The Sign-off Successful page displays.

Slide 28 of 35 – Open Debt Report



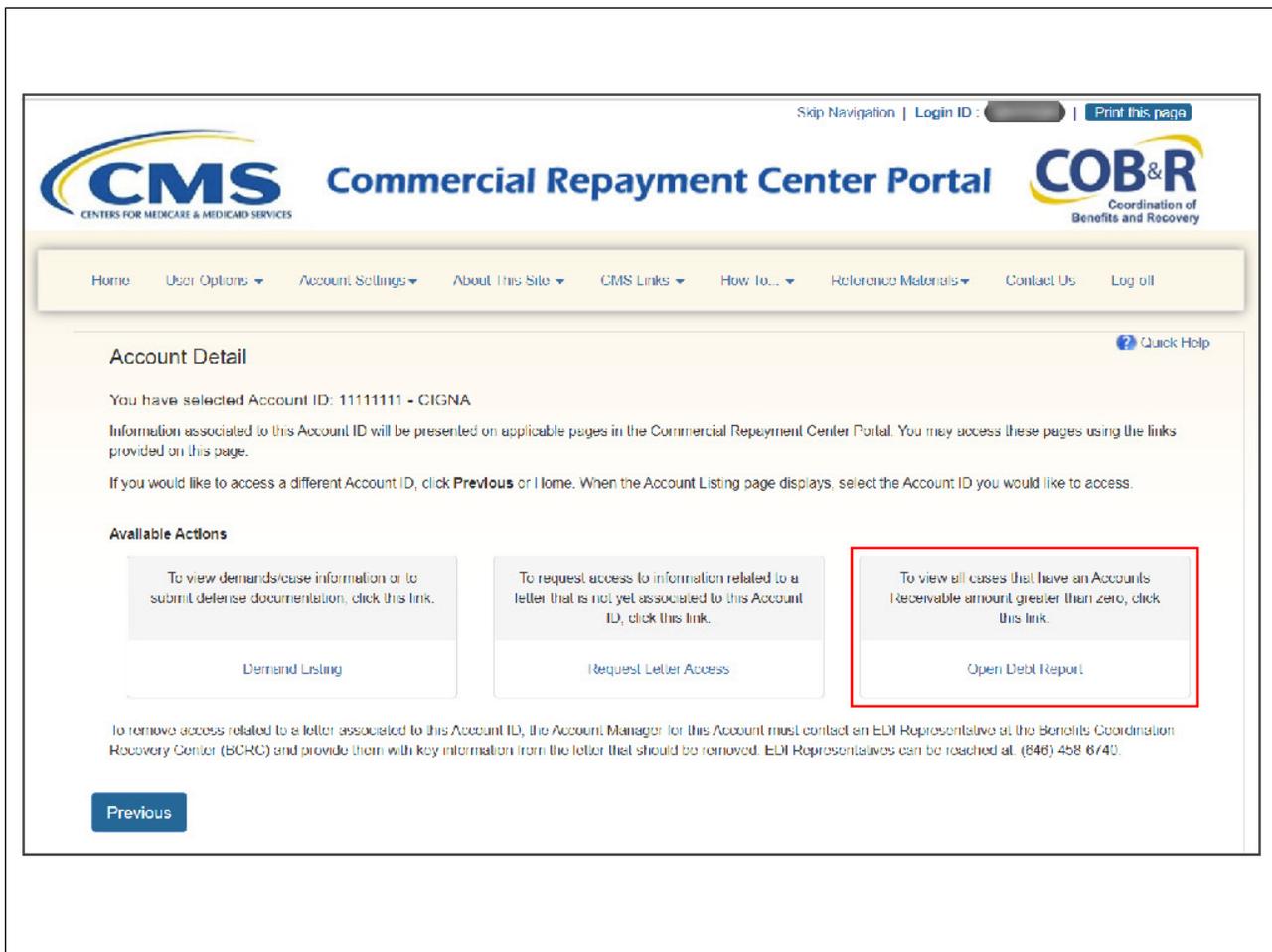
The slide features a dark blue background. In the top left corner, there is a white box containing the CMS logo (Centers for Medicare & Medicaid Services). In the top right corner, there is a white box containing the COB&R logo (Coordination of Benefits and Recovery). The main text on the slide is centered and reads "Open Debt Report" in a large white font, followed by "** Only Account Managers **" in a slightly smaller white font. A thin light blue horizontal line is visible at the bottom of the slide area.

Slide notes

Opening a Debt Report.

Note: Only Account Managers can open a debt report.

Slide 29 of 35 – Open Debt Report Link



Slide notes

Upon Login select the case where the debt report needs to be viewed. From the Account Detail page select Open Debt Report.

Slide 30 of 35 – Open Debt Report Search

The screenshot displays the CMS Commercial Repayment Center Portal. At the top right, there are links for "Skip Navigation", "Login ID : [redacted]", and "Print this page". The main header features the CMS logo (Centers for Medicare & Medicaid Services) and the COB&R logo (Coordination of Benefits and Recovery). Below the header is a navigation menu with items: Home, User Options, Account Settings, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Log off. The main content area is titled "Open Debt Report" and includes a "Quick Help" link. A text instruction reads: "Click **Search** to return up to 1000 Cases, oldest to newest, or enter a Demand Date range to limit the cases returned." Below this, there are two date input fields: "From Demand Date:" and "To Demand Date:", each with a "Clear" button. At the bottom of the search area are "Search" and "Previous" buttons.

Slide notes

Place the date range you are searching for and select search.

Slide 31 of 35 – Open Debt Cases

The screenshot shows the CMS Commercial Repayment Center Portal. At the top, there are logos for CMS (Centers for Medicare & Medicaid Services) and COB&R (Coordination of Benefits and Recovery). A navigation bar contains links for Home, User Options, Account Settings, About This Site, CMS Links, How To, Reference Materials, Contact Us, and Log off. The main content area is titled "Open Debt Report" and includes a search instruction: "Click Search to return up to 1000 Cases, oldest to newest, or enter a Demand Date range to limit the cases returned." Below this is a search form with "From Demand Date:" and "To Demand Date:" fields, each with a date picker and a "Clear" button. There are "Search" and "Previous" buttons. A note states: "The following are the cases with open debts as of 10/10/2020 associated to Account ID: 12345. The HIGLAS balance amounts may not reflect recent payments." Below the note is the "Open Debt Cases" section, which includes an "Export to Excel" button and a table of cases.

Case ID	Employer Name	Employer TIN	Insurer Name	Insurer TIN	Bene First Name	Bene Last Name	Policy Number	Demand Letter ID	Demand Letter Date	Original Demand Amount	Current HIGLAS Balance	Current Status of Debt
201117409000150	EFG Company	111222333	Humana	111222333	John	Doe	AG1234	20134323231212100	08/07/2019	\$125.00	\$100.00	DEBT REFERRAL
201117409000150	EFG Company	111222333	Humana	111222333	John	Doe	AG1234	20134323231212100	08/07/2019	\$125.00	\$100.00	DEBT REFERRAL
201117409000150	EFG Company	111222333	Humana	111222333	John	Doe	AG1234	20134323231212100	08/07/2019	\$125.00	\$100.00	DEBT REFERRAL
201117409000150	EFG Company	111222333	Humana	111222333	John	Doe	AG1234	20134323231212100	08/07/2019	\$125.00	\$100.00	DEBT REFERRAL
201117409000150	EFG Company	111222333	Humana	111222333	John	Doe	AG1234	20134323231212100	08/07/2019	\$125.00	\$100.00	DEBT REFERRAL

Slide notes

The Open Debt Cases will appear. You can export this report to excel by selecting the Export to Excel button.

Slide 32 of 35- Excel Open Debt Report

Case ID	Employer Name	Employer TIN	Insurer Name	Insurer TIN	Bene First Name	Bene Last Name	Policy Number	Demand Letter ID	Demand Letter Date	Original Demand Amount	Current HIGLAS Ba
20111709000150	LI G Company	111222333	Humana	111222333	John	Doe	AG1234	201312323121210	8/11/2019	125.00	
201117409000150	HKS Company	111222334	Humana	111222334	John	Doe	AG1235	2013437331121210	8/16/2019	125.00	
20111709000150	FFG Company	111222335	Humana	111222335	John	Doe	AG1236	2013137331121210	8/16/2019	125.00	
20111709000150	LI G Company	111222336	Humana	111222336	John	Doe	AG1237	201312323121210	8/16/2019	125.00	
201117409000150	HKS Company	111222337	Humana	111222337	John	Doe	AG1238	2013437331121210	8/11/2019	125.00	
20111709000150	FFG Company	111222338	Humana	111222338	John	Doe	AG1239	2013137331121210	8/12/2019	125.00	
20111709000150	LI G Company	111222339	Humana	111222339	John	Doe	AG1240	201312323121210	8/13/2019	125.00	
201117409000150	HKS Company	111222340	Humana	111222340	John	Doe	AG1241	2013437331121210	8/14/2019	125.00	
201117409000150	FFG Company	111222341	Humana	111222341	John	Doe	AG1242	2013437331121210	8/15/2019	125.00	
20111709000150	LI G Company	111222342	Humana	111222342	John	Doe	AG1243	201312323121210	8/16/2019	125.00	
201117409000150	HKS Company	111222343	Humana	111222343	John	Doe	AG1244	2013437331121210	8/17/2019	125.00	
201117409000150	FFG Company	111222344	Humana	111222344	John	Doe	AG1245	2013437331121210	8/18/2019	125.00	
20111709000150	FFG Company	111222345	Humana	111222345	John	Doe	AG1246	201312323121210	8/19/2019	125.00	
201117409000150	HKS Company	111222346	Humana	111222346	John	Doe	AG1247	2013437331121210	8/20/2019	125.00	
201117409000150	FFG Company	111222347	Humana	111222347	John	Doe	AG1248	2013437331121210	8/21/2019	125.00	
20111709000150	FFG Company	111222348	Humana	111222348	John	Doe	AG1249	201312323121210	8/22/2019	125.00	
201117409000150	HKS Company	111222349	Humana	111222349	John	Doe	AG1250	2013437331121210	8/23/2019	125.00	
201117409000150	FFG Company	111222350	Humana	111222350	John	Doe	AG1251	2013437331121210	8/24/2019	125.00	

Slide notes

This report will open in excel.

Slide 33 of 35 – Open Debt Report

The screenshot shows the 'Open Debt Report' page in the CMS Commercial Repayment Center Portal. At the top, there are logos for CMS (Centers for Medicare & Medicaid Services) and COB&R (Coordination of Benefits and Recovery). A navigation bar contains links for Home, User Options, Account Settings, About This Site, CMS Links, How To, Reference Materials, Contact Us, and Log off. The main heading is 'Open Debt Report' with a 'Quick Help' icon. Below the heading, there is a search instruction: 'Click Search to return up to 1000 Cases, oldest to newest, or enter a Demand Date range to limit the cases returned.' There are input fields for 'From Demand Date' and 'To Demand Date', each with a 'Clear' button. Below these are 'Search' and 'Previous' buttons. A note states: 'The following are the cases with open debts as of 10/10/2020 associated to Account ID: 12345. The HIGLAS balance amounts may not reflect recent payments.' The 'Open Debt Cases' section features an 'Export to Excel' button and a table with the following data:

Case ID	Employer Name	Employer TIN	Insurer Name	Insurer TIN	Bene First Name	Bene Last Name	Policy Number	Demand Letter ID	Demand Letter Date	Original Demand Amount	Current HIGLAS Balance	Current Status of Debt
201117409000150	EFG Company	111222333	Humana	111222333	John	Doe	AG1234	20134323231212100	08/07/2019	\$125.00	\$100.00	DEBT REFERRAL
201117409000150	EFG Company	111222333	Humana	111222333	John	Doe	AG1234	20134323231212100	08/07/2019	\$125.00	\$100.00	DEBT REFERRAL
201117409000150	EFG Company	111222333	Humana	111222333	John	Doe	AG1234	20134323231212100	08/07/2019	\$125.00	\$100.00	DEBT REFERRAL
201117409000150	EFG Company	111222333	Humana	111222333	John	Doe	AG1234	20134323231212100	08/07/2019	\$125.00	\$100.00	DEBT REFERRAL
201117409000150	EFG Company	111222333	Humana	111222333	John	Doe	AG1234	20134323231212100	08/07/2019	\$125.00	\$100.00	DEBT REFERRAL

Slide notes

You can select other reports or select the previous button to return to the Account Detail Page or Logoff once you have completed this action.

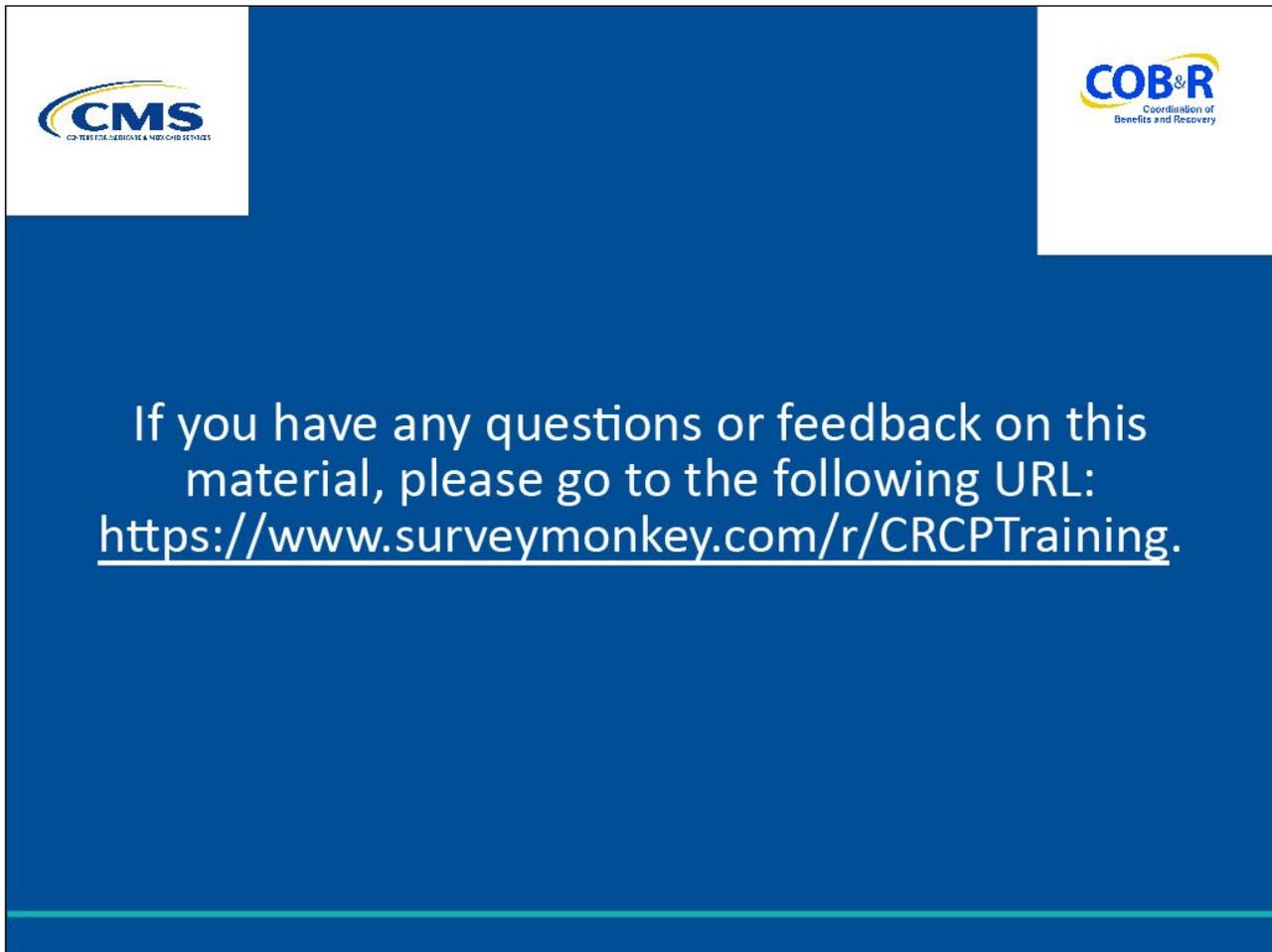
Slide 34 of 35 - Conclusion



You have completed the CRCP Application Overview course. Information in this course can be referenced by using the CRCP User Guide found under the *Reference Materials* menu at the following link: <https://www.cob.cms.hhs.gov/CRCP/>.

Slide notes

You have completed the CRCP PIN Request course. Information in this course can be referenced by using the CRCP User Guide found under the Reference Materials menu at the following link: [CMS CRCP Website](#).



The slide features a dark blue background. In the top left corner, there is a white box containing the CMS logo (Centers for Medicare & Medicaid Services). In the top right corner, there is a white box containing the COB&R logo (Coordination of Benefits and Recovery). The main text of the slide is centered and reads: "If you have any questions or feedback on this material, please go to the following URL: <https://www.surveymonkey.com/r/CRCPTTraining>."

Slide notes

If you have any questions or feedback on this material, please go to the following URL: [CRCP Training Survey](https://www.surveymonkey.com/r/CRCPTTraining).