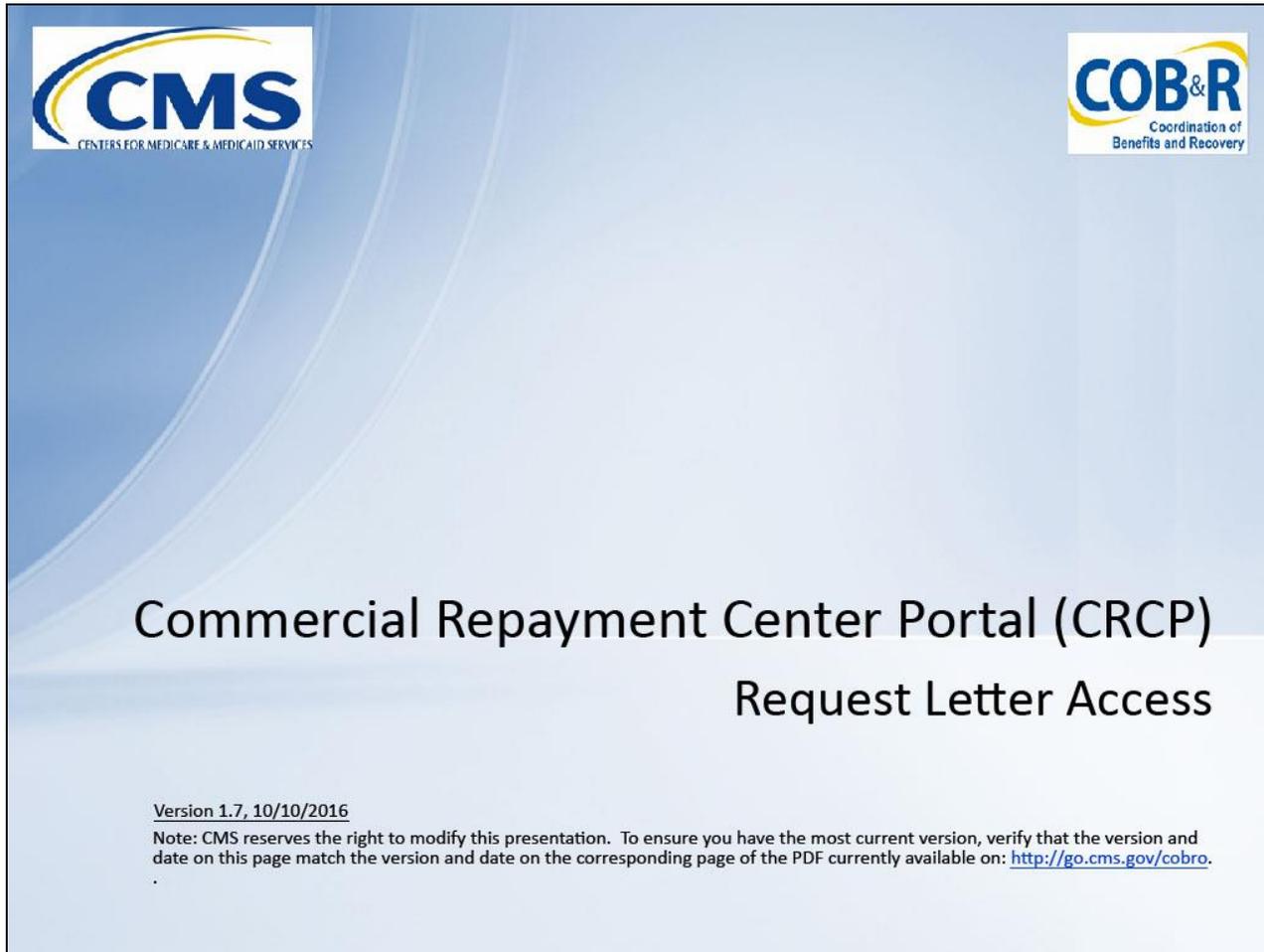


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The slide features a light blue background with a subtle wave pattern. In the top left corner is the CMS logo (Centers for Medicare & Medicaid Services). In the top right corner is the COB&R logo (Coordination of Benefits and Recovery). The main title is centered in a large, black, sans-serif font. Below the title is a version number and a note about the presentation's currency, including a URL to the PDF version.

CMS
CENTERS FOR MEDICARE & MEDICAID SERVICES

COB&R
Coordination of
Benefits and Recovery

Commercial Repayment Center Portal (CRCP) Request Letter Access

Version 1.7, 10/10/2016
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) Request Letter Access 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: <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.

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Course Overview

- Request Letter Access process
 - How to associate data related to a letter to your CRCP account
- Remove letter information from your CRCP account

Slide notes

This course will explain how to use the Request Letter Access process to associate data related to a letter to your CRCP account.

This course will also explain how to remove letter information that was incorrectly associated to your CRCP account.

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Request Letter Access

- Used to request PPN, Demand, or Defense information that is not available on the CRCP for your account
- Once the request is validated, information from the requested letter and related letters will be made available on the CRCP
- Note: If you add letter information to the incorrect account, your Account Manager will need to contact an EDI Representative for assistance

Slide notes

The CRCP associates information related to letters you have received from the Commercial Repayment Center (CRC) to your Account ID as part of the initial Personal Identification Number (PIN) Request and Account Setup process.

If you cannot find information for a Primary Payment Notice (PPN), 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: If you mistakenly associate letter information to the incorrect account, your Account Manager will need to contact an Electronic Data Interchange (EDI) Representative to disassociate the information.

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Request Letter Access

- Ensure you are in the correct account by viewing the Account ID at the top of *PPN Listing and Demand Listing* pages
 - Return to *Account Listing* page, as needed, to verify company name and/or TIN information

Slide notes

Before requesting letter access, first ensure that you are in the correct CRCP account (i.e. if you are associated to more than one account).

The Account ID is listed at the top of both the PPN Listing and Demand Listing page.

From either page, click Previous to return to the Account Listing page where you can verify the company name and or Tax Identification Number (TIN) information.

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PPN Listing [Quick Help](#)

All Primary Payment Notice (PPN) Letters issued to companies associated with Account ID: 111111 where the PPN Status is Open, Work-In-Progress, or File Pending Submission are displayed on this page. To return to the Account Detail page, click [Previous](#).

To Search for a PPN Letter ID, enter your criteria and then click **Search**.

PPN Letter ID: [Search Hint](#)

PPN Status:

PPN Response Due Date From: / / (MM/DD/YYYY)

PPN Response Due Date To: / / (MM/DD/YYYY) [PPN Response Due Date From or To Search Hint](#)

PPNs **Results Returned : 6**

Submit coverage updates for a PPN Worksheet by selecting either the "File Upload" or "Data Entry" link. For more information on these submission methods, click [here](#).

Please Note: Once you have submitted a response to a PPN Letter ID, you will not be able to make any further updates to coverage information.

Viewed	PPN Letter ID	Submission Method Option 1	Submission Method Option 2	Letter Date	PPN Response Due Date	PPN Status	Submission Information	Submitted By	Submitted Date
Yes	PPN1234572	File Upload	Data Entry	05/04/2014	01/10/2014	Expired			
Yes	PPN1234570	File Upload	Data Entry	04/04/2014	05/10/2014	Submitted File	ppnfo...letterid_989.PDF	AM111AM	02/02/2014
Yes	PPN1234571	File Upload	Data Entry	05/04/2014	06/10/2014	Submitted Data Entry	View Response		
No	PPN1234567	File Upload	Data Entry	01/10/2014	02/10/2015	File Pending Submission			
No	PPN1234568	File Upload	Data Entry	02/04/2014	03/10/2015	Open			
	PPN1234569	File Upload	Data Entry	03/04/2014	04/10/2015	Primary Payment Notice (PPN)			

Slide notes

If you are on the PPN Listing page and have confirmed that you are in the correct account, but still cannot find information for a PPN, remember that the CRCP will only list PPNs that were issued within the past 6 months.

Contact the Commercial Repayment Center (CRC) at 1-855-798-2627 for information on older PPNs.

Note: A Viewed column has been added to the Demand Listing, Defense History, Case Information, and PPN Listing pages. The Viewed column helps you identify when new Demands or PPNs have been added to the account.

A Demand Listing button has been added to the Case Information, Submitted Defense Documents, and PPN Listing pages for simpler navigation back to the Demand Listing page.

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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	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

If you are on the Demand Listing page and have confirmed that you are in the correct account, but still cannot find information for a demand,

remember that by default, this page lists all unresolved/open demands that were issued in the past 3 months. However, you may use search for older demands.

Use the search function to confirm that the demand you are looking for has not yet been associated to your account.

Note: If the status for the demand letter is closed, you will not be able to view case specific information for the demand.

The Request Letter Access process will not make this information available to you. Contact the CRC at 1-855-798-2627 for additional information regarding a demand that has been closed.

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CMS Commercial Repayment Center Portal **COB&R**
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Submitted Defense Documents [Quick Help](#)

All defense documents that have been submitted through the CRCP for Demand Letter ID: [REDACTED] are listed on this page. You may search for a defense document and/or view a list of beneficiaries who were associated to a defense document.

To search for a defense document(s), enter your criteria and then click Search.

Filename: [Filename Search Hint](#)

Submitted By: [Submitted By Search Hint](#)

Submitted Date From: / / (MM/DD/YYYY)

Submitted Date To: / / (MM/DD/YYYY) [From and To Date Search Hint](#)

Defense Documents Results Returned: 1

To view/hide the list of beneficiaries who were included in a submitted defense document, click the View/Hide link under the Associated Beneficiaries column. Once the list of Case IDs associated with the file appears, you may click the Case ID link to see the status of submitted defenses.

Filename	Submitted Date	Submitted By	Associated Beneficiaries
DEFENSE_DOCUMENT.PDF	08/08/2014	[REDACTED]	View/Hide

Slide notes

If you are on the Submitted Defense Documents page and cannot find information for a defense you submitted, remember that the Submitted Defense Documents page only lists defense documents that have been submitted through 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 menu 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 for the Account ID, a redacted Company Name, and a 'View TINs Listing' link. At the bottom of the page, there are links for 'Privacy Policy' and 'User Agreement'.

Account ID	Company Name	Associated TINs
[Redacted]	[Redacted]	View TINs Listing

Slide notes

After you have confirmed that the letter you need to view has not yet been associated to the desired account, begin the request letter access process, by first logging into the CRCP at the following link:

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

The Account Listing page lists the accounts associated to your Login ID. Select the Account ID link for the account you want to associate the letter data to.

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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' link. It displays the selected Account ID and provides instructions on how to access information associated with that ID. Below this, there are three 'Available Actions' boxes: 'Demand Listing' (to view demands/case information or submit defense documentation), 'PPN Listing' (to view a Primary Payment Notice or submit a PPN response), and 'Request Letter Access' (to request access to information related to a letter not yet associated with the Account ID). A 'Previous' button is located at the bottom left of the main content area. At the bottom of the page, there are links for 'Privacy Policy' and 'User Agreement'.

Slide notes

The Account Detail page will display. Click the Request Letter Access link.

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Request Letter Access ? Quick Help

You may submit a request to associate data related to a Primary Payment Notice (PPN), 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 PPN Listing, 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 from the letter you want to access: Entry Hint

*Letter ID:	<input type="text"/>
*Re-enter Letter ID:	<input type="text"/>
*Tax Identification Number	<input type="text"/>

* 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

<input type="radio"/> Defense Letter - Enter the Case ID:	<input type="text"/>
<input type="radio"/> Demand Letter - Enter the Total Debt Due printed on the letter:	\$ <input type="text"/> . <input type="text"/>
<input type="radio"/> Primary Payment Notice (PPN) - Enter the PPN Response Due Date :	<input type="text"/> / <input type="text"/> / <input type="text"/> (MM/DD/CCYY)

Slide notes

The CRCP will display the Request Letter Access page. You will use this page to submit your request. All fields designated with an asterisk are required.

Enter and re-enter the Letter ID for the letter that is not currently available on your account. The Letter ID is a number that begins with '86'.

This number can be found in the upper left corner of the Defense, Demand or PPN letter in the "Regarding" section.

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

Note: The Request Letter Access page has now been updated to include the Tax Identification Number (TIN) as an additional matching criterion.

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CMS Commercial Repayment Center Portal **COB&R**
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Request Letter Access [Quick Help](#)

You may submit a request to associate data related to a Primary Payment Notice (PPN), 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 PPN Listing, 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 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: \$.

Primary Payment Notice (PPN) - Enter the PPN Response Due Date : / / (MM/DD/CCYY)

Cancel **Continue**

Slide notes

Next, select the type of letter (Defense, Demand or PPN) you want to access. 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' followed by a dash, include these characters when you key in 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.

If you are using a PPN, enter the PPN Response Due Date.

You must enter a two-digit month, a two-digit day and a four-digit year.

After all required information has been entered, click Continue.

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

Once clicked, entered information will NOT be saved, the Request Letter Access process will be halted, and you will be returned to the Account Detail page.

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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 for accuracy. If errors are found, the system will display applicable error messages on the screen indicating what error condition(s) 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.

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Request Letter Access Verification [Quick Help](#)

The Employer and Insurer information displayed on this page is associated to the Letter ID you requested on the previous page. Please confirm that this information matches your account information and that you wish to continue requesting access to this letter and, in turn, all cases linked to this letter. Click **Continue** to proceed.

If this information does not match your account, and you do not wish to associate the Letter ID to your account, please click **Cancel** and **contact the CRC at (855) 798-2627 to report that you have received the letter in error.**

Letter ID:	#####
Tax Identification Number (TIN):	#####
Employer Associated to Letter ID:	#####
Insurer Associated to Letter ID:	#####
Account ID:	### ACCOUNT NAML
Account Type:	Employer - Applies to Employers and Other Plan Sponsors

Slide notes

If no errors are found on the Request Letter Access page, the Request Letter Access Verification page will display. You must click Continue to confirm that you want to associate information from the displayed Letter ID, as well as information from all related letters, to the Account ID noted.

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No Match

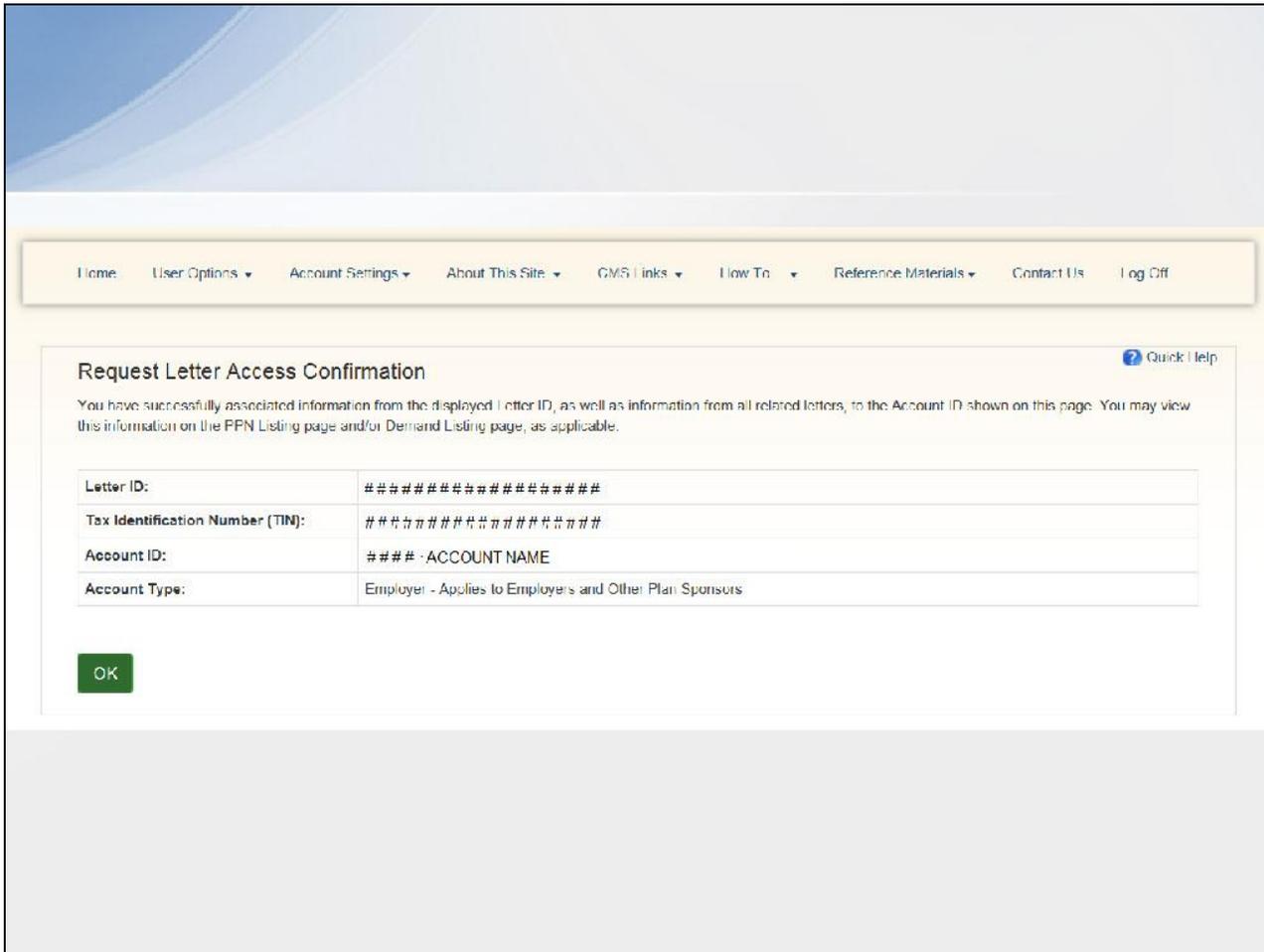
- If the Letter ID and/or key data element cannot be matched in the CRCP
 - CRCP will display message to contact the CRC
 - CRC Phone: 1-855-798-2627

Slide notes

If the Letter ID and/or key data element entered on the Request Letter Access page cannot be matched to a letter in the CRCP,

the CRCP will display a message to contact the CRC. Contact the CRC at 1-855-798-2627 for assistance.

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Slide notes

If the Letter ID and/or key data element entered on the Request Letter Access page are matched to a letter on the CRCP, the Request Letter Access Confirmation page will display.

You have successfully associated information from the displayed Letter ID, as well as information from all related letters, to the Account ID selected.

You may view this information on the PPN Listing page and/or Demand Listing page, as applicable.

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You have completed the CRCP Request Letter Access 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 Request Letter Access 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/>.

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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

If you have any questions or feedback on this material, please go to the following URL:
<https://www.surveymonkey.com/S/CRCPT raining>.