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# Medicare Secondary Payer Recovery Portal (MSPRP) Account Designee Access

Version 3.6, 01/03/2017  
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/msprp>.

**Slide notes**

Welcome to the Medicare Secondary Payer Recovery Portal (MSPRP) Account Designee Access course.

As a reminder, you may view the slide number you are on by clicking on 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 found in the MSPRP User Manual found at the following link:

<https://www.cob.cms.hhs.gov/MSPRP/>.

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<https://www.cob.cms.hhs.gov/MSPRP/>.

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## Course Overview

- Account Designee registration
  - Setting up a Login and Password
  - Access privileges once registered

**Slide notes**

This course will describe the basic registration process you will follow to become an Account Designee, (i.e., how you will set up your Login ID and Password for the first time), and the access privileges you will receive once you are registered.

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## Account Designees

Assist Account Manager with the case recovery process

Can perform case recovery tasks (as applicable to the case)

- Submit authorization documentation
- Request conditional payment information
- Request conditional payment letter
- Dispute claims
- Submit case settlement information
- Initiate the demand letter

Cannot perform the following tasks

- Invite other users to be Account Designees
- Update general account information

### Slide notes

Account Designees assist the Account Manager with the case recovery process. They may perform most tasks related to working with recovery cases on the MSPRP.

The Account Designee has the ability to: submit authorization documentation, request conditional payment information, request a conditional payment letter, dispute claims, submit case settlement information and, initiate the demand letter.

Note: Only those actions that are applicable to the case will be available. However, Account Designees may not invite other users to become Account Designees nor can they update general account information.

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**Designee Invitation**

DoNotReply@cob.cms.hhs.gov

Sent: Thu 5/10/2012 3:58 PM

To: AAA.AAA@AAA.AAA

Cc: AAA.AAA@AAA.AAA

---

**\*\*\* PLEASE DO NOT REPLY TO THIS EMAIL \*\*\***

Dear Name:

You have been invited by: First.Last, for Account ID: 99999, to participate in the Medicare Secondary Payer Recovery Portal (MSRP) web portal process. Please follow this link to register: <https://qua.cob.cms.hhs.gov/MSRP/designeeRegistration?token=pZDiwwMBtwwMbw>. If you have already registered, please visit the Medicare Secondary Payer Recovery Portal Welcome Page at <https://qua.cob.cms.hhs.gov/MSRP/> to login.

For any questions or problems please contact the person named in the paragraph above.

This electronic message transmission is intended only for the person or entity to which it is addressed and may contain information that is privileged, confidential or otherwise protected from disclosure. If you have received this transmission, but are not the intended recipient, you are hereby notified that any disclosure, copying, distribution or use of the contents of this information is strictly prohibited. If you have received this e-mail in error, please contact the Electronic Data Interchange (EDI) Department at (646) 458-6740 and delete and destroy the original message and all copies.

## Slide notes

Account Designees are selected and added to an account by the Account Manager.

Once you have been added to an account as a Designee, the MSRP sends you an invitation e-mail which includes instructions on your next steps. A sample e-mail is shown on the slide.

If you already have a Login ID for the Workers' Compensation Medicare Set-Aside Portal (WCMSAP), Section 111 Coordination of Benefits Secure Web site (COBSW), Commercial Repayment Center Portal (CRCP), or MSRP (as an Account Designee or Account Manager for a different account), you will not register for another MSRP Login ID.

You will access the MSRP using your existing Login ID and Password for these systems.

If you do not already have a Login ID for the WCMSAP, Section 111 COBSW, CRCP or MSRP, you must click on the link in the invitation e-mail to register.

This link becomes inactive after 30 days of non-use, so it is important to register as soon as possible after receiving the invitation e-mail.

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## Login Warning [Print this page](#)

**UNAUTHORIZED ACCESS TO THIS COMPUTER SYSTEM IS PROHIBITED BY LAW**

This web site is maintained by the U.S. Government and is protected by federal law. Use of this computer system without authority or in excess of granted authority, such as access through use of another's Login ID and/or password, may be in violation of federal law, including the False Claims Act, the Computer Fraud and Abuse Act and other relevant provisions of federal civil and criminal law. Violators may be subject to administrative disciplinary action and civil and criminal penalties including civil monetary penalties.

For site security purposes, we employ software programs to monitor and identify unauthorized access, unauthorized attempts to upload or change information, or attempts to otherwise cause damage. In the event of authorized law enforcement investigations, and pursuant to any required legal process, information from these sources may be used to help identify an unauthorized individual who has accessed, uploaded, changed, or attempted to access, upload, or change information through this site and may be used for administrative, criminal or other adverse action.

So that the CMS Web site remains accurate and available to you and all other visitors, we monitor network traffic to identify unauthorized attempts to upload or change information or otherwise cause damage to the web service. Use of this system constitutes consent to such monitoring and auditing. Unauthorized attempts to upload information and/or change information on this web site are strictly prohibited and are subject to prosecution under the Computer Fraud and Abuse Act of 1986 and Title 18 U.S.C. Sec.1001 and 1030.

<http://www.cms.hhs.gov/About-CMS/Agency-Information/Aboutwebsite/Security-Protocols.html>

### Privacy Act Statement

The collection of this information is authorized by Section 1862(b) of the Social Security Act (codified at 42 U.S.C 1395y (b)) (see also 42, C.F.R. 411.24). The information collected will be used to identify and recover past conditional and mistaken Medicare primary payments and to prevent Medicare from making mistaken payments in the future for those Medicare Secondary Payer situations that continue to exist. The Privacy Act (5 U.S.C. 552a(b)), as amended, prohibits the disclosure of information maintained by the Centers for Medicare & Medicaid Services (CMS) in a system of records to third parties, unless the beneficiary provides a written request or explicit written consent/authorization for a party to receive such information. Where the beneficiary provides written consent/proof of representation, CMS will permit authorized parties to access requisite information.

**Slide notes**

When you click on the link in the invitation e-mail, the MSPRP Login Warning page will display.

This page provides information about MSPRP security measures including access, penalty and privacy laws.

This page can be printed from the MSPRP by clicking the [Print this page] link on the Web site.

Scroll to the bottom of this page to review the entire statement.

You must agree to the terms of this warning each time you access the MSPRP.

Click the [I Accept] link at the bottom of the page to continue.

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About This Site CMS Links How To... Reference Materials Contact Us

## Designee Registration

The Account Manager listed below has invited you to be a Designee for the following account:

**Submitter Information**

Submitter ID:

**Account Manager Information**

First Name: MI: Last Name:  
Phone: - ext.  
E-Mail:

To set up a Login ID for you to act as a Designee, you will need the pass-phrase created by the Account Manager. If you do not have the pass-phrase, please contact the above Account Manager.

If you have already registered, please visit the Medicare Secondary Payer Recovery Portal Welcome Page at <https://qas.cob.cms.hhs.gov/MSPRP/> to login.

Enter the passphrase:

You must read the User Agreement provided in the scrolling box. To accept the agreement, click the checkbox. You must accept and agree to the terms of the User Agreement in order to continue through the registration process.

[View and print the agreement below](#)

**Quick Help**  
[Help About This Page](#)

## Slide notes

The Designee Registration page will display.

As an Account Designee, you register yourself on the MSPRP.

You will only go through this process once, as you need only one Login ID no matter how many Account IDs you will ultimately work with.

This is the initial page in the registration process where you will create your Login ID and Password for the MSPRP.

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**Designee Registration**

The Account Manager listed below has invited you to be a Designee for the following account:

**Submitter Information**

Submitter ID:

**Account Manager Information**

First Name: MI: Last Name:

Phone: -- ext.

E-Mail:

To set up a Login ID for you to act as a Designee, you will need the pass-phrase created by the Account Manager. If you do not have the pass-phrase, please contact the above Account Manager.

If you have already registered, please visit the Medicare Secondary Payer Recovery Portal Welcome Page at <https://qus.cob.cms.hhs.gov/MSPRP/> to login.

Enter the pass-phrase:

You must read the User Agreement provided in the scrolling box. To accept the agreement, click the checkbox. You must accept and agree to the terms of the User Agreement in order to continue through the registration process.

[View and print the agreement below](#)

**Quick Help**

[Help About This Page](#)

## Slide notes

You are required to enter the Passphrase given to you by the Account Manager for this account.

The Passphrase is a short sequence of case-sensitive letters, numbers, and/or symbols, up to 30 characters long.

You must enter it exactly as the Account Manager gave it to you.

If the Account Manager did not provide you with the Passphrase, contact them at the phone number or e-mail address displayed on this page.

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To set up a Login ID for you to act as a Designee, you will need the pass-phrase created by the Account Manager. If you do not have the pass-phrase, please contact the above Account Manager.

If you have already registered, please visit the Medicare Secondary Payer Recovery Portal Welcome Page at <https://qua.cob.cms.hhs.gov/MSPRP/> to login.

Enter the passphrase:

You must read the User Agreement provided in the scrolling box. To accept the agreement, click the checkbox. You must accept and agree to the terms of the User Agreement in order to continue through the registration process.

[View and print the agreement below](#)

**User Agreement**

THE FOLLOWING DESCRIBES THE TERMS AND CONDITIONS BY WHICH THE CENTERS FOR MEDICARE & MEDICAID SERVICES (CMS) OFFERS YOU ACCESS TO THE MEDICARE SECONDARY PAYER RECOVERY PORTAL (MPSRP) SECURE WEB SITE.

You must read and accept the terms and conditions contained in this User Agreement expressly set out below and incorporated by reference before you may access the MSPRP

Please check the following box:

I accept the User Agreement and Privacy Policy above

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

## Slide notes

You must read and agree to the terms of the User Agreement.

You can read and/or print the User Agreement in a separate window by clicking the [View and print the agreement below] link.

Once you have read the User Agreement, and agree to abide by the terms, click the [User Agreement] checkbox. This checkbox indicates acceptance/non-acceptance of the User Agreement.

You must agree to the terms in the User Agreement in order to proceed with your registration.

Click [Continue] to proceed to the next page in the Designee Registration process.

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The screenshot shows a web form titled "Designee Personal Information" with a green navigation bar at the top containing links: "About This Site", "CMS Links", "How To...", "Reference Materials", and "Contact Us". The form itself has a light yellow background and includes a "Quick Help" box on the right with a "Help About This Page" link. The form fields are as follows:

- \*First Name:
- MI:
- \*Last Name:
- \*E-mail Address:
- \*Phone:  -  -  - ext.
- Mailing Address:
  - \*Address Line 1:
  - Address Line 2:
  - \*City:
  - \*State:  (dropdown menu)
  - \*Zip Code:  -

At the bottom of the form are two green buttons: "Previous" (with a left arrow) and "Continue" (with a right arrow). A blue footer bar at the bottom of the page contains the text "Privacy Policy | User Agreement".

## Slide notes

The Designees Personal Information page displays. All fields denoted by an asterisk (\*) are required.

Enter your name and e-mail address.

Note: This e-mail cannot match that of the Account Manager for this account or the Account Representative for any MSPRP account.

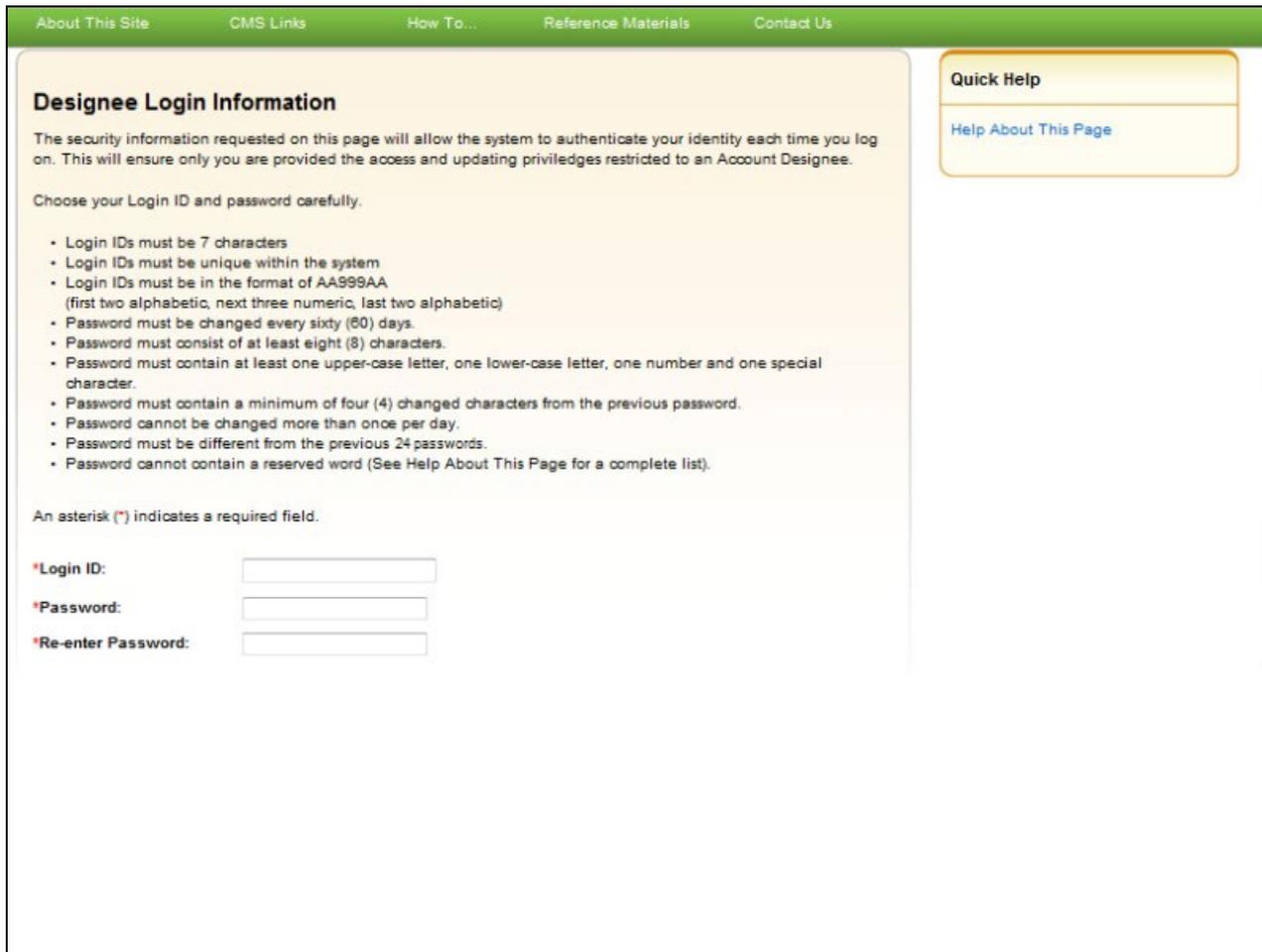
Re-enter your e-mail address for verification purposes. This information cannot be cut and pasted.

Enter your phone number and mailing address.

For the Address Line 1 field, the street number and street name should be placed on one address line field while other information such as suite number, attention to, etc. should be placed in the Address Line 2 field, if applicable.

When the required information has been entered, click [Continue] to proceed.

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

### Designee Login Information

The security information requested on this page will allow the system to authenticate your identity each time you log on. This will ensure only you are provided the access and updating privileges restricted to an Account Designee.

Choose your Login ID and password carefully.

- Login IDs must be 7 characters
- Login IDs must be unique within the system
- Login IDs must be in the format of AA999AA (first two alphabetic, next three numeric, last two alphabetic)
- 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 Help About This Page for a complete list).

An asterisk (\*) indicates a required field.

\*Login ID:

\*Password:

\*Re-enter Password:

**Quick Help**

[Help About This Page](#)

## Slide notes

The Designee Login Information page will display.

This page is used to create a Login ID and Password which will allow the MSPRP to authenticate your identity each time you login to the MSPRP.

You must set up a Login ID and Password that conforms to the CMS standard guidelines shown on this page.

Create and enter a Login ID, and enter and re-enter a Password. You will use this Login ID and Password to access the MSPRP site.

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An asterisk (\*) indicates a required field.

\*Login ID:

\*Password:

\*Re-enter Password:

The Security Questions allow you to regain account access if you forget your password. Please note the answers you provide to these questions should be actual answers and not hints for your password.  
Choose Security Questions and Provide Answers

\*Security Question 1:

\*Answer 1:

\*Security Question 2:

\*Answer 2:

## Slide notes

Choose security questions and answers that can be easily remembered.

This information will allow you to access your Login ID and reset your Password in the event you forget either one.

When you have completed the Designee Login Information page, click [Continue].

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

## Designee Summary

 [Print this page](#)

Please review your personal and login information. If you need to change the information, click the Edit button. If you are satisfied with the information click the Continue button to submit your information. Click Cancel to cancel the setup process; all data will be lost. Please print this page for your records.

**Personal Information** [Edit](#)

First Name: FIRST MI: M Last Name: LAST

E-Mail: AAA@AAA.AAA

Phone: ###-###-#### ext. ##

**Login ID** [Edit](#)

Login ID: AA####

**Mailing Address**

Address Line 1: AAAAAAAAAA

Address Line 2: AAAAAAAAAA

City: AAAAAAAAAA

State: AAAAAAAAAA

Zip Code: ####

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

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

**Quick Help**

[Help About This Page](#)

## Slide notes

The Designee Summary page will display next.

This page displays a summarized view of the information that was entered during the Account Designee registration process.

It also provides you the opportunity to revise your name, phone number, Login ID and/or Password, and address.

Review this information to ensure it is accurate.

If information needs to be corrected, click [Edit] for the corresponding section.

This will direct you to the applicable page to make updates.

Once you have completed making your corrections, click [Continue] on the page you are editing as well as each subsequent page until you return to the Designee Summary page.

Note: To make corrections to your address, click [Edit] for the Personal Information section.

When you have verified the information, click [Continue].

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The screenshot shows a web page with a green navigation bar at the top containing links: 'About This Site', 'CMS Links', 'How To...', 'Reference Materials', and 'Contact Us'. The main content area has a light yellow background and is titled 'Designee Thank You'. Below the title, a paragraph states: 'You have successfully completed registration for the Medicare Secondary Payer Recovery Portal and established yourself as a Designee for the Account ID. Please print this page for your records.' Underneath is a section titled 'Next Steps' with two paragraphs: 'You may now return to the Medicare Secondary Payer Recovery Portal welcome page, login using the Login ID and Password you just created to access accounts associated with your ID.' and 'You can visit the Medicare Secondary Payer Recovery Portal Welcome Page at <https://qua.cob.cms.hhs.gov/MSPRP/> or click the Exit button below.' A green 'Exit' button with a right-pointing arrow is located at the bottom left of the main content area. On the right side, there is a 'Quick Help' box with a 'Help About This Page' link. At the bottom of the page, a blue footer bar contains the text 'Privacy Policy | User Agreement'.

## Slide notes

The Thank You page will display which confirms that you have successfully completed your registration. Click [Exit] to return to the Welcome to the MSPRP Login page.

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The screenshot shows the MSPRP (Medicare Secondary Payer Recovery Portal) login page. At the top, there is a green navigation bar with links: "About This Site", "CMS Links", "How To...", "Reference Materials", and "Contact Us". A "Skip Navigation" link is also present in the top right corner.

The main content area is titled "Welcome to the MSPRP". Below this, there is a paragraph explaining the portal's purpose: "The Medicare Secondary Payer Recovery Portal provides a quick and efficient way to request case information and provide information to assist in resolving Medicare's recovery claim. With the use of this portal, you may submit a valid authorization, request an update to the conditional payment amount, submit settlement information and dispute claims."

Under the heading "Getting Started", there is a paragraph: "If you are a Medicare Beneficiary and would like to use the MSPRP to request case information, please login to your MyMedicare account by visiting the MyMedicare.gov website at <https://mymedicare.gov/>." Another paragraph follows: "For more information, refer to How To Get Started under the How To menu option. To begin the registration process, click the 'New Registration' button."

Below the text, there are two steps for getting started:

- STEP 1**: A button labeled "New Registration".
- STEP 2**: A button labeled "Account Setup" with the subtext "(Account ID and PIN required)".

On the right side of the page, there is a "Sign in to your account" form. It includes fields for "User Name:" and "Password:", each with a "Forgot ID" or "Forgot Password" link below it. At the bottom of the form are "Login" and "Clear" buttons.

At the bottom of the page, there is a blue footer bar with the text "Privacy Policy | User Agreement".

## Slide notes

The Welcome to the MSPRP Login page will display.

You can login to the MSPRP using the Login ID and Password you just created and begin using the MSPRP to access accounts associated with your Login ID.

Enter your Login ID in the User Name field and your Password in the Password field and then click [Login].

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Home
About This Site
CMS Links
How To...
Reference Materials
Contact Us
Logoff

## Account List

 [Print this page](#)

Click the desired link to access the associated account.

You may update your personal information or change your current password by clicking the appropriate link under the Account Settings List.



### Multi-Factor Authentication

MSPRP users may request access to view unmasked claims data that was previously only accessible to the beneficiary. Individuals requesting this access must complete the ID Proofing and Multi-Factor Authentication (MFA) process. The status of your request will display as a link under the Multi-Factor Authentication box. You will click this link to progress through the required steps. Once you have successfully completed this process your status will be changed to Complete.

During the ID Proofing process you will be asked to provide current personal information and respond to questions created by Experian Credit Services (an outside entity) to confirm your identity. This information, the questions, and your answers will not be stored on the MSPRP. This process will not impact your credit score.

To use MFA services, you will be required to download and install one or more MFA Credential ID tokens for the devices you plan to use to access the MSPRP and then you must activate the Credential ID for your Login. To download a software Credential ID, go to the Symantec Validation and Identity Protection (VIP) Service website found at the following link: <https://idprotect.vip.symantec.com>

You will be able to activate a credential after the Next Step link has changed to **Credential Required**. To begin the ID Proofing process, click the Next Step: [Get Started](#) link.

**Associated Account IDs:**

##### FIRST LAST

**Quick Help**

[Help About This Page](#)

**Account Settings**

[Update Personal Information](#)

[Change Password](#)

**Multi-Factor Authentication**

Status: **Initial Process**

Next Step: [Get Started](#)

## Slide notes

The Account List page displays.

You are now logged into the MSPRP system.

The Account List page is the Account Designee's Home page.

This page functions as the main processing page to initiate any MSPRP functions available to you as the Designee.

The Account IDs listed on this page are the accounts you are associated with.

Click the [Account ID] you want to work with.

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The screenshot shows a web application interface. At the top is a green navigation bar with links: Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Logoff. A 'Skip Navigation' link is in the top right corner. The main content area has a light yellow background. On the left, a 'Welcome!' section displays the account ID '99999 AAAA AAAA'. Below this, there are several paragraphs of text explaining the portal's purpose and providing instructions on how to use it. At the bottom of this section are two links: 'Request Case Access' and 'Case Listing'. On the right side, there are two yellow boxes. The top one is titled 'Quick Help' and contains a link 'Help About This Page'. The bottom one is titled 'Account Settings' and contains a link 'View Account Activity'.

## Slide notes

The Welcome! Page will display.

The Account ID you just selected is displayed at the top of the page.

From this page, you can View Account Activity for this Account ID, or access the following functions: Request Case Access and Case Listing.

Request Case Access is used to search for and add (link) a recovery case to your Case Listing page.

Once a case has been successfully linked (added) to the account, both you and your Account Manager will be able to view the case by accessing the Case Listing page.

You must always perform this step to link a case to your MSPRP account for the first time.

Case Listing is used to view all cases that your Account Manager has granted you access to and includes any cases that you previously requested access to using the Request Case Access page.

For more information on these two functions, see the Application Overview CBT.

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You have completed the MSPRP Account Designee Access course. Information in this course can be referenced by using the MSPRP User Manual found at the following link:

<https://www.cob.cms.hhs.gov/MSPRP>.

For general information on Medicare Secondary Payer Recovery, go to this URL: <http://go.cms.gov/cobro>.

**Slide notes**

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For general information on Medicare Secondary Payer Recovery, go to this URL: <http://go.cms.gov/cobro>.

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

Slide notes

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