

PIN Request

Slide 1 of 23 - PIN Request

CMS
CENTERS FOR MEDICARE & MEDICAID SERVICES

COB&R
Coordination of
Benefits and Recovery

Commercial Repayment Center Portal (CRCP) PIN Request

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) Personal Identification Number (PIN) Request 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 (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: [CRCP Website](https://www.cob.cms.hhs.gov/CRCP/).

Slide 3 of 23 - Course Overview

Course Overview

- Registration and Account Setup - 2 Steps
 - Step 1 - PIN Request
 - CRCP User Roles
 - Authorized Representative's next steps
 - Step 2 - Account Setup
 - See "Account Setup" course



Slide notes

The CRCP requires a two-step process to register and setup a new account:

Step 1: PIN Request (performed by the Authorized Representative, or another person on the Authorized Representative's behalf) and Step 2: Account Setup (performed by the Account Manager).

This module reviews the PIN Request process, including the CRCP User Roles and Authorized Representative's next steps after PIN Request completion. See the "Account Setup" course for information on Step 2.

Slide 4 of 23 - Authorized Representative

Authorized Representative

- Legal authority to bind the company to a contract and the terms of the CRCP requirements
- Note: If the person named as the Authorized Representative needs to be replaced after the registration has been completed, the Account Manager can make the change on the CRCP

Slide notes

To begin, the employer/insurer entity must identify the Authorized Representative.

The Authorized Representative is the individual who has the legal authority to bind the company to the contract and the terms of CRCP requirements and processing.

Note: If the person named as the Authorized Representative needs to be replaced after the PIN Request has been completed, the Account Manager can make the change on the CRCP.

Slide 5 of 23 - Authorized Representative

Authorized Representative

- Complete the PIN Request
- Designate the Account Manager
- Approve Account Setup
- Sign and return the Profile Report

Slide notes

The Authorized Representative, or someone approved by the Authorized Representative, must complete the PIN Request on the CRCP and provide all of the information requested by the system.

This person is responsible for designating the Account Manager.

Additionally, the Authorized Representative must approve the Account Setup, by physically signing the Profile Report and returning it to the Benefits Coordination & Recovery Center (BCRC) Electronic Data Interchange (EDI) Department. The Profile Report is generated after the Account Setup process is completed.

It includes all information previously recorded during the PIN Request, and any additional information provided during the account setup.

Slide 6 of 23 - Authorized Representative

Authorized Representative

- Cannot be a CRCP user
 - Cannot be the Account Manager or Account Designee
- Can register as the Authorized Representative for more than one CRCP account

Slide notes

The Authorized Representative cannot be an actual user of the CRCP, that is, cannot be the Account Manager or Account Designee. However, he or she can register as the Authorized Representative for more than one CRCP account.

Please note: Only those individuals who are assigned the role of an Account Manager or Account Designee can access and use the CRCP.

Slide 7 of 23 - Account Manager and Account Designee

Account Manager and Account Designee

- Account Manager (only) functions
 - Complete Account Setup
 - Administer the CRCP account
 - Invite other users (Account Designees to assist)
- Account Manager and Account Designee functions
 - Track GHP recovery cases
 - Submit documented defenses

Slide notes

The Account Manager is assigned by the Authorized Representative.

This individual is responsible for completing Account Setup, administering the account on the CRCP, and inviting others to assist as Account Designees.

Both the Account Manager and the Account Designee have the ability to track Group Health Plan (GHP) recovery cases and submit documented defenses.

Slide 8 of 23 - PIN Request on the CRCP

PIN Request on the CRCP

- PIN Request requires
 - Account Type selection
 - Company Tax Identification Number (TIN)
 - Authorized Representative contact information
 - Name, Job Title, Address, Phone and E-mail
 - Letter Information (Defense or Demand)
 - Letter ID
 - Key piece of information from the letter

Slide notes

Once the Authorized Representative has been identified, they may complete the PIN Request process.

The PIN Request will require selection of the Account Type (Employer and Other Plan Sponsors or Insurers and Claims Processing Third Party Administrators), Company Tax Identification Number or TIN; Authorized Representative contact information, that is, Name, Job Title, Address, Phone and E-mail; and letter information.

To supply the letter information, the Authorized Representative will need one of the following letters that was received from the Commercial Repayment Center (CRC): Defense or Demand.

The Authorized Representative will need the Letter ID and a key piece of information from that letter.

Slide 9 of 23 - Login Warning Page

Slide notes

The Authorized Representative, or another person on the Authorized Representative’s behalf, will begin the PIN Request process by going to the CRCP URL at: <https://www.cob.cms.hhs.gov/CRCP/>.

Each time a user visits the CRCP Web site, the Login Warning page displays. This page provides information about CRCP security measures including access, penalty and privacy laws.

This page can be printed from the CRCP by clicking the Print this page link on the Web site. Scroll to the bottom of this page to review the entire statement.

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 10 of 23 - Welcome Page

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Welcome to the CRCP

The Commercial Repayment Center Portal (CRCP) is a secure web-based system that provides Employers/Other Plan Sponsors and Insurers/Third Party Administrators with a way to manage their Group Health Plan (GHP) recovery activities more efficiently. With the use of this portal, users may view demand information on line and submit defense documentation electronically.

For information about the availability of auxiliary aids and services, please visit:
<http://www.medicare.gov/about-us/nondiscrimination/nondiscrimination-notice.html>

CRCP Messages

The CRCP will be unavailable nightly from approximately midnight - 4am Eastern Standard Time.

Getting Started

To use this application, you must complete a two-step registration process to request a Personal Identification Number (PIN) and set up an account. For more information, please refer to the How to Get Started help document, located under the How To menu on the Navigation bar. To begin the registration process, click the PIN Request button.

Step 1
PIN Request
(Letter ID and TIN required)

Step 2
Account Setup
(Account ID and PIN required)

Sign in to your account:

Login ID:

[Forgot Login ID](#)

Password:

[Forgot Password](#)

Slide notes

The Welcome to the CRCP page will display. Click PIN Request to initiate this process.

Slide 11 of 23 - Personal Identification Number (PIN) Request Page

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Personal Identification Number (PIN) Request [Quick Help](#)

The information requested on this page will be used to verify that the registrant has the correct credentials to register the entity for a Commercial Repayment Center Portal (CRCP) account. In order to complete the PIN Request, you will need one of the following letters from the Commercial Repayment Center: Defense or Demand Letters.

At the successful completion of the PIN Request, you will be provided with an Account ID and mailed a PIN which will be used by your Account Manager to complete the final part of the registration process and set up the account. When you have completed your entry, click **Continue** to proceed. Click **Cancel** to cancel the PIN Request process.

An asterisk (*) indicates a required field.

Company Information

* Select the type of Account for which you are registering: -Please Select-

* Company Tax Identification Number (TIN):

Letter Information

Enter and re-enter the Letter ID for the letter you are using to request a PIN: Entry Hint

* Letter ID:

* Re-enter Letter ID:

* Select the type of letter you are using to request the PIN and provide the required key piece of information for that letter type: Entry Hint

Defense Letter - Enter the Case ID:

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

Cancel Continue

Slide notes

The Personal Identification Number (PIN) Request page displays.

The information entered on this page will be used to verify that you have the appropriate credentials to create a CRCP account. All fields denoted with an asterisk are required.

Click the drop-down arrow to select the type of account you are registering for: employer (applies to employers and other plan sponsors) or insurer (applies to insurers and claims processing Third Party Administrators or TPAs). Enter the 9-digit Company TIN.

A masked TIN is found in the upper left corner of the Defense or Demand letter in the “Regarding” section of the letter.

Note: The CRCP will not allow the Authorized Representative to complete the PIN Request with a blank TIN. The TIN supplied is used to authenticate the registrant prior to establishing the CRCP account.

Enter and re-enter the Letter ID for the letter you are using to request the PIN. The Letter ID is a number that begins with ‘86’.

This number can be found in the upper left corner of the Defense or Demand letter in the “Regarding” section of the letter.

You must enter all numbers when you are keying the Letter ID on this page. Spaces and special characters are not allowed.

Slide 12 of 23 - Personal Identification Number (PIN) Request Page

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Personal Identification Number (PIN) Request Quick Help

The information requested on this page will be used to verify that the registrant has the correct credentials to register the entity for a Commercial Repayment Center Portal (CRCP) account. In order to complete the PIN Request, you will need one of the following letters from the Commercial Repayment Center: Defense or Demand Letters.

At the successful completion of the PIN Request, you will be provided with an Account ID and mailed a PIN which will be used by your Account Manager to complete the final part of the registration process and set up the account. When you have completed your entry, click **Continue** to proceed. Click **Cancel** to cancel the PIN Request process.

An asterisk (*) indicates a required field.

Company Information

* Select the type of Account for which you are registering: -Please Select-

* Company Tax Identification Number (TIN):

Letter Information

Enter and re-enter the Letter ID for the letter you are using to request a PIN: Entry Hint

* Letter ID:

* Re-enter Letter ID:

* Select the type of letter you are using to request the PIN and provide the required key piece of information for that letter type: Entry Hint

Defense Letter - Enter the Case ID:

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

Cancel Continue

Slide notes

Next, select the radio button for the type of letter (Defense or Demand) you are using to request a PIN.

Finally, include the required key piece of information for that letter type. You can locate this information at the top of each letter in the “Regarding” section.

If you are using a Defense Letter, enter the Case ID. If the Case ID begins with a ‘C’, include these characters when you enter the Case ID.

For a Demand Letter, enter the Total Debt Due printed on the letter. Enter the dollar amount in the Dollars field and the two-digit cents amount in the Cents field. Do not enter the dollar symbol or the decimal.

After all required information has been entered, click Continue.

Note: If at any point during the PIN Request process you wish to stop, click Cancel.

Once clicked, a Cancel Confirmation page displays where you will be given the opportunity to continue with the cancel request or return and complete the PIN Request process.

Slide 13 of 23 - Validation

Validation

- System validates each field
 - If errors are found, the system displays a message indicating what error(s) were found
 - You must correct the error before proceeding
 - System revalidates the data once it has been entered

Slide notes

The system will validate each field on each PIN Request page for accuracy and completeness.

If errors are found, the system displays applicable error messages on the screen indicating what error condition or conditions were found.

When errors are discovered, you must correct the error before the system will allow you to proceed. Once the data has been corrected, the system will revalidate all data that has been entered.

Slide 14 of 23 - Contact Us Page

The screenshot shows the 'Contact Us' page of the Commercial Repayment Center Portal. At the top left is the CMS logo (Centers for Medicare & Medicaid Services). At the top center is the text 'Commercial Repayment Center Portal'. At the top right is the COB&R logo (Coordination of Benefits and Recovery). Below the logos are two buttons: 'Print this page' and 'Close'. The main content area is titled 'Contact Us' and contains two sections:

- Contact the Benefits Coordination & Recovery Center (BCRC)**
If you have a problem with Account Setup, Login or Password issues or other technical problems using the CRCP, please contact an EDI Representative at the BCRC. EDI Representatives are available to assist you Monday through Friday, from 9:00 a.m. to 5:00 p.m., Eastern Time, except holidays, at: (646) 458-6740.
- Contact the Commercial Repayment Center (CRC)**
If you need assistance regarding a Documented Defense or specific information related to a Group Health Plan recovery case, please contact the CRC. CRC Customer Service Representatives are available to assist you Monday through Friday, from 9:00 a.m. to 8:00 p.m., Eastern Time, except holidays, at toll-free lines: 1-855-798-2627 (TTY/TDD: 1-655-797-2627 for the hearing and speech impaired).

Slide notes

If the Letter ID, key data element and/or TIN entered on the PIN Request page cannot be matched to a record in the CRCP, the Contact the Commercial Repayment Center (CRC) page displays.

Contact a CRC Customer Service Representative at 1-855-798-2627 for assistance. After you have resolved the issue, you may attempt the PIN Request process again.

Slide 15 of 23 - Authorized Representative (AR) Information Page

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Authorized Representative (AR) Information [Quick Help](#)

The person named on this page should be the individual in the organization who has the legal authority to bind the organization to a contract and the terms of CRCP requirements. This individual will not be able to access the CRCP application and cannot be a user of this system.

The AR must approve the organization's profile during the initial account setup and through any subsequent changes. Please refer to the Data Use Agreement in the CRCP User Guide to make sure the person named as the entity's AR has the authority to sign this agreement.

When you have completed your entry, click **Continue** to proceed. Click **Cancel** to cancel the PIN Request process. If you click **Cancel**, all data will be lost.

An asterisk (*) indicates a required field.

*AR First Name:	<input type="text"/>	MI:	<input type="text"/>	*Last Name:	<input type="text"/>		
*AR Title:	<input type="text"/>						
*AR E-Mail Address:	<input type="text"/>						
*Re-enter AR E-Mail Address:	<input type="text"/>						
* AR Phone:	<input type="text"/>	-	<input type="text"/>	-	<input type="text"/>	- Ext	<input type="text"/>
Fax:	<input type="text"/>	-	<input type="text"/>	-	<input type="text"/>	<input type="text"/>	

[Privacy Policy](#) | [User Agreement](#)

Slide notes

If the Letter ID, key data element and/or TIN entered on the PIN Request page cannot be matched to a record in the CRCP, the Contact the Commercial Repayment Center (CRC) page displays.

After successfully completing the PIN Request page, the Authorized Representative (AR) Information page displays. Information related to the Authorized Representative must be entered on this page.

It is critical that you enter the correct contact information for the Authorized Representative, including his/her correct e-mail address.

If you enter the e-mail address of the Account Manager or Account Designee instead of the e-mail address of the Authorized Representative, those individuals will be unable to register as users of the CRCP.

Note: The Authorized Representative can only have that one role in the CRCP. This person cannot be an Account Manager or an Account Designee.

The CRCP will verify that the submitted e-mail address for the Authorized Representative does not match an e-mail address for any CRCP Account Manager or Account Designee, otherwise an error will display.

After entering the Authorized Representative information, click Continue to proceed.

Slide 16 of 23 - PIN Request Summary Page

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PIN Request Summary Quick Help

Please verify that the information displayed on this page is correct. If any changes are necessary, click the **Edit** button next to the section that requires modifications. If you are satisfied with the information, click **Continue**. Click **Cancel** to cancel the PIN Request process. If you click **Cancel**, all data will be lost. You may print this page for your records.

Personal Identification Number (PIN) Request Information	Edit
Account Type:	Insurer Insurers and Claims Processing Third Party Administrators (TPAs)
Company Tax Identification Number (TIN):	123456789
Letter ID:	862233445566
Letter Type:	Demand Letter
Letter Key:	03/17/2014

Authorized Representative (AR) Information	Edit
AR Name:	First Name M Last Name
AR Title:	Auth Rep
E-mail Address:	pinrequest@emaildomain.com
Phone:	(123) 111 - 1234 Ext: 34567
Fax:	(111) 111 - 1111

Company Information	
Company Name:	ACME Insurance

[Cancel](#) [Continue](#)

Slide notes

The PIN Request Summary page displays. You can print this page by clicking the Print this page link.

This page lists all of the information that was previously entered. Review and verify all information before continuing.

To make any corrections, click the Edit button next to the applicable section. The system will display that entry information page.

For example, to change information entered on the Personal Identification Number or PIN Request page, click the Edit button displayed next to that page heading.

Slide 17 of 23 - PIN Request Summary Page

The image shows two overlapping screenshots of the CMS Commercial Repayment Center Portal. The top screenshot displays the 'Authorized Representative (AR) Information' page, which includes instructions and a form with fields for AR First Name, Title, E-Mail Address, Re-enter AR E-Mail Address, AR Phone, and Fax. A 'Continue' button is highlighted with a red box. The bottom screenshot displays the 'PIN Request Summary' page, which shows a summary of the entered information in a table format. A 'Continue' button is also highlighted with a red box. A large red arrow points from the 'Continue' button in the top screenshot to the 'Continue' button in the bottom screenshot.

Authorized Representative (AR) Information

The person named on this page should be the individual in the organization who has the legal authority to bind the organization to a contract and the terms of CRCP requirements. This individual will not be able to access the CRCP application and cannot be a user of this system.

The AR must approve the organization's profile during the initial account setup and through any subsequent changes. Please refer to the Data Use Agreement in the CRCP User Guide to make sure the person named as the entity's AR has the authority to sign this agreement.

When you have completed your entry, click Continue to proceed.

An asterisk (*) indicates a required field.

*AR First Name:

*AR Title:

*AR E-Mail Address:

*Re-enter AR E-Mail Address:

*AR Phone:

Fax:

Cancel **Continue**

PIN Request Summary

Please verify that the information displayed on this page is correct. If any changes are necessary, click the Edit button next to the section that requires modifications. If you are satisfied with the information, click Continue. Click Cancel to cancel the PIN Request process. If you click Cancel, all data will be lost. You may print this page for your records.

Personal Identification Number (PIN) Request Information		Edit
Account Type:	Insurer - Insurers and Claims Processing, Third Party Administrators (TPAs)	
Company Tax Identification Number (TIN):	103456789	
Letter ID:	882283440356	
Letter Type:	Demand Letter	
Letter Key:	05/17/2014	

Authorized Representative (AR) Information		Edit
AR Name:	First Name M Last Name	
AR Title:	Auth Rep	
E-mail Address:	pinrequest@cmaltdomain.com	
Phone:	(123) 111 - 1234 Ext: 34567	
Fax:	(111) 111 - 1111	

Company Information	
Company Name:	ACME Insurance

Cancel **Continue**

Slide notes

When the Personal Identification Number (PIN) Request page displays, add, change, or delete any information.

Once all corrections have been made, click Continue until you have navigated back to the PIN Request Summary page.

Slide 18 of 23 - PIN Request Summary Page

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PIN Request Summary [Quick Help](#)

Please verify that the information displayed on this page is correct. If any changes are necessary, click the **Edit** button next to the section that requires modifications.

If you are satisfied with the information, click **Continue**. Click **Cancel** to cancel the PIN Request process. If you click **Cancel**, all data will be lost. You may print this page for your records.

Personal Identification Number (PIN) Request Information		Edit
Account Type:	Insurer Insurers and Claims Processing Third Party Administrators (TPAs)	
Company Tax Identification Number (TIN):	123456789	
Letter ID:	862233445566	
Letter Type:	Demand Letter	
Letter Key:	03/17/2014	

Authorized Representative (AR) Information		Edit
AR Name:	First Name M Last Name	
AR Title:	Auth Rep	
E-mail Address:	pinrequest@emaildomain.com	
Phone:	(123) 111 - 1234 Ext: 04567	
Fax:	(111) 111 - 1111	

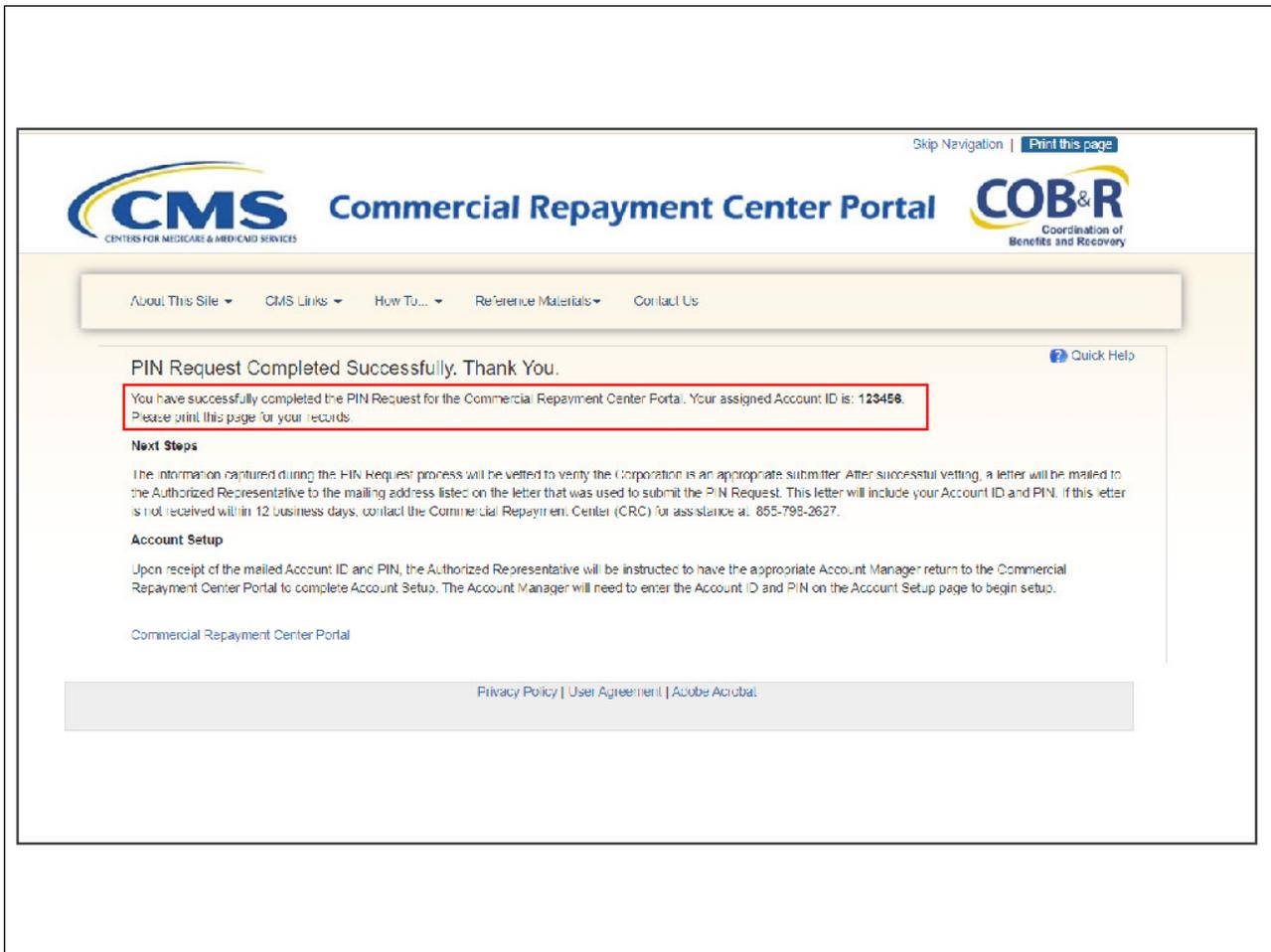
Company Information	
Company Name:	ACME Insurance

Cancel **Continue**

Slide notes

When the PIN Request Summary information has been verified, click Continue to submit the PIN Request.

Slide 19 of 23 - PIN Request Completed Successfully Page



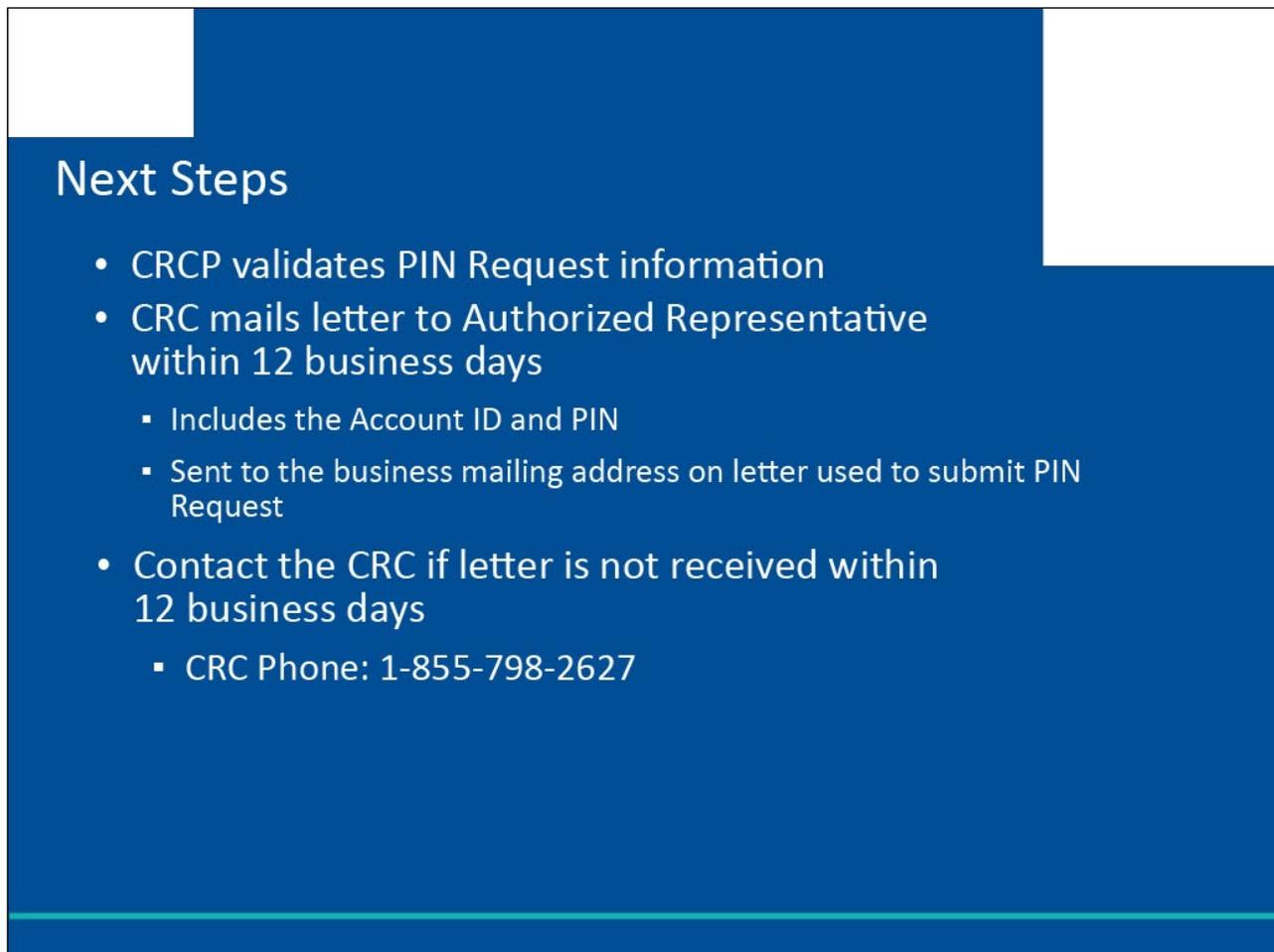
Slide notes

The PIN Request Completed Successfully Thank You page displays confirming that the PIN Request has been successfully submitted.

The assigned Account ID is displayed on the PIN Request Completed Successfully Thank You page. It is recommended that you print this page for your records.

Click the Commercial Repayment Center Portal link to return to the Welcome to the CRCP page.

Slide 20 of 23 - Next Steps



Next Steps

- CRCP validates PIN Request information
- CRC mails letter to Authorized Representative within 12 business days
 - Includes the Account ID and PIN
 - Sent to the business mailing address on letter used to submit PIN Request
- Contact the CRC if letter is not received within 12 business days
 - CRC Phone: 1-855-798-2627

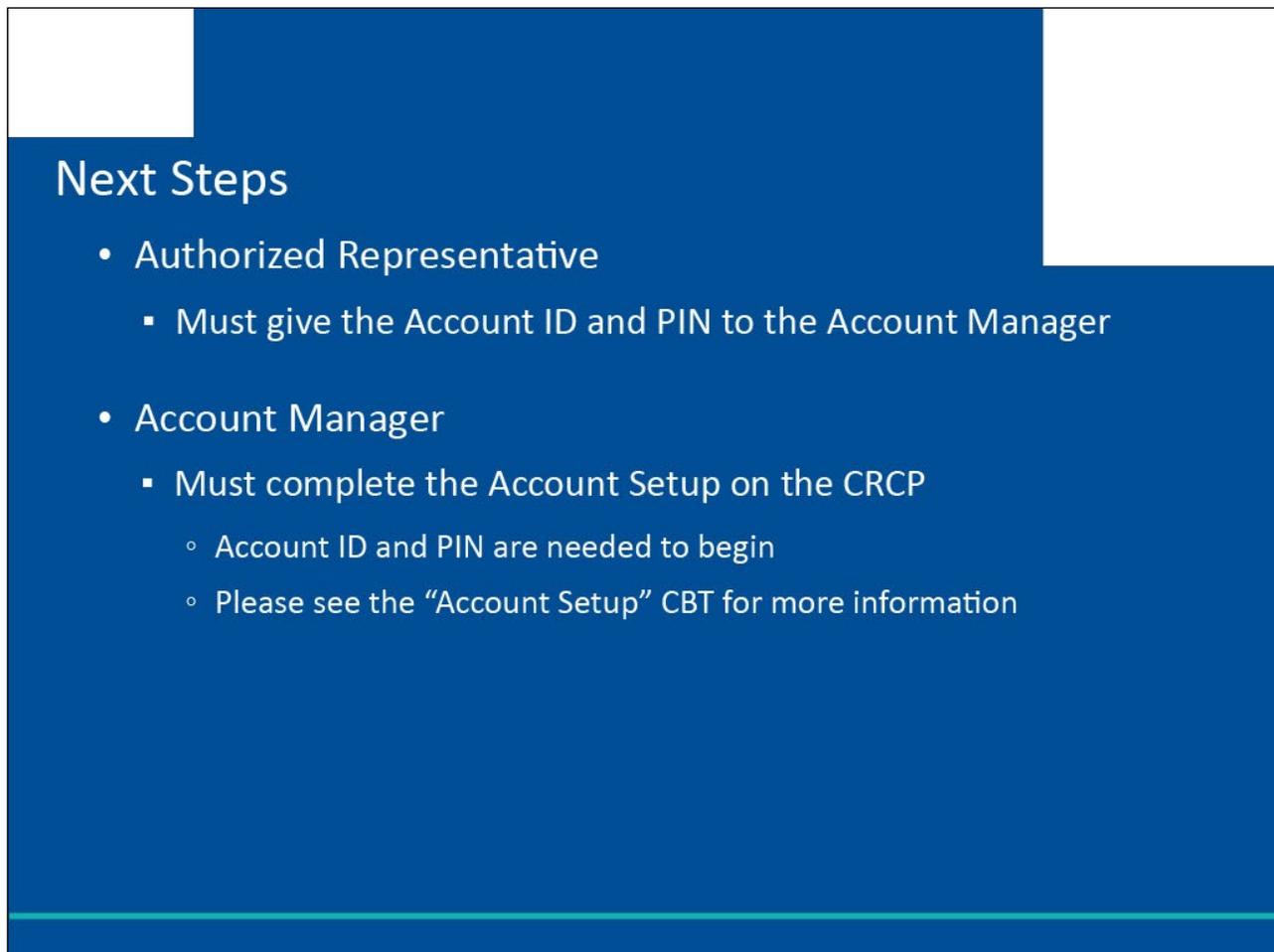
Slide notes

The information submitted in the PIN Request step will be vetted by the CRCP to ensure it is valid and complete. Within 12 business days, the CRC will mail a letter to the Authorized Representative.

This letter will include the Account ID, PIN and instructions for Account Setup. It will be sent to the business mailing address on the letter that was used to submit the PIN Request.

If this letter is not received within 12 business days, contact a CRC Customer Service Representative at 1-855-798-2627.

Slide 21 of 23 - Next Steps



Next Steps

- Authorized Representative
 - Must give the Account ID and PIN to the Account Manager
- Account Manager
 - Must complete the Account Setup on the CRCP
 - Account ID and PIN are needed to begin
 - Please see the “Account Setup” CBT for more information

Slide notes

The Authorized Representative must give the Account ID and PIN to the Account Manager for the account to use to complete the Account Setup. The Account Manager must return to the CRCP to complete the Account Setup.

The Account Manager will need to enter the Account ID and PIN to begin account setup. For more information on the Account Setup process, please see the “Account Setup” CBT.

Slide 22 of 23 - Conclusion



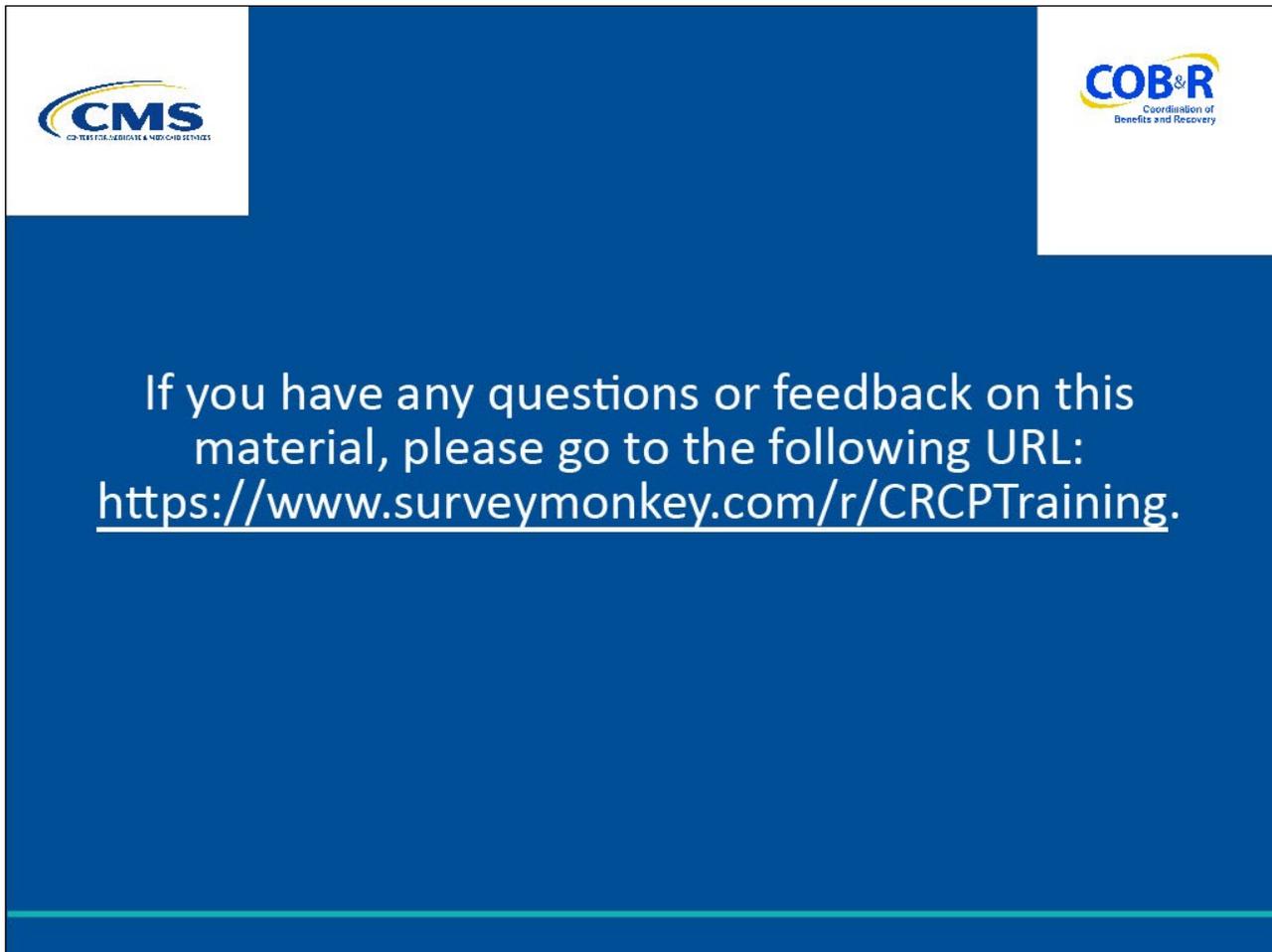
You have completed the CRCP PIN Request course. Information in this course can be referenced by using the CRCP User Guide found under the *Reference Materials* menu at the following link:

<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: [CRCP Website](https://www.cob.cms.hhs.gov/CRCP/).

Slide 23 of 23 - Survey



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).