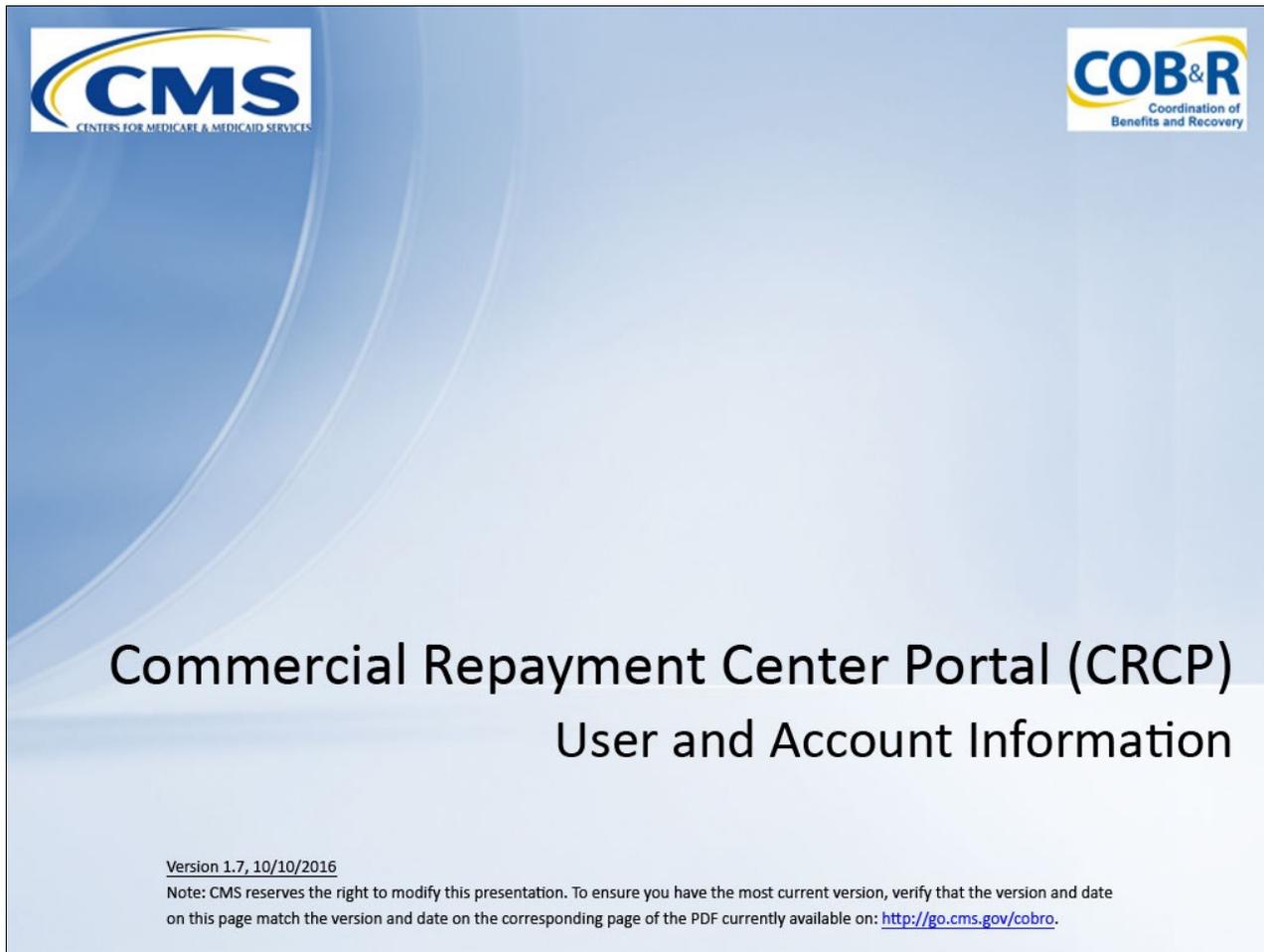


Slide 1 - of 25



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. At the bottom left, there is a version number and a note about the presentation's currency, with a URL provided.

CMS
CENTERS FOR MEDICARE & MEDICAID SERVICES

COB&R
Coordination of
Benefits and Recovery

Commercial Repayment Center Portal (CRCP) User and Account Information

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) User and Account 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.

Slide 2 - of 25

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

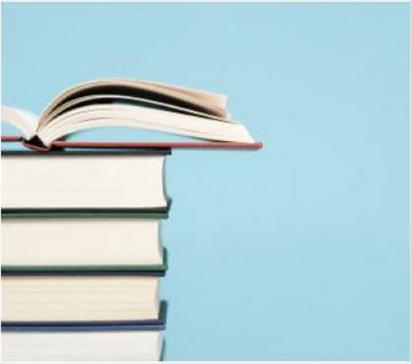
While all information in this document is believed to be correct at the time of writing, this Computer Based Training (CBT) is for educational purposes only and does not constitute official Centers for Medicare & Medicaid Services (CMS) instructions.

All affected entities are responsible for following the instructions in the CRCP User Guide found under the Reference Materials menu at the following link: <https://www.cob.cms.hhs.gov/CRCP/>.

Slide 3 - of 25

Course Overview

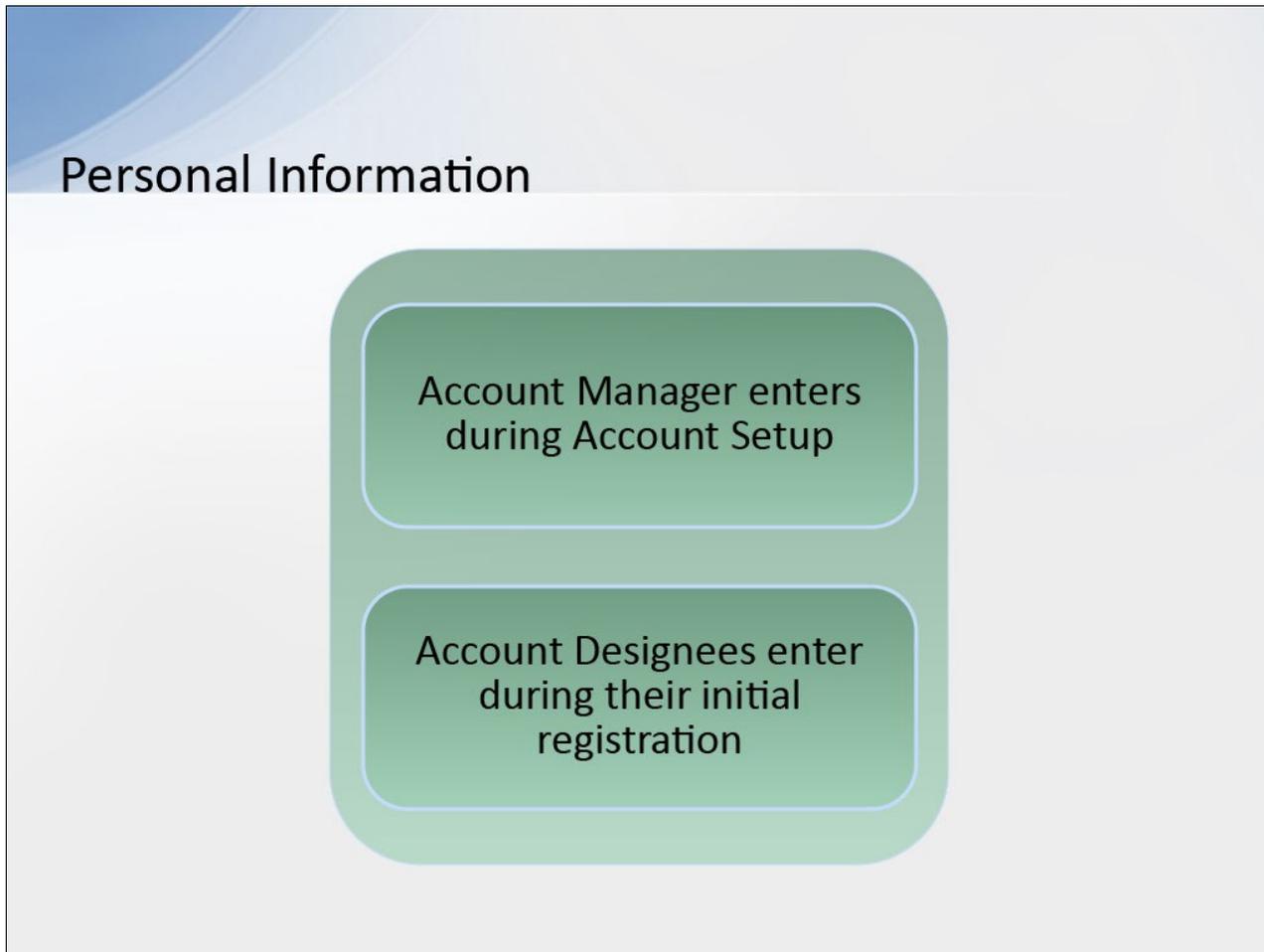
- How an Account Manager or Account Designee
 - Updates personal information
 - Changes Password
 - Retrieves a forgotten Login ID or forgotten Password
 - Views account activity and associated TINs
- How Account Manager
 - Updates Authorized Representative information

**Slide notes**

This course explains how an Account Manager or Account Designee can update their personal information, change their Password, retrieve a forgotten Login ID/Password and view account activity and associated Tax Identification Numbers (TINs).

It also explains how an Account Manager can update Authorized Representative information.

Slide 4 - of 25

**Slide notes**

The Account Manager enters their personal information (i.e., name, mailing address, phone and e-mail address) during Account Setup. Account Designees enter their personal information during their initial registration process.

Slide 5 - of 25

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

Update Personal Information
Change Password

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.

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

Privacy Policy | User Agreement

Slide notes

To update personal 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 Update Personal Information from the User Options drop-down menu.

Slide 6 - of 25

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

Update Personal Information [Quick Help](#)

The information currently associated with your Login ID is displayed on this page. You may update any of this information. Click **Continue** to submit your changes or click **Cancel** to transfer to the Account Listing page without submitting your changes.

An asterisk (*) indicates a required field.

Personal Information			
* First Name:	FIRST	MI:	LAST
*E-mail Address:	address@email.com		
*Re-enter E-mail Address:	address@email.com		
*Phone:			Ext: 222

Mailing Address	
The address listed here is your Personal Mailing Address. It will not be used to send correspondence related to the recovery case.	
*Address Line 1:	999 STREET NAME
Address Line 2:	
*City:	CITY
*State:	Tennessee
*Zip Code:	21117

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

Slide notes

The Update Personal Information page displays. All information currently associated to your Login ID is shown. Make any necessary changes. You will need to re-type your e-mail address in Re-enter Email Address field. Click Continue to submit the updated information.

Slide 7 - of 25



Commercial Repayment Center Portal



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

[Home](#) | [User Options](#) | [About This Site](#) | [CMS Links](#) | [How To...](#) | [Reference Materials](#) | [Contact Us](#) | [Log Off](#)

Personal Information Update Confirmation ? Quick Help

Information associated with your Login ID has been updated. You may print this page for your records. If you need to make additional changes, please access the Update Personal Information link found from the User Options drop-down menu.

Personal Information	
First Name:	FIRST
MI:	
Last Name:	LAST
E-mail Address:	address@email.com
Phone:	[REDACTED] Ext: 222

Mailing Address	
Address Line 1:	999 STREET NAME
Address Line 2:	
City:	CITY
State:	TN
Zip:	21117

Slide notes

The Personal Information Update Confirmation page displays. This page confirms that the information associated with your Login ID has been updated.

If your Login ID is associated to any other Coordination of Benefits Secure Web Site (COBSW) such as the Section 111 COBSW, Workers' Compensation Medicare Set-Aside Portal (WCMSAP), or the Medicare Secondary Payer Recovery Portal (MSPRP), your updated information will be reflected in those applications as well.

Click OK to return to the Account Listing page.

Slide 8 - of 25

E-mail Confirmation

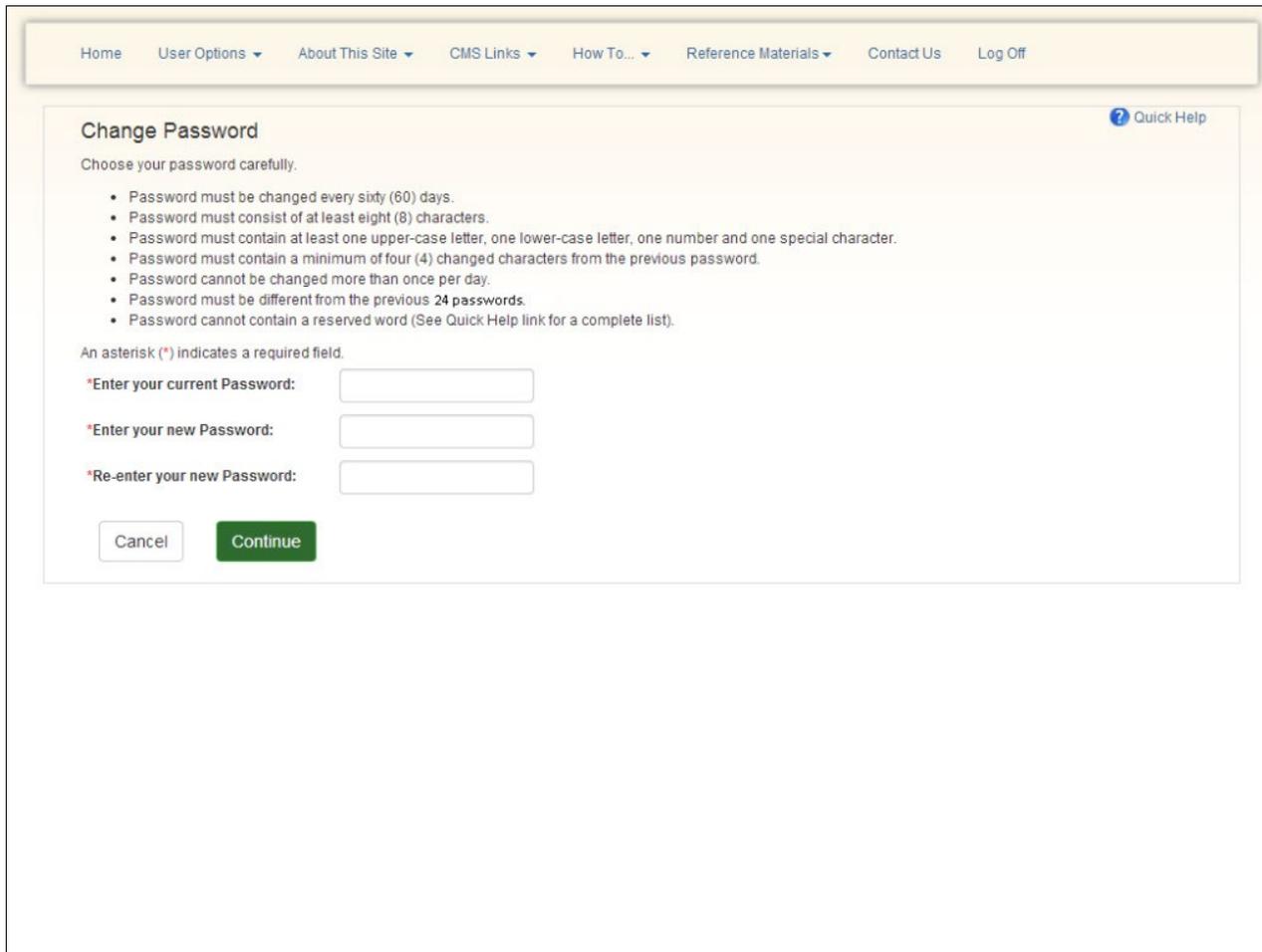
- CRCP sends e-mail confirming that personal information was updated
- Contact an EDI Representative if you did not initiate the update
 - EDI Representative phone: (646) 458-6740
- Confirmation will be sent to old e-mail address if e-mail address was changed

Slide notes

The CRCP sends you an e-mail message confirming that your personal information was updated. If you did not initiate the update, contact an Electronic Data Interchange (EDI) Representative by phone at: (646) 458-6740.

Note: If you modified your e-mail address, the CRCP will send the notification e-mail to your old e-mail address.

Slide 10 - of 25



The screenshot shows a web interface for changing a password. At the top, there is a navigation bar with links: Home, User Options, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Log Off. Below this is a 'Change Password' section with a 'Quick Help' link. The instructions state: 'Choose your password carefully.' and list several requirements: password must be changed every 60 days, at least 8 characters, include upper-case, lower-case, number, and special character, at least 4 changed characters from the previous password, cannot be changed more than once per day, must be different from the previous 24 passwords, and cannot contain reserved words. Below the instructions, there are three input fields: '*Enter your current Password:', '*Enter your new Password:', and '*Re-enter your new Password:'. At the bottom of the form are 'Cancel' and 'Continue' buttons.

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

Change Password [Quick Help](#)

Choose your password carefully.

- Password must be changed every sixty (60) days.
- Password must consist of at least eight (8) characters.
- Password must contain at least one upper-case letter, one lower-case letter, one number and one special character.
- Password must contain a minimum of four (4) changed characters from the previous password.
- Password cannot be changed more than once per day.
- Password must be different from the previous 24 passwords.
- Password cannot contain a reserved word (See Quick Help link for a complete list).

An asterisk (*) indicates a required field.

*Enter your current Password:

*Enter your new Password:

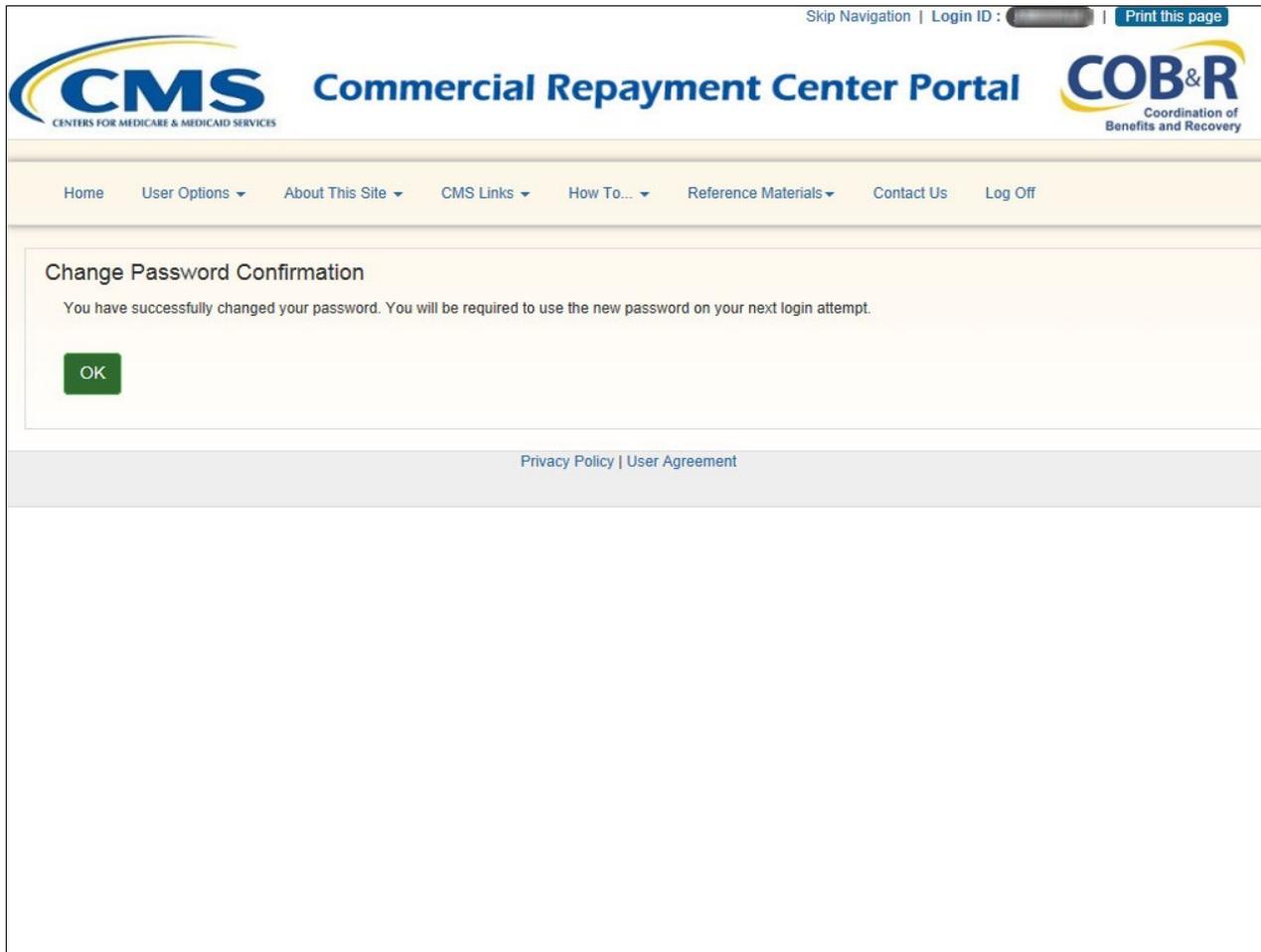
*Re-enter your new Password:

Slide notes

The Change Password page displays. You are required to enter your current Password once and new Password twice. Your new Password must conform to the guidelines listed on this slide. Once you have entered the required information, click Continue.

Note: This page now requires users to change or keep their pre-filled security questions when using a temporary password.

Slide 11 - of 25



The screenshot displays 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). The main title is 'Commercial Repayment Center Portal'. A navigation bar includes links for Home, User Options, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Log Off. The central message is 'Change Password Confirmation', stating: 'You have successfully changed your password. You will be required to use the new password on your next login attempt.' Below this message is a green 'OK' button. At the bottom of the page, there are links for 'Privacy Policy' and 'User Agreement'.

Slide notes

The Change Password Confirmation page displays indicating that the Password has been changed. You will be required to use your new Password the next time you login.

Remember, when you change your Password in the CRCP, the Password will be changed in all applications that you currently have access to (e.g., the Section 111 COBSW, WCMSAP, and the MSPRP).

You will need to use your new Password when logging into to any of these applications. Click OK to return to the Account Listing page.

Slide 12 - of 25

Skip Navigation | [Print this page](#)

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

[About This Site](#) [CMS Links](#) [How To...](#) [Reference Materials](#) [Contact Us](#)

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 Primary Payment Notice (PPN) responses and defense documentation electronically.

CRCP Messages

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)

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

Sign in to your account:

Login ID:

[Forgot Login ID](#)

Password:

[Forgot Password](#)

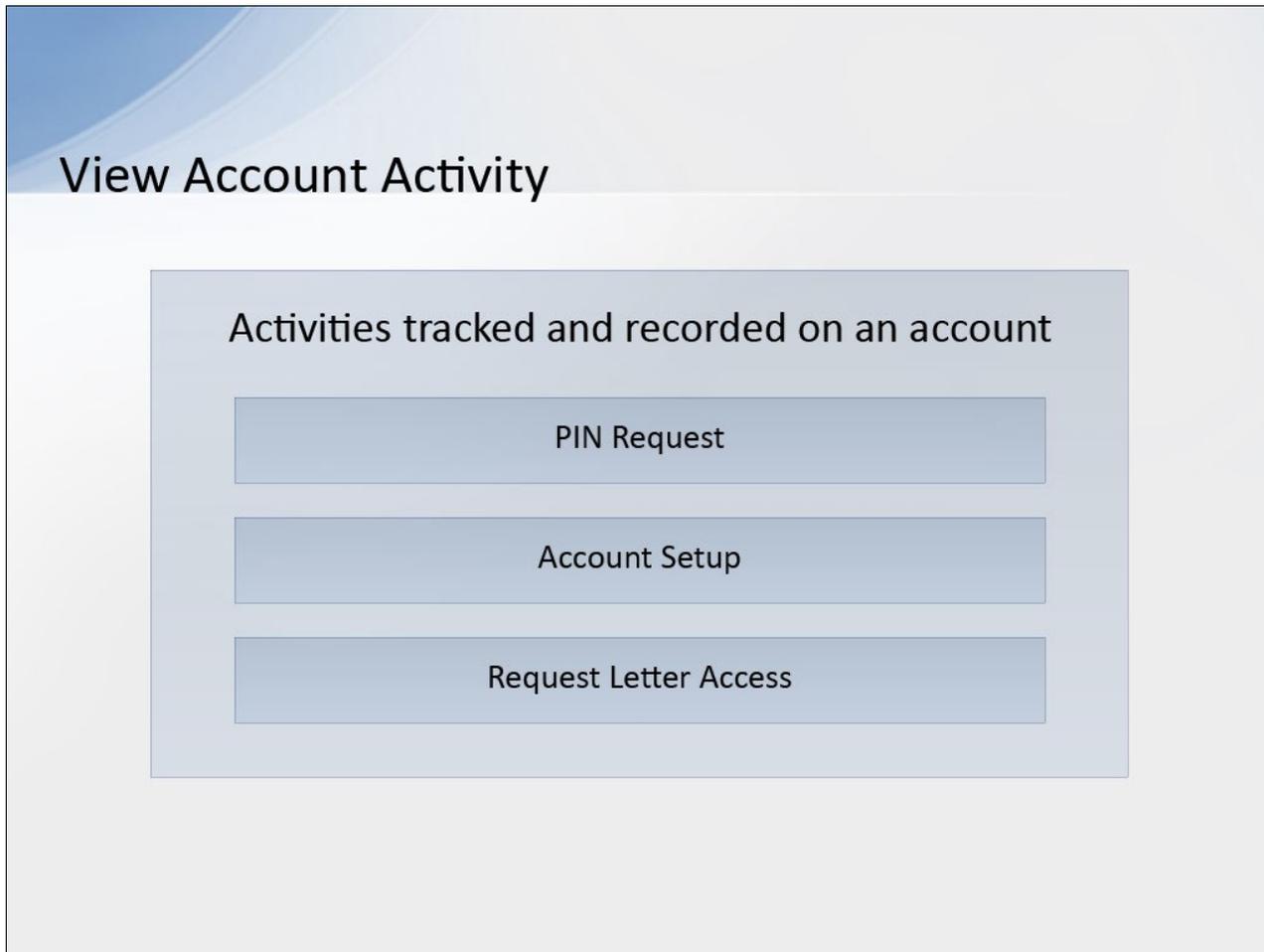
Slide notes

If you have forgotten your Login ID or Password, select the [Forgot Login ID](#) or [Forgot Password](#) link on the Welcome to the CRCP page.

You will be asked to provide your e-mail address or Login ID (as applicable) and answer the security questions you selected during registration to reactivate your account. If you successfully complete these questions, you will receive an e-mail with your Login ID or temporary Password, as applicable.

If you are unable to answer these questions or you do not receive an e-mail within 24 hours, contact an EDI Representative for assistance. EDI Representatives are available at: (646) 458-6740.

Slide 13 - of 25

The slide features a light blue header with the title "View Account Activity". Below the header is a large light blue rectangular box containing the text "Activities tracked and recorded on an account". Underneath this text are three stacked, light blue rectangular buttons with rounded corners, each containing one of the activity names: "PIN Request", "Account Setup", and "Request Letter Access".

View Account Activity

Activities tracked and recorded on an account

- PIN Request
- Account Setup
- Request Letter Access

Slide notes

The Account Manager and Account Designee may view a history of specific activities that were performed on an account. The activities that are tracked and recorded on the CRCP are: PIN Request, Account Setup, and Request Letter Access.

Slide 15 - of 25

The screenshot displays the Commercial Repayment Center Portal interface. At the top, there are logos for CMS (Centers for Medicare & Medicaid Services) and COB&R (Coordination of Benefits and Recovery). A navigation bar 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. A dropdown menu is open over the "Account Settings" link, listing options: "View or Update Authorized Representative (AR) Information", "Designee Maintenance", "View Account Activity", and "View Associated TINS". Below the menu, there is a "Previous" button and a "Privacy Policy | User Agreement" link at the bottom.

Slide notes

When the Account Detail page displays, select View Account Activity from the Account Settings drop-down menu.

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Commercial Repayment Center Portal



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

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

Account Activity

? Quick Help

The Commercial Repayment Center Portal (CRCP) maintains a record of certain activities related to your account. The activities listed on this page have been logged for Account ID: XXXXXXXXXX. Please review this information and report any discrepancies to an EDI Representative at (646)458-6740.

Activity Date	Activity Description	Letter ID	Login ID
08/07/2014	Request Letter Access	XXXXXXXXXX	XXXXXXXXXX
08/07/2014	Request Letter Access	XXXXXXXXXX	XXXXXXXXXX
08/07/2014	Request Letter Access	XXXXXXXXXX	XXXXXXXXXX
08/06/2014	Request Letter Access	XXXXXXXXXX	XXXXXXXXXX
08/06/2014	Request Letter Access	XXXXXXXXXX	XXXXXXXXXX
08/06/2014	Request Letter Access	XXXXXXXXXX	XXXXXXXXXX
07/16/2014	Request Letter Access	XXXXXXXXXX	XXXXXXXXXX
07/15/2014	Request Letter Access	XXXXXXXXXX	XXXXXXXXXX
07/15/2014	Request Letter Access	XXXXXXXXXX	XXXXXXXXXX
07/15/2014	Request Letter Access	XXXXXXXXXX	XXXXXXXXXX
07/14/2014	Account Setup		XXXXXXXXXX
07/14/2014	PIN Request		

Continue

Slide notes

The Account Activity page displays. This page shows the date and description of the activity; the Letter ID on which the activity occurred; and the Login ID of the CRCP user who performed the activity. Note: The Letter ID field is blank for the following activities: PIN Request and Account Setup.

Please report any discrepancies to an EDI Representative. EDI Representatives are available at: (646) 458-6740.

After you have reviewed the account activity, click Continue to return to the Account Detail page.

Slide 17 - of 25

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 bar includes links for Home, User Options, Account Settings, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Log Off. A 'Skip Navigation | Login ID: [redacted] | Print this page' bar is also present. The main content area is titled 'Account Detail' and includes a 'Quick Help' icon. A dropdown menu is open over the 'Account Settings' link, showing options: 'View or Update Authorized Representative (AR) Information', 'Designee Maintenance', 'View Account Activity', and 'View Associated TINs'. Below the dropdown, there is text explaining account information and a 'Previous' button. Under the heading 'Available Actions', there are three boxes with links: 'Demand Listing' (for viewing demands/case information), 'PPN Listing' (for viewing Primary Payment Notices), and 'Request Letter Access' (for requesting access to letters). A note at the bottom explains how to remove access related to a letter. At the very bottom, there are links for 'Privacy Policy | User Agreement'.

Slide notes

From the Account Detail page, you can also view the TINs that are associated to your account. Select View Associated TINs from the Account Settings drop-down menu.

Slide 18 - of 25

The screenshot displays the 'TINs Associated to Account ID' page. At the top, there are logos for CMS (Centers for Medicare & Medicaid Services) and COB&R (Coordination of Benefits and Recovery). A navigation bar includes links for Home, User Options, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Log Off. The main content area shows the title 'TINs Associated to Account ID' with a 'Quick Help' icon. Below the title, it states: 'The Tax Identification Numbers (TINs) listed on this page are associated to Account ID : [REDACTED]'. A table titled 'Associated TINs' contains two rows of redacted information. A 'Previous' button is located at the bottom left of the table area. At the bottom of the page, there are links for 'Privacy Policy | User Agreement'.

Slide notes

The TINS Associated to Account ID page displays. This page lists all of the 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 be associated to your account when a CRCP user completes the Request Letter Access process. Use the View Activity function, as described above, for details on any requests for letter access that were made for the account. Please report any discrepancies to an EDI Representative.

EDI Representatives are available at: (646) 458-6740. After you have reviewed the TINs, click Previous to return to the Account Listing page.

Slide 19 - of 25

Update Authorized Representative Information

Authorized Representative

- Assigned during PIN Request
- Legal authority to bind company to contract
- Can be replaced by Account Manager after PIN Request is complete, if needed

Slide notes

The Authorized Representative is identified and assigned to an account during the PIN Request (i.e., the first step of registering and setting up a new CRCP account). This individual has the legal authority to bind the company to the contract and the terms of CRCP requirements and processing.

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 20 - of 25

The screenshot displays 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 bar includes links for Home, User Options, Account Settings, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Log Off. A 'Skip Navigation' link and a 'Login ID' field are also present. The main content area is titled 'Account Detail' and includes a 'Quick Help' icon. A dropdown menu is open over the 'Account Settings' link, showing options: 'View or Update Authorized Representative (AR) Information', 'Designee Maintenance', 'View Account Activity', and 'View Associated TINS'. Below this, there is a 'Previous' button. The 'Available Actions' section contains three boxes: 'Demand Listing' (for viewing demands/case information), 'PPN Listing' (for viewing Primary Payment Notices), and 'Request Letter Access' (for requesting access to information related to a letter). A footer contains links for 'Privacy Policy' and 'User Agreement'.

Slide notes

To view or update the Authorized Representative’s information, the Account Manager selects View or Update Authorized Representative (AR) Information from the Account Settings drop-down menu on the Account Detail page.

Slide 21 - of 25

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



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

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

The Authorized Representative listed on this page is associated to Account ID: [REDACTED].

You may edit any information on this page. When you have completed your updates, click **Continue** to submit the changes. To return to the Account Detail page without making any changes, click **Cancel**.

An asterisk (*) indicates a required field.

Authorized Representative Information							
*First Name:	<input type="text" value="MARIELLE"/>	MI:	<input type="text"/>				
*Last Name:	<input type="text" value="[REDACTED]"/>						
*Title:	<input type="text" value="PROJECT MANAGER"/>						
*E-mail Address:	<input type="text" value="E.ALMOND@GAMMAHOSPITALS.COM"/>						
*Re-enter E-mail Address:	<input type="text"/>						
*Phone:	<input type="text" value="888"/>	-	<input type="text" value="335"/>	-	<input type="text" value="8888"/>	- Ext	<input type="text" value="1237"/>
Fax:	<input type="text"/>	-	<input type="text"/>	-	<input type="text"/>		

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

Slide notes

The Update Authorized Representative (AR) Information page displays. The personal information previously entered for the Authorized Representative is shown and is open for editing.

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



Commercial Repayment Center Portal



[Home](#) | [User Options](#) | [About This Site](#) | [CMS Links](#) | [How To...](#) | [Reference Materials](#) | [Contact Us](#) | [Log Off](#)

Quick Help

Update Authorized Representative (AR) Information

The Authorized Representative listed on this page is associated to Account ID: [REDACTED].

You may edit any information on this page. When you have completed your updates, click **Continue** to submit the changes. To return to the Account Detail page without making any changes, click **Cancel**.

An asterisk (*) indicates a required field.

Authorized Representative Information

*First Name:	<input type="text" value="MARISSA"/>	MI:	<input type="text" value="T"/>	*Last Name:	<input type="text" value="[REDACTED]"/>
*Title:	<input type="text" value="CHIEF EXECUTIVE OFFICER"/>				
*E-mail Address:	<input type="text" value="[REDACTED]"/>				
*Re-enter E-mail Address:	<input type="text" value="[REDACTED]"/>				
*Phone:	<input type="text" value="[REDACTED]"/>	-	<input type="text" value="[REDACTED]"/>	-	<input type="text" value="[REDACTED]"/>
Fax:	<input type="text" value="[REDACTED]"/>	-	<input type="text" value="[REDACTED]"/>	-	<input type="text" value="[REDACTED]"/>

Cancel
Continue

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

Slide notes

Revise the information as needed. You will be required to re-enter the Authorized Representative's E-Mail Address. Click Continue when you are done.

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Commercial Repayment Center Portal



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

[Home](#)
[User Options](#) ▾
[About This Site](#) ▾
[CMS Links](#) ▾
[How To...](#) ▾
[Reference Materials](#) ▾
[Contact Us](#)
[Log Off](#)

Update Authorized Representative (AR) Information Confirmation

[? Quick Help](#)

The Authorized Representative information has been updated. Click OK to return to the Account Detail page. You may print this page for your records.

Update Authorized Representative (AR) Information Confirmation					
First Name:	Marissa	MI:	T	Last Name:	Smith
Title:	Chief Executive Officer				
E-mail Address:	mtsmith@company.com				
Phone:	123-456-7890101234				
Fax:	123-456-1234				

OK

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

Slide notes

The Authorized Representative’s personal information is updated and the Update Authorized Representative (AR) Information Confirmation page displays. Click OK to return to the Account Listing page. The CRCP will send an e-mail to the Account Manager to notify them that the information was updated.

Slide 24 - of 25

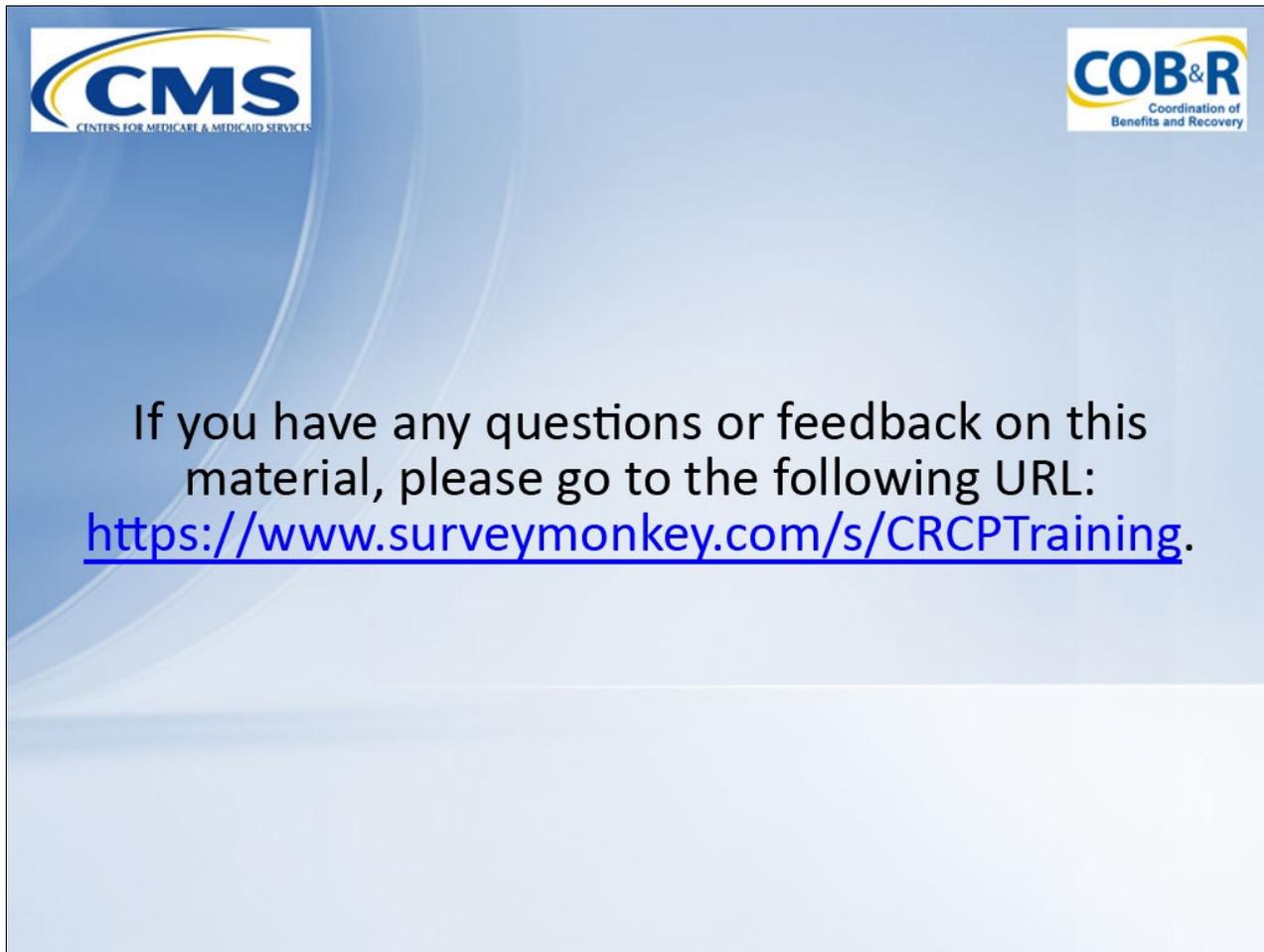


You have completed the CRCP User and Account Information course. Information in this course can be referenced by using the CRCP User Guide found under the *Reference Materials* menu at the following link:
<https://www.cob.cms.hhs.gov/CRCP/>.

Slide notes

You have completed the CRCP User and Account 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:
<https://www.cob.cms.hhs.gov/CRCP/>.

Slide 25 - of 25



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/CRCPTTraining>."

Slide notes

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