Welcome to the Commercial Repayment Center Portal (CRCP) Application Overview course.
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/](https://www.cob.cms.hhs.gov/CRCP/).

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Course Overview

- CRCP Overview
  - View Demand and Case/Beneficiary Information
  - Conduct Case Searches
  - Respond to Demands
  - Initiating an Electronic Payment
  - View Open Debt Report
  - Request Go Paperless option/update preferences
  - Viewing/Printing E-mail or Letter Notifications

Slide notes

This course provides a brief overview of how the CRCP can be used to view case demands and case/beneficiary information, conduct case searches, respond to demands, initiate an electronic payment, view open debt reports, request the go paperless option, and how to view/print Letter Notifications.

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

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

New Registration (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 New Registration (PIN Request) on the CRCP.

After the New Registration (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 New Registration (PIN Request) and “Account Setup” CBT.

Note: The Account Representative will receive the PIN via email upon completion of the New Registration (PIN Request) process. The Account ID will be provided on the “CRCP PIN Request Completed Successfully. Thank you.” page and needs to be recorded by the registrar at that time. This information is required for the Account Manager to complete the Account Setup step.
Once the New Registration (PIN Request) and Account Setup steps have been completed, the Account Manager may log in 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.
Once you are registered as a CRCP user, you may log in to the CRCP at the following link: [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.
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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.
After a successful login, the Account Listing page displays. This page is the user’s home page. It lists the accounts associated with your Login ID. Account IDs will be added or removed from this page whenever your Login ID becomes associated or disassociated with an account.

Registered CRCP users will become associated with a new account when they are invited to the account by the Account Manager. New CRCP users will become associated with 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 with the Account ID, click the View TINs Listing link.

Note: The green leaf next to an Account ID indicates the account is set up for the Go Paperless option. This will be discussed later in this course.
The TINS Associated to Account ID page displays. This page lists all of the Tax Identification Numbers or TINs associated with the Account ID or the Company Name. There will always be at least one TIN associated with an Account ID since a TIN is required to complete the initial PIN Request.

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

Once you have viewed the TINs, select the “Previous” button to return to the Account Listing page.
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.
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 such as Demand Listing Case Search, and Request Letter Access. Account Managers will also have access to Open Debt Report, Go Paperless, and Letter Notifications hyperlinks.

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

Case Search allows users to access specific cases (using the Account ID or Case ID).

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

Open Debt Report shows the status of all open debts related to the account ID selected.

Go Paperless is used to request/update paperless preferences for the selected account and Letter Notifications is used to view/print the Go Paperless letter notification emails and letters. Again, these are only available to the Account Manager.
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 link is the 8 or 9-digit number that may now include up to 15 digits). 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.

Note: The Account Detail button will return you back to the Account Detail page.
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. The Claim Count, Treasury Referral Date, Treasury Account Number, and Current Status of Debt fields have also been added to provide additional treasury information on the CRCP.

You can view detailed case information, by clicking the Case ID. For more information, see the “Case Information” CBT.

You can return to the Demand Listing page by clicking the Demand Listing button or Make a Payment by using the Make a Payment button. For more information on Making a Payment, see the Electronic Payments CBT.

Users also now have a link to View Demand-Level Defenses. The Submitted Defense Documents page will display defense documents that have been submitted at the Demand Level through the CRCP for the selected Demand Letterer ID. For more information on Defenses, see the Submitted Defenses CBT.
After clicking the Request Letter Access link from the Account Detail page, the Request Letter Access page displays. The CRCP associated information is related to letters you have received from the CRC to your Account ID as part of the initial New Registration (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 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.
The navigation menu at the top of the “Home” page (and each page in the portal) provides access to 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 with your Login ID.
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 notes

About This Site navigates to the How to Use This Site link, offering general information on how to use the CRCP.
CMS Links provides links to the ‘Coordination of Benefits & Recovery Overview’ and the ‘Group Health Plan Recovery’ sections of the CMS.gov website.
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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’.
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 and defenses on the CRCP.
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Contact Us displays information on where to go for assistance with Account Setup, log-in and Password issues, technical problems, or case-specific inquiries.
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 the 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 with your account.

- View Account Activity - Used to view a history of when the following activities were completed for the selected CRCP account: New Registration (PIN Request), Account Setup, and Request Letter Access.
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.
To end your session, click Log off.
Slide notes
The Sign-off Successful page displays.
Case Search

- Search for cases using this associated Account ID
- From the Case Search page the Demand ID link can also be selected to view the Demand Detail page

Slide notes

Account Managers are able to search for cases using this associate Account ID.
Slide note

Select the Case Search link on the Account Detail Page.
To search for a specific case associated to this Account ID, enter a Case ID, and then click Search.
To search for a specific case associated to this Account ID, enter a Case ID, and then click Search. Once located, click the Case ID link to view detailed information for that case. You can also click the Demand ID link to view the Demand Detail page for the selected demand. Click Cancel to return to the Account Detail page.
Open Debt Report

- Only Available for Account Managers
- Provides a list of all cases that have an Accounts Receivable amount greater than zero
- Option to export to Excel

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Account Managers are able to view the Open Debt from the Account Detail Page which provides a list of all cases associated with the selected Account ID that have an Accounts Receivable amount greater than zero. The list of cases can also be exported to an Excel spreadsheet.
Upon Login select the account where the debt report needs to be viewed. From the Account Detail page, select Open Debt Report.

To search for a specific case associated to this Account ID, enter a Case ID, and then click Search. Once located, click the Case ID link to view detailed information for that case. You can also click the Demand ID link to view the Demand Detail page for the selected demand. Click Cancel to return to the Account Detail page.
Slide notes

Place the date range you are searching for and select search.
The Open Debt Cases will appear. You can export this report to excel by selecting the Export to Excel button.

Note: To help users better monitor demanded cases, where balances are due the following columns, have been added to the CRCP Open Debt Report page: Claim Count, Treasury Ref Date, Last Letter, Last Letter Date, and Fed Agency ID.
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This report will open in excel.
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.
Go Paperless

- Only Available for Account Managers (AM)
- Allows AM’s to request/update paperless preferences for the selected account

Slide notes

Account Managers are able to request/update paperless preferences for the selected account from the Account Detail Page.
Upon Login select the account you wish to register for the Go Paperless option. From the Account, Detail page select Go Paperless link.
The Account Manager will need to select the “Go Paperless” checkbox to begin receiving letter notification emails instead of hardcopy letters being mailed to the account. These emails will be sent to the Account Manager, Account Designees and the individual entered in the option “Paperless E-mail Address” field entered on this page. These individuals must complete the ID Proofing and Multi-Factor Authentication (MFA) process and log in using MFA to view the correspondence images. For more information on MFA, please complete the CRCP Multi-Factor Authentication course.

To opt out of the “Go Paperless” option, uncheck the Go Paperless check box (if already selected) and click Continue.
After selecting Continue, the Go Paperless Confirmation page will appear and provide the Paperless status of the account as well as the date the account was opted in, or that the account was opted out. Click OK to return to the Account Detail page.
Slide notes

All accounts that have opted in for the Go Paperless option can easily be identified by the Go Paperless green leaf that will appear by the account ID not only on the Account Detail Page but also on the Account Listing Page as well.
Letter Notifications

- Only Available for Account Managers
- Allows AM’s to view/print "Go Paperless" letter notification emails and letters

Slide notes

Account Managers are able to view/print “Go Paperless” letter notification emails and letters from the Account Detail Page.
After selecting the appropriate Account ID, select the Letter Notification link from the Account Detail page.
Slide notes

The Letter Notification page will display. From this page, you will be able to view previous emails as well as the corresponding letters that have been issued for the selected account.

Note: All letter images can be accessed anytime from the Letter Activity Tab of the Case Information Tab. See the Case Information CBT for more information.
By selecting the email image, the email will appear in a new window. To return to the Letter Notifications screen, close or minimize the window displaying the email. The email images will only be available for emails sent in the last 30 days.
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The Letters for E-Mail Date page will display if you select the “View Letter” link on the Letter Notifications page. From this page, you can select the link in the associated images column to view the corresponding letter. The Correspondence Type column identifies the letter name alongside the Case ID column which identifies the Case ID the letter is associated with. After viewing the letter, close or minimize the window to return to the Letter for E-mail Date page.
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If you have any questions or feedback on this material, please go to the following URL: