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The slide features a light blue background with abstract curved lines. In the top left corner is the CMS logo (Centers for Medicare & Medicaid Services). In the top right corner is the COB&R logo (Coordination of Benefits and Recovery). The main title is centered: 'Commercial Repayment Center Portal (CRCP) Case Information'. At the bottom left, it says 'Version 1.7, 10/10/2016' and includes a note about the most current version available at <http://go.cms.gov/cobro>.

Slide notes

Welcome to the Commercial Repayment Center Portal (CRCP) Case Information 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.

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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: <http://www.cob.cms.hhs.gov/CRCP/>.

Slide notes

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Course Overview

- How to view case specific information for a beneficiary included in a demand on the CRCP
 - Beneficiary
 - Demand
 - Employer and Insurer
 - Financial
 - Letter Activity
 - Defense History
 - Submitted Documents

Slide notes

This course explains how to view case specific information for a beneficiary included in a demand on the CRCP.

It describes how to utilize the Case Information page to see the following case-related information: beneficiary, demand, employer and insurer, financial, letter activity, defense history and submitted documents.

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Background

- CRC issues a demand to recover money in cases where Medicare paid primary but the GHP had primary payment responsibility
- Demand generally includes multiple beneficiaries (cases)
- View *CRCP Case Information* page to see information on a particular case that is included in a demand

Slide notes

If Medicare paid primary when the Group Health Plan (GHP) had primary payment responsibility, the Commercial Repayment Center (CRC) will seek repayment on behalf of CMS.

When the CRC issues a demand letter for payment, the demand may include multiple beneficiaries/cases.

To review information on a particular beneficiary/case that is included in a demand, you will access the Case Information page on the CRCP.

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The screenshot shows the 'Account Listing' page of the Commercial Repayment Center Portal. The page header includes the CMS logo (Centers for Medicare & Medicaid Services) and the COB&R logo (Coordination of Benefits and Recovery). A navigation bar contains links for 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' link. Below the title, there is a paragraph explaining that the page lists Account IDs associated with the user's Login ID and provides instructions on how to view TINs. A table with three columns is displayed: 'Account ID', 'Company Name', and 'Associated TINs'. The table contains one row with a blue link in the 'Account ID' column and a 'View TINs Listing' link in the 'Associated TINs' column. At the bottom of the page, there is a footer with links for 'Privacy Policy' and 'User Agreement'.

Slide notes

To review beneficiary/case information, log into the CRCP at the following link:

<https://www.cob.cms.hhs.gov/CRCP/>. After a successful login, the Account Listing page displays.

This page lists the accounts associated to your Login ID. Select the Account ID link for the account you want to access.

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The screenshot shows the 'Account Detail' page of the 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 menu includes 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 'Account Detail' and includes a 'Quick Help' icon. The text indicates that an account ID has been selected and provides instructions on how to access different account IDs. Below this, there are three 'Available Actions' boxes: 'Demand Listing' (for viewing demands or submitting defense documentation), 'PPN Listing' (for viewing or submitting a Primary Payment Notice), and 'Request Letter Access' (for requesting access to information related to a letter). A 'Previous' button is located at the bottom left of the main content area. At the very bottom of the page, there are links for 'Privacy Policy' and 'User Agreement'.

Slide notes

When the Account Detail page displays, click the Demand Listing link.

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Demand Listing [Quick Help](#)

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**.

Demand Letter ID: Demand Letter ID Search Hint

Demand Letter Sent Date From: / / (MM/DD/YYYY)

Demand Letter Sent Date To: / / (MM/DD/YYYY) From and To Date Search Hint

Demand Letters Issued to Companies Associated with Account ID: 111111 Results Returned: 5

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.

Viewed	Demand Letter ID	Number of Cases	Letter Date	Demand Status
Yes	[Redacted]	1	04/13/2014	Open
Yes	[Redacted]	1	04/11/2014	Open
Yes	[Redacted]	1	04/10/2014	Open
No	[Redacted]	1	04/09/2014	Open
	[Redacted]	1	04/08/2014	Closed

Slide notes

The Demand Listing page displays. By default, this page lists all unresolved/open demands that the CRC has issued in the past 3 months.

You may search for any Demand Letter ID using the Search function. See the "Demands" CBT for more information.

Note: No more than 100 letters will display at any given time.

To view case specific information, first locate the Demand Letter ID that includes the case you want to examine and then click the Demand Letter ID link. Note: this link will only be enabled if the Demand Status is 'Open'.

You will not be able to view beneficiary/case information if the Demand Status is 'Closed'. The Demand Status is 'Closed' when the status of each case included in a Demand Letter ID is 'Closed'.

If you need information regarding a demand that has been closed, contact the CRC at 1-855-798-2627.

Note: A Viewed column was added to this page to help identify when new Demands or PPNs have been added to the account.

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Demand Detail [Quick Help](#)

You have selected Demand Letter ID: [REDACTED]

The Total Demand Amount originally included on this letter was: [REDACTED]

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](#)

HICN: [HICN 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	HICN	Beneficiary First Name	Beneficiary Last Name	Case Amount	Case Status	Date Closed	Case Viewed
<input type="checkbox"/>	[REDACTED]	[REDACTED]	First	Last	[REDACTED]	Open		No
<input type="checkbox"/>	[REDACTED]	[REDACTED]	First	Last	[REDACTED]	Open		No
<input type="checkbox"/>	[REDACTED]	[REDACTED]	First	Last	[REDACTED]	Open		Yes
<input type="checkbox"/>	[REDACTED]	[REDACTED]	First	Last	[REDACTED]	Open		Yes
<input type="checkbox"/>	[REDACTED]	[REDACTED]	First	Last	[REDACTED]	Closed	05/10/2016	Yes

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Once you click the Demand Letter ID link, the Demand Detail page displays. This page lists all of the beneficiaries/Case IDs included in the demand letter.

For each beneficiary included in the demand, a masked Health Insurance Claim Number (HICN) is displayed along with the Beneficiary Name, Case Amount, Case Status, Date Closed and Case Viewed fields.

Click a Case ID link to view detailed case information for the selected case.

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Case Information

Quick Help

The information displayed on this page is related to Case ID: ##### which is included on Demand Letter ID: 123456789. To search for a different Case ID included in this Demand, click **Previous** to return to the Demand Detail page.

Please note: The information displayed on these pages is current as of: 12/09/2013.

Case Details

Beneficiary Information	
Beneficiary Name:	Last Name
HICN:	*****9099A
Insurance Group ID:	A122345678
Insurance Policy ID:	Not on File

Employer Information	
Employer Name:	Blue Cross
Employer TIN:	0243567899

Demand Information	
Total Demand Amount:	\$51,100.45
Case Demand Amount:	\$2300.99
Case Outstanding Balance:	\$490.76
Case Status:	Demand Issued
Date Closed:	

Insurer Information	
Insurer Name:	Not on File
Insurer TIN:	Not on File

Financial Summary
Letter Activity
Defense History
Submitted Documents

Defenses submitted to the CRC through the portal or through the mail for the selected Case ID are listed here.

Document ID (Incoming Defense)	Defense Number	Defense Received	Letter ID (Outgoing Response)	Decision	Decision Date	Viewed
86123654	21445587	01/02/2014	123654789	Partial	02/24/2014	No
86123444	21445583	01/03/2014	123654789	Invalid	02/22/2014	Yes
86123634	21445287	03/22/2014		Pending		

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Demand Listing

Slide notes

The Case Information page displays. The Case ID and Demand Letter ID are shown at the top of the page. If you have selected the incorrect Case ID, click Previous to return to the Demand Detail page.

All information included on the Case Information page is current as of the date noted at the top of the page. If you have any questions regarding information included on this page, please contact the CRC at 1-855-798-2627.

The Case Details section of this page is broken into four sections: Beneficiary, Demand, Employer and Insurer. The Beneficiary Information section includes the Beneficiary’s Name, masked HICN, Insurance Group ID and Insurance Policy ID.

The Demand Information section includes the Total Demand Amount, Case Demand Amount, Case Outstanding Balance and Case Status.

The Employer Information and Insurer Information sections include the company name and Tax Identification Number (TIN) for the employer and the insurer (if it is available).

Note: If there is no data to display for a particular field in the Case Details section, the CRCP will show the phrase ‘Not on File’.

The bottom half of Case Information page includes tabbed sections where you can view information regarding the financial summary, letter activity, defense history and submitted documents for the case.

Note: A Demand Listing button has been added to this page for simpler navigation back to the Demand Listing page.

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Case Details

Beneficiary Information		Demand Information	
Beneficiary Name:	XXXXXXXXXX	Total Demand Amount:	XXXXXXXXXX
HICN:	XXXXXXXXXX	Case Demand Amount:	XXXXXXXXXX
Insurance Group ID:	XXXX	Case Outstanding Balance:	\$0.00
Insurance Policy ID:	XXXXXXXXXX	Case Status:	Ltr Sent

Employer Information		Insurer Information	
Employer Name:	XXXXX INC	Insurer Name:	XXXXXXXXXX
Employer TIN:	XXXXXXXXXX	Insurer TIN:	XXXXXXXXXX

Financial Summary
Letter Activity
Defense History
Submitted Documents

Account Receivable Date:	05/02/2014	Interest Rate:	XXXXXXXXXX
Principal Collected:	\$0.00	Interest Start Date:	02/04/2014
Adjusted Amount:	\$0.00	Interest Accrued:	\$0.00
		Interest Collected:	\$0.00

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Slide notes

The Financial Summary tab shows the Account Receivable Date, Principal Collected, Adjusted Amount, Interest Rate, Interest Start Date, Interest Accrued and Interest Collected for the case.

Click the Letter Activity tab to view letter activity for the case.

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Case Details

Beneficiary Information		Demand Information	
Beneficiary Name:	[REDACTED]	Total Demand Amount:	[REDACTED]
HICN:	[REDACTED]	Case Demand Amount:	[REDACTED]
Insurance Group ID:	[REDACTED]	Case Outstanding Balance:	\$0.00
Insurance Policy ID:	[REDACTED]	Case Status:	Ltr Sent

Employer Information		Insurer Information	
Employer Name:	[REDACTED]	Insurer Name:	[REDACTED]
Employer TIN:	[REDACTED]	Insurer TIN:	[REDACTED]

Financial Summary
Letter Activity
Defense History
Submitted Documents

Letter Activity Not Sorted			
Correspondence ID (Letter/Document)	Date Received at CRC	Date Sent from CRC	Letter Description
[REDACTED]		05/02/2014	GHP DEMAND LETTER

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Slide notes

The Letter Activity tab shows all incoming and outgoing correspondence related to the Case ID, except correspondence related to a defense.

For correspondence sent to the CRC, you will see the Document ID (in the Correspondence ID column), date received at the CRC and the letter description.

For correspondence that the CRC has sent, you will see the Letter ID (in the Correspondence ID column), the date sent from the CRC and the letter description. Click on any column heading to sort the information displayed.

To view correspondence related to a defense, click the Defense History tab.

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Case Details

Beneficiary Information	
Beneficiary Name:	XXXXXXXXXX
HICN:	XXXXXX
Insurance Group ID:	
Insurance Policy ID:	XXXXXXXXXXXX

Employer Information	
Employer Name:	XXXXX XXXXXXXX
Employer TIN:	XXXXXX

Demand Information	
Total Demand Amount:	XXXXXX.XX
Case Demand Amount:	XXXXXX.XX
Case Outstanding Balance:	\$0.00
Case Status:	Ltr Sent

Insurer Information	
Insurer Name:	XXXXXXXXXX XXXXX XXXX
Insurer TIN:	XXXXXX

Financial Summary Letter Activity **Defense History** Submitted Documents

Defenses submitted to the CRC through the portal or through the mail for the selected Case ID are listed.

Document ID (Incoming Defense)	Defense Number	Defense Received	Letter ID(Outgoing Response)	Decision	Decision Date
#####	#####	01/02/2014	#####	Partial	02/24/2014
#####	#####	01/03/2014	#####	Invalid	02/22/2014
#####	#####	03/22/2014		Pending	

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Slide notes

The Defense History tab lists information regarding defenses that you have submitted through the CRCP as well as those defenses you have sent to the CRC by mail for the selected Case ID.

For each defense you have submitted, the Document ID, Defense Number and Defense Received date is shown. The Defense Number is the number assigned by the CRC to your defense correspondence.

The Defense Received date is the date the CRC received the incoming defense correspondence. If the CRC has responded to your defense, the Letter ID for the response is displayed.

The decision included in the response letter (e.g., Invalid, No Decision Necessary, Partial, or Valid) and the date the CRC made the decision will also be shown.

Until the CRC makes a decision regarding the defense, a value of 'Pending' will be displayed in the Decision column and the Letter ID and Decision Date will be blank. You can sort the information by clicking any column heading.

Click the Submitted Documents tab to view files that were submitted on the CRCP.

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Case Details

Beneficiary Information		Demand Information	
Beneficiary Name:	XXXXXXXXXX	Total Demand Amount:	XXXXXX
HICN:	XXXXXX	Case Demand Amount:	XXXXXX
Insurance Group ID:		Case Outstanding Balance:	\$0.00
Insurance Policy ID:	XXXXXXXXXX	Case Status:	Ltr Sent

Employer Information		Insurer Information	
Employer Name:	XXXXXXXXXX	Insurer Name:	XXXXXXXXXX
Employer TIN:	XXXXXX	Insurer TIN:	XXXXXX

[Financial Summary](#)
 [Letter Activity](#)
 [Defense History](#)
 Submitted Documents

Submitted Documents	Submitted Date
Document.pdf	10/10/2014
Document.pdf	10/11/2014
Document.pdf	10/12/2014

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Slide notes

The Submitted Documents tab shows the Document Name and Submitted Date for each file you have submitted through the CRCP for the selected Case ID.

You cannot view or download the submitted documentation. Click either column heading to sort the information displayed. Click Previous at any time to return to the Demand Detail page.

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You have completed the CRCP Case Information course. Information in this course can be referenced by using the CRCP User Guide found under the *Reference Materials* menu at the following link:

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

Slide notes

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