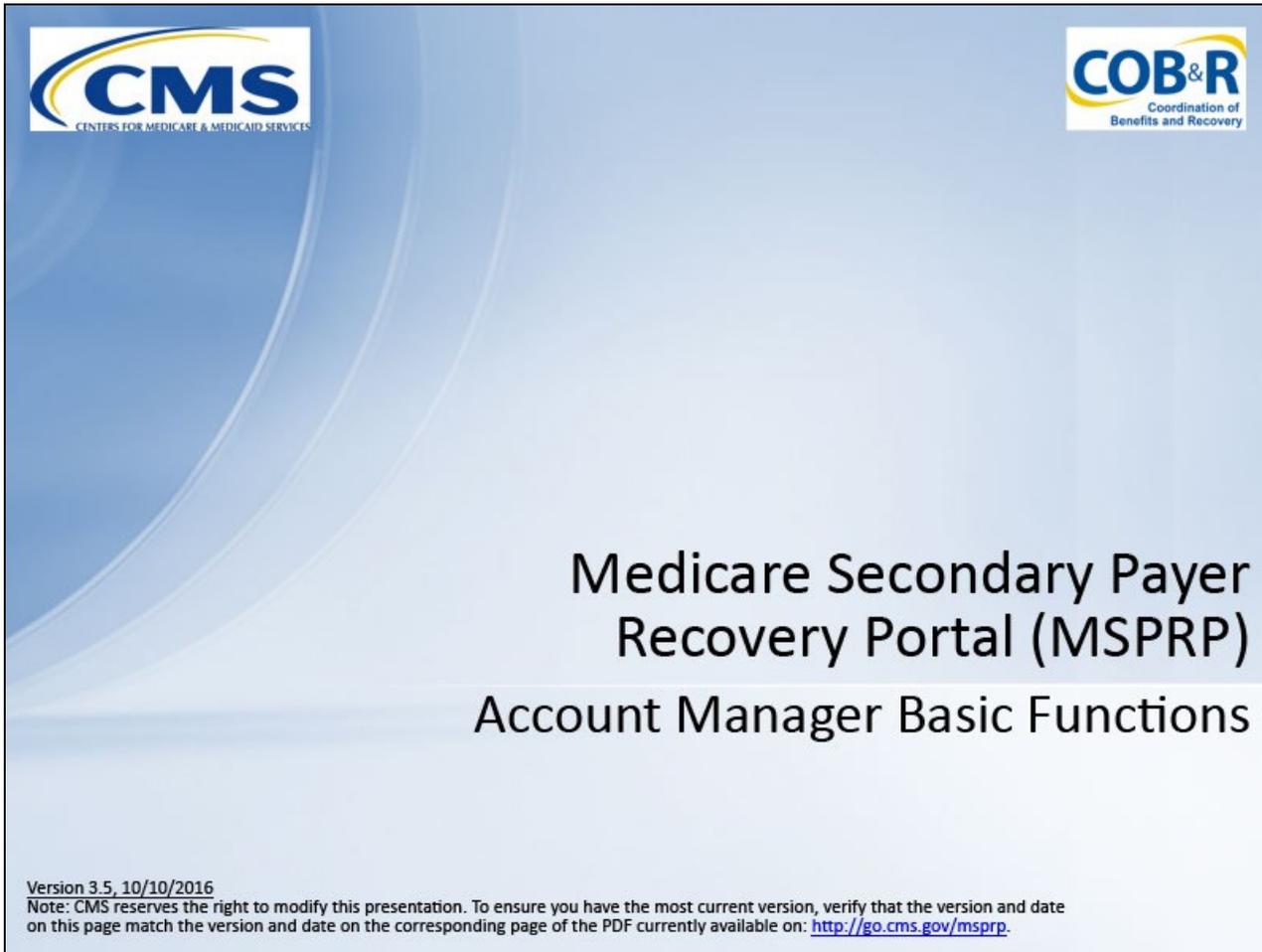


Slide 1 - of 41



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 small text block containing version information and a note about the presentation's content.

CMS
CENTERS FOR MEDICARE & MEDICAID SERVICES

COB&R
Coordination of
Benefits and Recovery

Medicare Secondary Payer Recovery Portal (MSPRP) Account Manager Basic Functions

Version 3.5, 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/msprp>.

Slide notes

Welcome to the Medicare Secondary Payer Recovery Portal (MSPRP) Account Manager Basic Functions course.
Note: This module is intended for those entities who will register for a corporate account.

A corporate account type indicates that the entity has an Employer Identification Number (EIN) and will be regularly submitting MSPRP requests.

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/>.

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 found in the MSPRP User Manual found at the following link: <https://www.cob.cms.hhs.gov/MSPRP/>.

Slide 3 - of 41

Course Overview

- Role of Account Manager
- Basic Functions
 - Manage account
 - Account Designee maintenance



Slide notes

This course will explain the role of the Account Manager and how they will manage the account and perform Account Designee maintenance.

Slide 4 - of 41

Account Manager - Role

- Each MSPRP account must have Account Manager
 - Established during Account Setup
- Account Representative must contact EDI Department to change Account Manager
- Registered user of the system
 - Controls administration of account, manages overall process
 - Can only have one per MSPRP account
 - Can be associated to multiple MSPRP accounts as an Account Manager or an Account Designee
 - May choose to manage the entire account or invite individuals (Account Designees) to assist in the process

Slide notes

Each MSPRP account must have an assigned Account Manager. For Corporate and Representative account types, the Account Manager is assigned during the Account Setup process.

To replace an Account Manager, the Account Representative must contact the Electronic Data Interchange (EDI) Department.

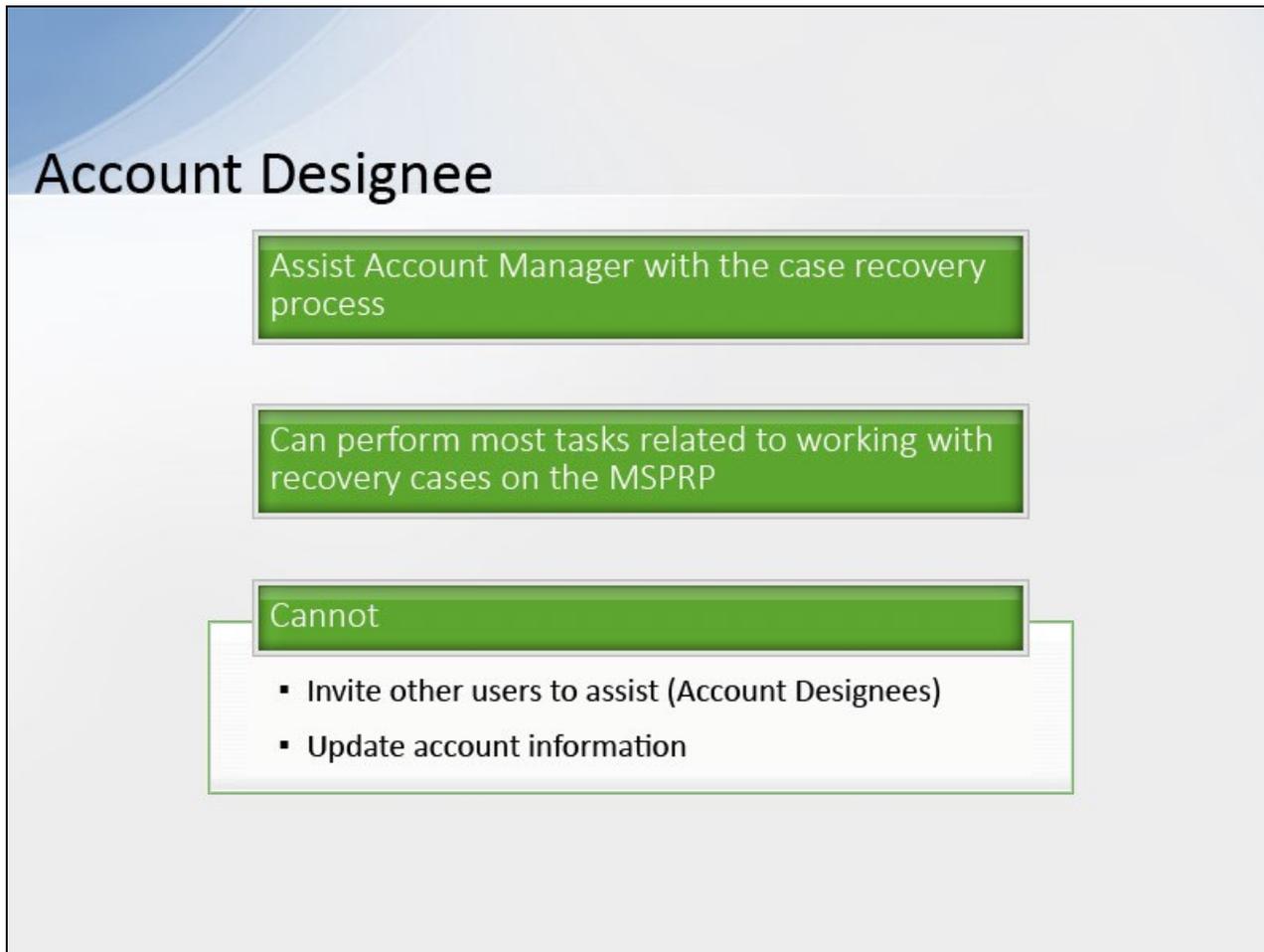
The Account Manager is a registered user of the system. This person controls the administration of an organization's account and manages the overall process.

Each MSPRP account can have only one Account Manager. For representative accounts, the Representative may also be the Account Manager.

The Account Manager can be associated to more than one MSPRP account as an Account Manager or an Account Designee.

The Account Manager may choose to manage the entire account by themselves or may invite other individuals (Account Designees) to assist in this process.

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Account Designee

- Assist Account Manager with the case recovery process
- Can perform most tasks related to working with recovery cases on the MSPRP
- Cannot
 - Invite other users to assist (Account Designees)
 - Update account information

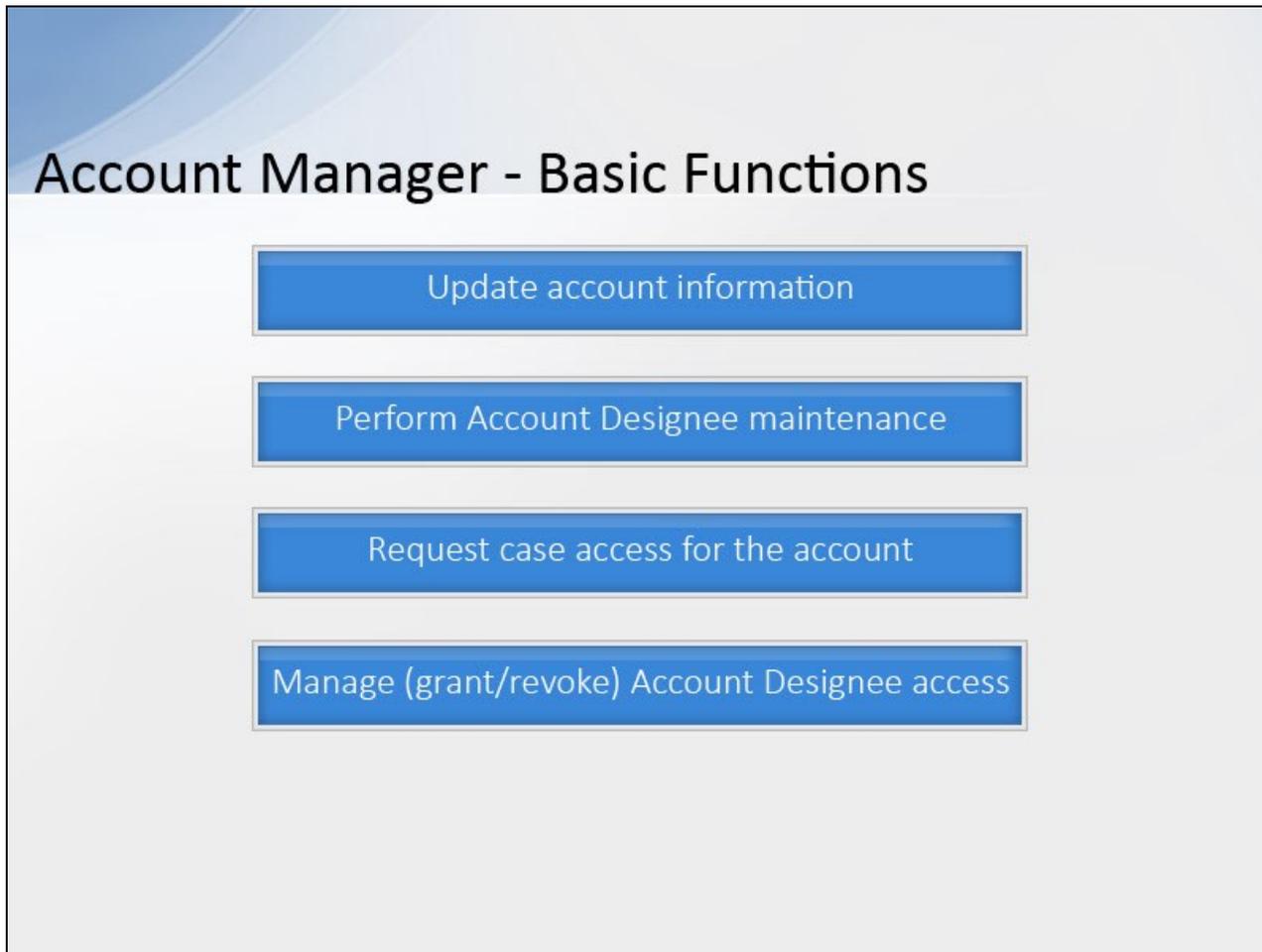
Slide notes

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 requests, request conditional payment amounts, request conditional payment letters, obtain final conditional payment information, submit claim disputes, submit 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 assist as Account Designees and they cannot update general MSPRP account information.

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**Slide notes**

The Account Manager is responsible for updating general MSPRP account information and also performs the following Account Designee Maintenance functions:

add/delete an Account Designee, edit information for an unregistered Account Designee, and regenerate the Account Designee invitation e-mail.

The Account Manager can request case access for the account and also manage (grant/revoke) Account Designee access to a case. Once access has been granted to a case, the Account Designee can perform the following case specific actions:

submit an authorization request, request the conditional payment amount, request a conditional payment letter, submit claim disputes,

request that a case be put into the Final Conditional payment process, submit the notice of settlement, and initiate the demand letter.

Note: Only those actions that are applicable to the case will be available. Additionally, some of these actions can only be performed if the proper authorization has been submitted and verified.

Please see the Requesting Authorization CBT for more information.

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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

To access an MSPRP account, the Account Manager must first successfully login to the MSPRP application. After a successful login, the Account List page will display. Click the desired link to access the associated account.

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The screenshot shows a web page with a green navigation bar at the top containing links: Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Logoff. The main content area is divided into two columns. The left column is titled "Welcome!" and contains the following text: "Account: ##### FIRST LAST", "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.", "You may view the account activity by clicking the appropriate link under the Account Settings.", "To request information regarding a case you have not already associated to your account, click the Request Case Access link below.", "To see cases that you have previously associated to your account, click the Case Listing link below.", "Note: You will not be able to use the links below until your Profile Report has been returned.", and two blue links: "Request Case Access" and "Case Listing". The right column contains two yellow-bordered boxes. The top box is titled "Quick Help" and contains a blue link "Help About This Page". The bottom box is titled "Account Settings" and contains three blue links: "Update Account Information", "Designee Maintenance", and "View Account Activity".

Slide notes

The Welcome! page displays. To revise account information, the Account Manager will click [Update Account Information] in the Account Settings box.

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

Update Corporate Information [Print this page](#)

You may edit the Corporate Account Information or Account Representative information by clicking on the Edit button of that section. You may not change the account type. Click the Continue button to submit the changes. Click the Cancel button to return to the Home Page, all changes will be lost.

Account Type: Corporate

Corporate Information [Edit](#)

Employer Identification Number(EIN): #####
Corporate Name: AAAAAAAAAA

Recovery Case Mailing Address

Address Line 1: AAAAAAAAAA
Address Line 2: AAAAAAAAAA
City: AAAAAAAAAA
State: AAAAAAAAAA
Zip Code: ####

Account Representative (AR) Information [Edit](#)

First Name: AAAA MI: A Last Name: AAAA
Title: AAAA
E-Mail Address: AAAAAAAAAA
Phone: ##### ext: ##
Fax: #####

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

Quick Help

[Help About This Page](#)

Slide notes

The Update Information page will display. The one pictured here, Update Corporate Information page, is what will display for corporate users.

This page lists the Recovery Case Mailing Address and Account Representative contact information. The Update Information screens for Representative account types are very similar and function the same way.

To make any corrections, click the [Edit] button next to the corresponding section.

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The screenshot shows a web form titled "Corporate Information" with a green navigation bar at the top containing links for "About This Site", "CMS Links", "How To...", "Reference Materials", and "Contact Us". A "Skip Navigation" link is also present in the top right. The form includes a "Quick Help" box with a "Help About This Page" link. The main form area contains the following fields:

- Corporate Information**
An asterisk (*) indicates a required field.
- * **Employer Identification Number (EIN):** [Text input field]
- * **Corporation Name:** [Text input field]
- Business Mailing Address:**
- * **Address Line 1:** [Text input field]
- Address Line 2:** [Text input field]
- * **City:** [Text input field]
- * **State:** [-Select-] [Dropdown menu]
- * **Zip Code:** [Text input field] - [Text input field]

At the bottom of the form are three buttons: "Previous" (with a left arrow), "Continue" (with a right arrow), and "Cancel" (with an 'x' icon).

Slide notes

This will direct you to the applicable page to make updates. Once you have completed making your corrections, click [Continue]. You will be returned to the Update Corporate Information page.

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

Update Corporate Information [Print this page](#)

You may edit the Corporate Account information or Account Representative information by clicking on the Edit button of that section. You may not change the account type. Click the Continue button to submit the changes. Click the Cancel button to return to the Home Page, all changes will be lost.

Account Type: Corporate

Corporate Information [Edit](#)

Employer Identification Number(EIN): #####
Corporate Name: AAAAAAAAAA

Recovery Case Mailing Address

Address Line 1: AAAAAAAAAA
Address Line 2: AAAAAAAAAA
City: AAAAAAAAAA
State: AAAAAAAAAA
Zip Code: ####

Account Representative (AR) Information [Edit](#)

First Name: AAAA MI: A Last Name: AAAA
Title: AAAA
E-Mail Address: AAAAAAAAAA
Phone: ##### ext: ##
Fax: #####

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

Quick Help
[Help About This Page](#)

Slide notes

After you have returned to the Update Information page, click [Continue].

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

Corporate Information Update Confirmation

The corporate information has been updated. Click the Continue button to return to the Home Page. Print this page for your records.

Account Type: Corporate

Corporate Information

Employer Identification Number(EIN): #####

Corporate Name: AAAAAAAAAA

Recovery Case Mailing Address

Address Line 1: AAAAAAAAAA

Address Line 2: AAAAAAAAAA

City: AAAAAAAAAA

State: AAAAAAAAAA

Zip Code: ####

Account Representative (AR) Information

First Name: AAAA MI:A Last Name:AAAA

Title: AAAA

E-Mail Address: AAAAAAAAAA

Phone: ##### ext: ##

Fax: #####

Quick Help

[Help About This Page](#)

Slide notes

Next, the system will display the Update Corporate Information Confirmation page, showing the updated information.

You may print this page for your records. Click [Continue] to submit the changes and return to the MSPRP Home page.

Slide 13 - of 41

Update Account Information



- System sends an e-mail to the Account Manager, indicating that the account information has been changed

- When e-mail address has been changed
 - System sends e-mail to old e-mail address
 - E-mail recipient instructed to notify EDI Department if they did not initiate change

Slide notes

With the exception of a modification to an e-mail address, the system will send an e-mail to the Account Manager indicating that the account information has been changed.

The Account Manager will be instructed to notify the EDI Department if they did not initiate the update.

When an e-mail address has been changed, the system will send an e-mail to the old e-mail address stating that an e-mail address change has been requested.

The e-mail recipient will be instructed to notify the EDI Department if they did not initiate the e-mail address change.

Slide 14 - of 41

Account Designee Maintenance

- Add Account Designees
 - Up to 100 Account Designees for corporate account
 - Up to 5 Account Designees for representative account
- Edit information for unregistered Account Designee
- Regenerate invitation e-mail for Account Designee's registration
- Delete Account Designee

Slide notes

The Account Manager may designate one or more Account Designees to assist with case management. The number of Account Designees associated with one MSPRP account is dependent on the account type.

Corporate accounts may have up to 100 Account Designees. Representative accounts may have up to 5. The Account Manager can perform the following Account Designee maintenance functions:

add an Account Designee, edit information for an unregistered Account Designee, regenerate an invitation e-mail with a token link for an Account Designee's registration, and delete an Account Designee.

Note: To change the role of an Account Designee on an existing account to an Account Manager, the Account Representative can contact their EDI representative by phone at 646-458-6740 or by email at: COBVA@GHIMedicare.com for assistance.

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The screenshot shows a web application interface with a green navigation bar at the top containing links: Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Logoff. The main content area is divided into two columns. The left column has a 'Welcome!' heading, followed by an account identifier 'Account: ##### FIRST LAST'. Below this 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.' This is followed by another paragraph: '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.' A third paragraph states: 'You may view the account activity by clicking the appropriate link under the Account Settings.' The next paragraph says: 'To request information regarding a case you have not already associated to your account, click the Request Case Access link below.' The following paragraph says: 'To see cases that you have previously associated to your account, click the Case Listing link below.' A 'Note' follows: 'Note: You will not be able to use the links below until your Profile Report has been returned.' At the bottom of this column are two blue links: 'Request Case Access' and 'Case Listing'. The right column contains two yellow-bordered boxes. The top box is titled 'Quick Help' and contains a blue link 'Help About This Page'. The bottom box is titled 'Account Settings' and contains three blue links: 'Update Account Information', 'Designee Maintenance', and 'View Account Activity'.

Slide notes

To manage Account Designees, click [Designee Maintenance] from the Account Settings menu.

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Designee Listing [Print this page](#)

This page provides the Designee(s) information for the individuals you have assigned to the account.

An Account Manager can only make changes to a pending Designee. Once the Designee has registered and has a Login ID, the Account Manager cannot make changes to the Designee information other than deleting the Designee from the account.

To make changes to the account of a particular Designee listed, select the link on the individual's last name. To delete a Designee select the Delete function to the left of the individual's name. Use the **Add a Designee** function to include an individual as a designee. Individuals added as designees will receive an e-mail notifying them that they have been invited to be a designee for the account.

Selecting Cancel will return you to the Home Page.

Delete	Last Name	First Name	E-mail Address	Passphrase	Status
X	LastName	FirstName	AAAAAAAAAA@AAAAA.AAA	12345	Pending
X	LastName	FirstName	BBBBBBBBBB@BBBBB.BBB	12345	Active

[Add Designee](#) [Cancel](#)

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

Slide notes

The Designee Listing page will display. All Account Designees and their associated statuses (Pending, Active, Locked, Expired, Revoked) will be listed.

To add a potential Account Designee, the Account Manager must first invite them. To initiate this process, click [Add Designee].

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The screenshot shows a web page titled "Designee Information". At the top, there 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 also present. The main content area has a light yellow background. It contains the following text: "Please click the Continue button to check the E-Mail Address of a potential designee. To cancel and return to the Designee Listing page, click the Cancel button." and "An asterisk (*) indicates a required field. We ask for the E-mail address to verify if the person is currently a registered user." Below this are two input fields: "*Designee E-mail Address:" and "*Re-enter Designee E-mail Address:". At the bottom of the form are two buttons: "Continue" (green with a right arrow) and "Cancel" (grey with a red X). To the right of the form is a "Quick Help" box with a link "Help About This Page". At the bottom of the page, there is a blue footer bar with links for "Privacy Policy" and "User Agreement".

Slide notes

The Designee Information page will display. Enter and re-enter the e-mail address of the Account Designee you wish to invite and click [Continue].

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Add Account Designee

System checks that e-mail is not in the database for existing user

- Existing user can be an Account Designee as long as they are not registered as an Account Representative for any MSPRP Account ID

Slide notes

The system will check that the entered e-mail address is not in the MSPRP system for an existing MSPRP user. An existing, registered user can be an Account Designee for your Account ID

as long as they are not already registered as an Account Representative for any MSPRP Account ID or as an Account Manager for this Account ID. Note: The Account Designee can be an Account Manager or an Account Designee on another account.

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The screenshot shows a web page titled "Designee Invitation". At the top, there 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 also present. Below the navigation bar, the main content area has a light yellow background. On the left, the "Designee Invitation" section contains the following text: "Please provide the name and a pass-phrase for the designee to enter during the registration process." and "An asterisk (*) indicates a required field." Below this are four input fields: "Designee First Name" (pre-filled with "Jane"), "Designee Last Name" (pre-filled with "Lewis"), "Passphrase" (pre-filled with "Sample Passphrase"), and "Re-enter Passphrase" (pre-filled with "Sample Passphrase"). At the bottom of this section are three buttons: "Previous" (with a left arrow), "Continue" (with a right arrow), and "Cancel" (with an 'x' icon). On the right side, there is a "Quick Help" box with a "Help About This Page" link. At the bottom of the page, there is a blue footer bar with the text "Privacy Policy | User Agreement".

Slide notes

If the entered e-mail address is found in the system (i.e., the invited Account Designee is already a registered user), the Designee Invitation page displays

with the Designee First and Last Name fields pre-populated based on the e-mail address that was entered on the Designee Information page.

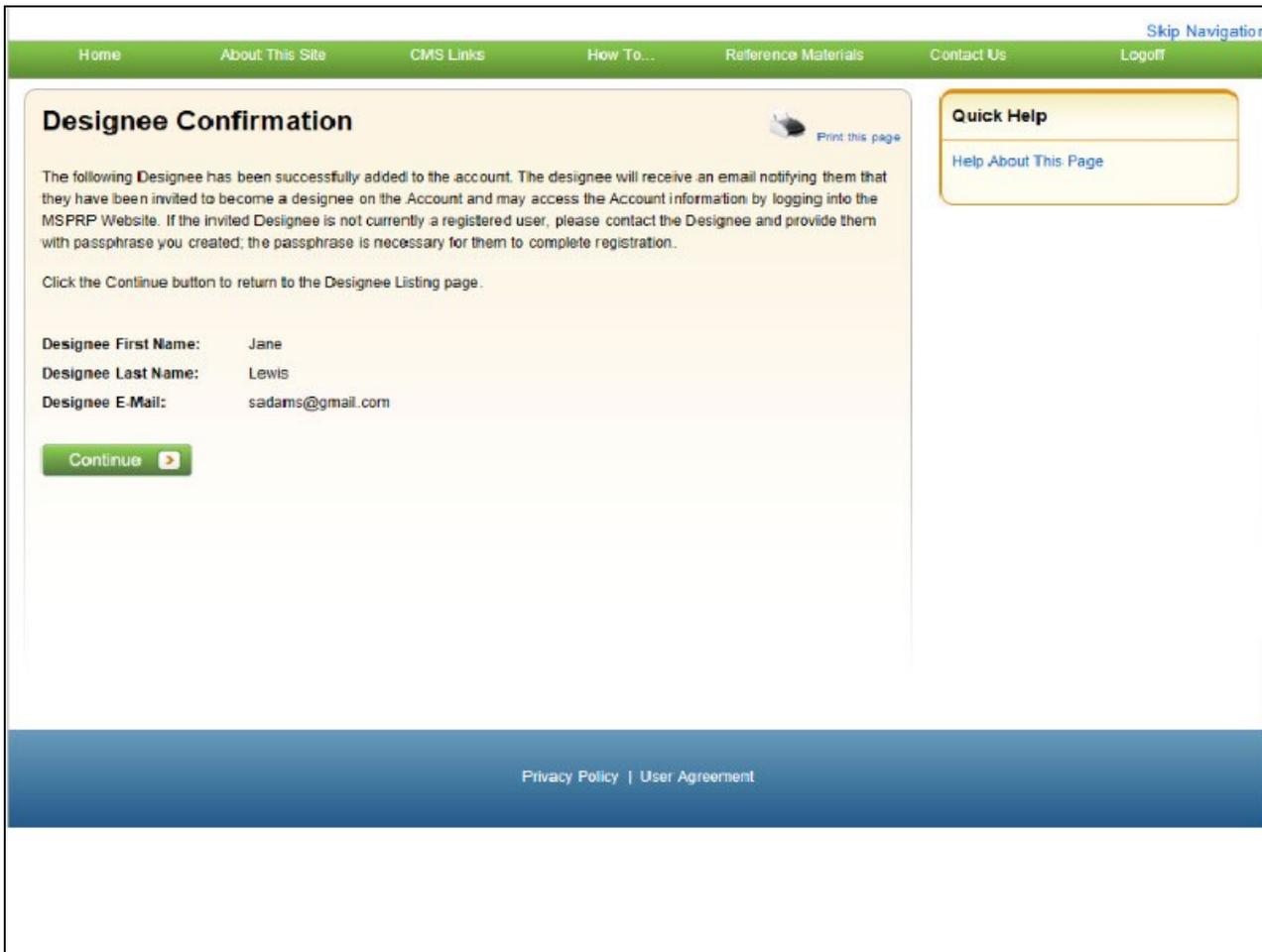
The Account Manager must verify and confirm that the information entered is for the correct Account Designee.

If the e-mail address is not found in the system, the Account Manager must enter the first and last name for the Account Designee, and create a Passphrase (a short, case-sensitive phrase, up to 30 characters).

The Passphrase is entered twice. Do not cut and paste this information. The Account Manager must contact their Account Designee and provide them with the Passphrase.

The Account Designee will need this passphrase in order to register. Click [Continue] to proceed.

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Slide notes

The Designee Confirmation page will display. This page confirms that the Account Designee has been invited to the account. Click [Continue].

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Designee Listing

This page provides the Designee(s) information for the individuals you have assigned to the account.

An Account Manager can only make changes to a pending Designee. Once the Designee has registered and has a Login ID, the Account Manager cannot make changes to the Designee information other than deleting the Designee from the account.

To make changes to the account of a particular Designee listed, select the link on the individual's last name. To delete a Designee select the Delete function to the left of the individual's name. Use the **Add a Designee** function to include an individual as a designee. Individuals added as designees will receive an e-mail notifying them that they have been invited to be a designee for the account.

Selecting Cancel will return you to the Home Page.

Delete	Last Name	First Name	E-mail Address	Passphrase	Status
X	LastName	FirstName	AAAAAAAAA@AAAAA.AAA	12345	Pending
X	LastName	FirstName	BBBBBBBBB@BBBBB.BBB	12345	Active

[Add Designee](#) [Cancel](#)

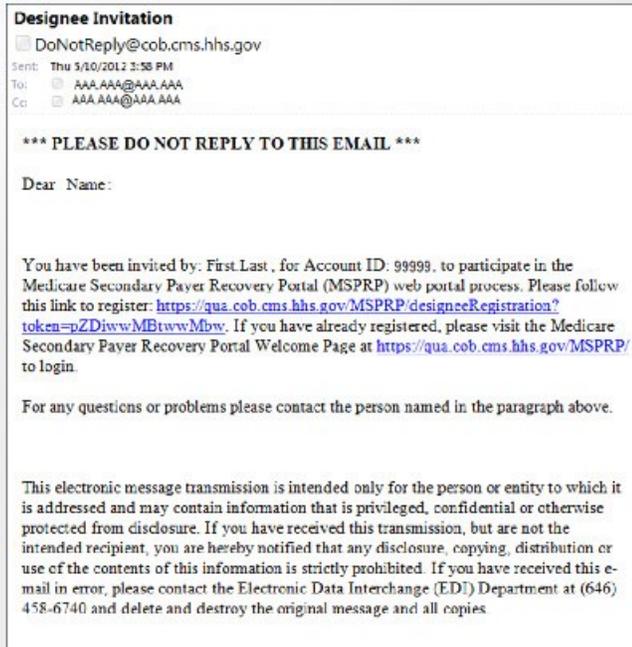
Privacy Policy | User Agreement

Slide notes

The Designee Listing page will re-display. If the entered e-mail address was found in the system (i.e., the invited Account Designee is already a registered user), the Account Designee will be listed with an 'Active' Status. If the e-mail address was not found in the system, the Account Designee is listed with a status of 'Pending.'

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Invitation E-mail



Slide notes

Once the invitation process is complete, the individual being invited as an Account Designee will receive an e-mail notifying them that they have been invited to be an Account Designee for the account.

If the Account Designee is an existing user (i.e., the invited Account Designee is a registered user of the Section 111 Coordination of Benefits Secure Web site (COBSW), Workers' Compensation Medicare Set-Aside Portal (WCMSAP),

Commercial Repayment Center Portal (CRCP), and/or the MSPRP as an Account Designee or Account Manager for another Account), they may log into the MSPRP and complete tasks related to the MSPRP account.

If the Account Designee is not an existing user, they must click on the link provided in the e-mail and enter the Passphrase that the Account Manager provided them with in order to successfully register for the MSPRP.

Once the registration has been completed, the Account Designee will be able to access the MSPRP account.

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Update Account Designee

'Pending' Account Designees

- Have not yet registered on MSPRP
- Account Manager can edit personal information

'Active' Account Designees

- Account Manager can view personal information
- Account Manager cannot make changes to Account Designee's information other than deleting them from the account

Slide notes

Account Designees in "Pending" status have not yet registered on the MSPRP. An Account Manager can edit personal information for Account Designees in "Pending" status.

Account Managers can only view personal information for Account Designees in "Active" status. Once the Account Designee has registered and has a Login ID, the Account Manager cannot make changes to the Account Designee's information other than deleting the Account Designee from the account.

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[Skip Navigation](#)

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

Designee Listing

[Print this page](#)

This page provides the Designee(s) information for the individuals you have assigned to the account.

An Account Manager can only make changes to a pending Designee. Once the Designee has registered and has a Login ID, the Account Manager cannot make changes to the Designee information other than deleting the Designee from the account.

To make changes to the account of a particular Designee listed, select the link on the individual's last name. To delete a Designee select the Delete function to the left of the individual's name. Use the **Add a Designee** function to include an individual as a designee. Individuals added as designees will receive an e-mail notifying them that they have been invited to be a designee for the account.

Selecting Cancel will return you to the Home Page.

Delete	Last Name	First Name	E-mail Address	Passphrase	Status
X	LastName	FirstName	AAAAAAAAA@AAAAA.AAA	12345	Pending
X	LastName	FirstName	BBBBBBBBB@BBBBB.BBB	12345	Active

[Add Designee](#) [Cancel](#)

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

Quick Help
[Help About This Page](#)

Slide notes

To make changes to the account of a particular Account Designee in 'Pending' status, click the last name of the Account Designee whose information you wish to update.

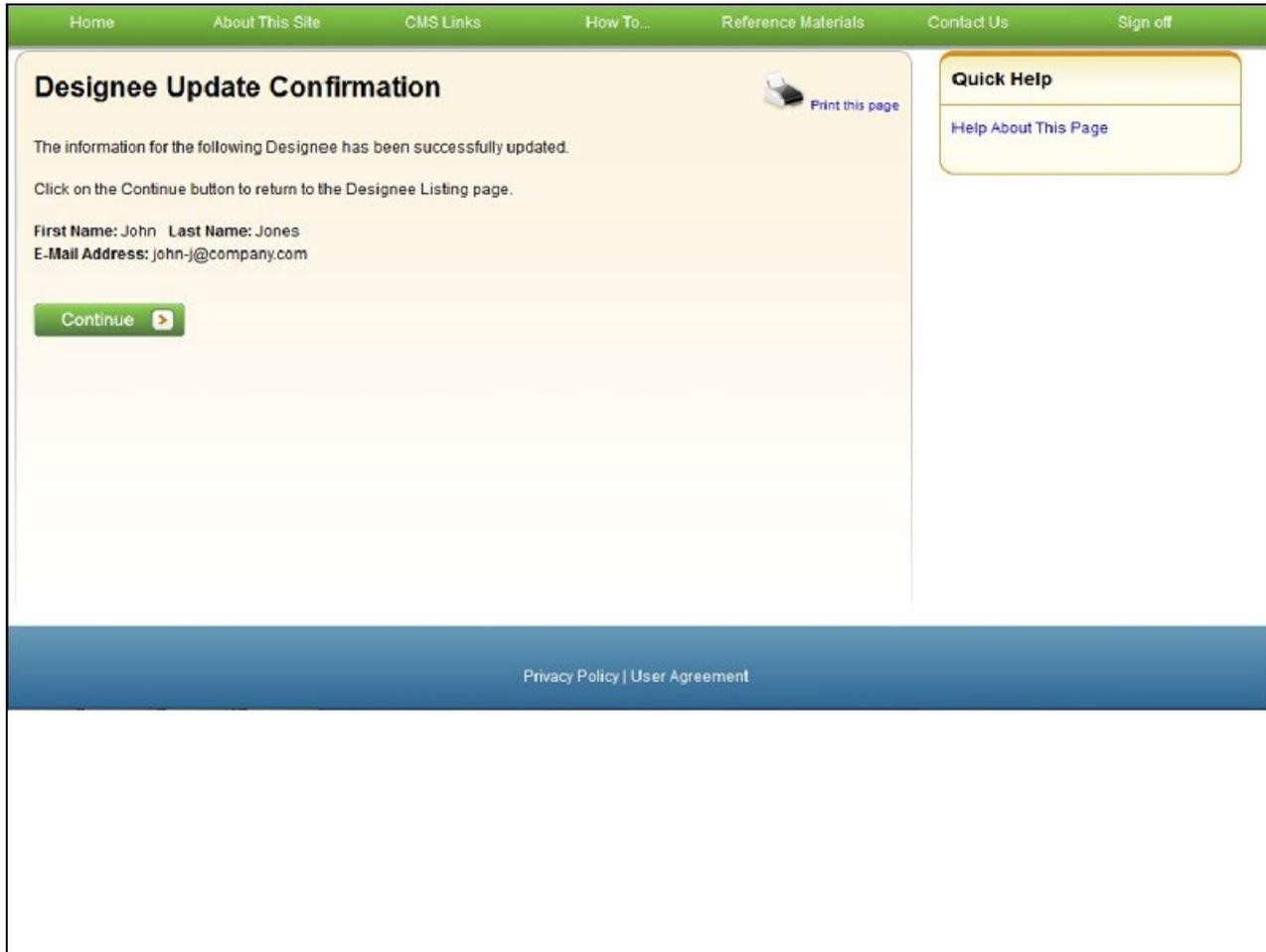
Slide 25 - of 41

The screenshot shows a web application interface for updating designee information. At the top, there 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 also present. The main content area is titled 'Update Designee Information' and includes a 'Print this page' icon. Below the title, there is instructional text: 'Please click the Continue button to update the information of a potential designee. To cancel and return to the Designee Listing page, click the Cancel button.' A note states: 'An asterisk (*) indicates a required field.' The form contains several input fields: 'Designee First Name' (with 'Jennifer' entered), 'Designee Last Name', 'Designee E-mail Address' (with '.l.com' entered), 'Re-enter Designee E-mail Address', 'Passphrase' (with 'test' entered), and 'Re-enter Passphrase'. There is a checkbox for 'Regenerate token. Check this box if another invitation e-mail must be sent to the Designee.' At the bottom of the form are 'Continue' and 'Cancel' buttons. To the right of the form is a 'Quick Help' box with a 'Help About This Page' link. A blue footer bar at the bottom contains links for 'Privacy Policy' and 'User Agreement'.

Slide notes

The Update Designee Information page displays, with the Account Designee's personal information open for editing. Edit the Account Designee's information as needed. Click [Continue].

Slide 26 - of 41



Slide notes

The Account Designee’s personal information is updated and the Designee Update Confirmation page displays.

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Regenerate Invitation E-mail

- If Account Designee misplaces/deletes e-mail or has not registered within 30 days
 - Account Manager can regenerate e-mail
 - Only for Account Designees in 'Pending' status
- Previous link will not work once new e-mail is generated

Slide notes

If the intended Account Designee has misplaced or deleted the invitation e-mail, or if the Account Designee has not registered within 30 days, the Account Manager can regenerate the invitation e-mail.

The previously-generated link will not work once a new e-mail is generated. Invitation e-mails can only be regenerated for Account Designees in 'Pending' status.

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Designee Listing [Print this page](#)

This page provides the Designee(s) information for the individuals you have assigned to the account.

An Account Manager can only make changes to a pending Designee. Once the Designee has registered and has a Login ID, the Account Manager cannot make changes to the Designee information other than deleting the Designee from the account.

To make changes to the account of a particular Designee listed, select the link on the individual's last name. To delete a Designee select the Delete function to the left of the individual's name. Use the **Add a Designee** function to include an individual as a designee. Individuals added as designees will receive an e-mail notifying them that they have been invited to be a designee for the account.

Selecting Cancel will return you to the Home Page.

Delete	Last Name	First Name	E-mail Address	Passphrase	Status
X	LastName	FirstName	AAAAAAAAAA@AAAAA.AAA	12345	Pending
X	LastName	FirstName	BBBBBBBBBB@BBBBB.BBB	12345	Active

[Add Designee](#) [Cancel](#)

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

Slide notes

On the Designee Listing page, click the last name of the Account Designee that needs the e-mail regenerated.

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The screenshot shows a web form titled "Update Designee Information" with a green navigation bar at the top containing links for Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Logoff. A "Skip Navigation" link is also present. The form includes a "Print this page" icon and a "Quick Help" box with a "Help About This Page" link. The main form area contains instructions, a required field indicator, and several input fields: "Designee First Name" (Jennifer), "Designee Last Name", "Designee E-mail Address" (ending in .com), "Re-enter Designee E-mail Address", "Passphrase" (test), and "Re-enter Passphrase". A checkbox for "Regenerate token" is also present. At the bottom of the form are "Continue" and "Cancel" buttons. A footer bar contains links for "Privacy Policy" and "User Agreement".

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

Update Designee Information

Please click the Continue button to update the information of a potential designee. To cancel and return to the Designee Listing page, click the Cancel button.

An asterisk (*) indicates a required field.

*Designee First Name: Jennifer

*Designee Last Name:

*Designee E-mail Address: .com

*Re-enter Designee E-mail Address:

*Passphrase: test

*Re-enter Passphrase:

Regenerate token. Check this box if another invitation e-mail must be sent to the Designee.

Continue Cancel

Privacy Policy | User Agreement

Slide notes

The Update Designee Information page displays. Select the Regenerate invitation E-mail check box beneath the Account Designee's personal information and then click [Continue].

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Designee Listing [Print this page](#)

This page provides the Designee(s) information for the individuals you have assigned to the account.

An Account Manager can only make changes to a pending Designee. Once the Designee has registered and has a Login ID, the Account Manager cannot make changes to the Designee information other than deleting the Designee from the account.

To make changes to the account of a particular Designee listed, select the link on the individual's last name. To delete a Designee select the Delete function to the left of the individual's name. Use the **Add a Designee** function to include an individual as a designee. Individuals added as designees will receive an e-mail notifying them that they have been invited to be a designee for the account.

Selecting Cancel will return you to the Home Page.

Delete	Last Name	First Name	E-mail Address	Passphrase	Status
X	LastName	FirstName	AAAAAAAAAA@AAAAA.AAA	12345	Pending
X	LastName	FirstName	BBBBBBBBBB@BBBBB.BBB	12345	Active

[Add Designee](#) [Cancel](#)

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

Slide notes

The Designee Listing page re-displays, with the Account Designee’s information unchanged. However, the system re-generates the invitation e-mail and sends it to the e-mail address registered for the Account Designee.

To remove an Account Designee from the MSPRP account, click the [X] button next to the individual’s name.

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Designee Listing [Print this page](#)

This page provides the Designee(s) information for the individuals you have assigned to the account.

An Account Manager can only make changes to a pending Designee. Once the Designee has registered and has a Login ID, the Account Manager cannot make changes to the Designee information other than deleting the Designee from the account.

To make changes to the account of a particular Designee listed, select the link on the individual's last name. To delete a Designee select the Delete function to the left of the individual's name. Use the **Add a Designee** function to include an individual as a designee. Individuals added as designees will receive an e-mail notifying them that they have been invited to be a designee for the account.

Selecting Cancel will return you to the Home Page.

Delete	Last Name	First Name	E-mail Address	Passphrase	Status
X	LastName	FirstName	AAAAAAAAAA@AAAAA.AAA	12345	Pending

[Add Designee](#) [Cancel](#)

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

Quick Help
[Help About This Page](#)

Slide notes

The Designee Listing page displays. The Account Designee that was deleted will no longer appear on the listing and will no longer be able to access this MSPRP account.

Note: The Account Designee will not be deleted from any other account they are associated with.

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

Delete Designee Confirmation

[Print this page](#)

Please click on the **Continue** button to confirm your delete request for this Account Designee. This will remove the individual from this Account ID only. The Designee will no longer have access to this Account ID but will retain access to any other accounts to which they are currently associated.

Click on the **Cancel** button to return to the Designee Listing page without deleting this Account Designee.

Designee First Name: Jane
Designee Last Name: Lewis
Designee E-Mail: sadams@gmail.com

Continue **Cancel**

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

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

Slide notes

The Delete Designee Confirmation page will display.

If you do not want to delete this Account Designee from the MSPRP account, click [Cancel] to return to the Designee Listing page. The Account Designee will still be listed with their status unchanged.

If you do want to delete this Account Designee from the MSPRP account, click [Continue].

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The screenshot shows a web application interface for the Medicare Secondary Payer Recovery Portal. At the top, there is a green navigation bar with links: Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Logoff. The main content area is divided into two columns. The left column has a 'Welcome!' heading and displays the user's account information as 'Account: ##### FIRST LAST'. Below this, there are several paragraphs of text explaining the portal's purpose and how to use it. At the bottom of this column are two blue links: 'Request Case Access' and 'Case Listing'. The right column contains two yellow-bordered boxes. The top box is titled 'Quick Help' and contains a blue link 'Help About This Page'. The bottom box is titled 'Account Settings' and contains three blue links: 'Update Account Information', 'Designee Maintenance', and 'View Account Activity'.

Slide notes

In order to access or manage a case, you will need to link (add) the case to your account using the Request Case Access link. You must always perform this step to link a case to your MSPRP account for the first time.

To link (add) a case to the Account, click [Request Case Access].

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New Case Request

The information requested below will be systematically validated to ensure you have the appropriate authority to access the ReMAS case. Once the information is validated, you can perform specific actions on the case, upload corresponding documentation in PDF file format, request conditional payment letter

To begin the new case inquiry process, enter the required data and click the Continue button. To cancel the case creation click the Cancel button to return to the Home page.

*Case ID: OR *Date of Incident: / /

*HICN: OR *SSN: - -

*Last Name: (at least first five letters)

*Beneficiary's Date of Birth: / / (MM/DD/CCYY)

Insurance Type: (dropdown menu open showing: , , ,)

Slide notes

The New Case Request page displays. Enter the following information for the case you want to access: Case ID or Date of Incident (DOI),

Beneficiary Health Insurance Claim Number (HICN) or Social Security Number (SSN), Beneficiary Last Name, Beneficiary' Date of Birth, and optionally, the Insurance Type.

If the MSPRP cannot locate the case based on the submitted information, it will display the following message: "No Matching Case Records Found based on the information provided."

Verify that the data was entered correctly. If any of the fields were incorrectly entered, correct the error and click [Continue].

Note: The following cases will not be available on the MSPRP: cases referred to CMS, cases referred to Department of Justice, and cases involving Workers' Compensation Medicare Set-Aside Amount (WCMSA).

WCMSA cases are only accessible on the Workers' Compensation Medicare Set-Aside Portal (WCMSAP).

For information on the WCMSAP, see the following link: <http://go.cms.gov/wcmsa>.

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Home	About This Site	CMS Links	How To...	Reference Materials	Contact Us	Sign off		
Case Information								
<div style="text-align: right;"> Print this page Quick Help: Help About This Page </div>								
<table border="0"> <tr> <td style="vertical-align: top;"> Case ID: 201117409000150 Case Type: Liability Insurance Case Status: Demand Issued What is this? Beneficiary Medicare Number: ****6789A Beneficiary DOB: 02/09/1940 Beneficiary Last Name: Smith Authorization Level: 11 (not of Representation) Authorization Status: Verified Conditional Payment Notice Amount: \$500.00 Conditional Payment Notice Mail Date: 05/15/2011 Conditional Payment Notice Response Due Date: 07/31/2011 </td> <td style="vertical-align: top;"> Rights and Responsibilities Letter Mail Date: 06/01/2010 Date of Incident: 08/15/2008 Industry Date of Incident: 09/15/2009 What is this? Conditional Payment Letter Mail Date: 06/01/2011 Current Conditional Payment Amount: \$2800.00 Conditional Payment Amount Updated on: 06/01/2011 Demand Letter Mail Date: 06/01/2011 Demand Amount: \$3754.00 </td> </tr> </table>							Case ID: 201117409000150 Case Type: Liability Insurance Case Status: Demand Issued What is this? Beneficiary Medicare Number: ****6789A Beneficiary DOB: 02/09/1940 Beneficiary Last Name: Smith Authorization Level: 11 (not of Representation) Authorization Status: Verified Conditional Payment Notice Amount: \$500.00 Conditional Payment Notice Mail Date: 05/15/2011 Conditional Payment Notice Response Due Date: 07/31/2011	Rights and Responsibilities Letter Mail Date: 06/01/2010 Date of Incident: 08/15/2008 Industry Date of Incident: 09/15/2009 What is this? Conditional Payment Letter Mail Date: 06/01/2011 Current Conditional Payment Amount: \$2800.00 Conditional Payment Amount Updated on: 06/01/2011 Demand Letter Mail Date: 06/01/2011 Demand Amount: \$3754.00
Case ID: 201117409000150 Case Type: Liability Insurance Case Status: Demand Issued What is this? Beneficiary Medicare Number: ****6789A Beneficiary DOB: 02/09/1940 Beneficiary Last Name: Smith Authorization Level: 11 (not of Representation) Authorization Status: Verified Conditional Payment Notice Amount: \$500.00 Conditional Payment Notice Mail Date: 05/15/2011 Conditional Payment Notice Response Due Date: 07/31/2011	Rights and Responsibilities Letter Mail Date: 06/01/2010 Date of Incident: 08/15/2008 Industry Date of Incident: 09/15/2009 What is this? Conditional Payment Letter Mail Date: 06/01/2011 Current Conditional Payment Amount: \$2800.00 Conditional Payment Amount Updated on: 06/01/2011 Demand Letter Mail Date: 06/01/2011 Demand Amount: \$3754.00							
NEW - Final Conditional Payment Process								
<table border="0"> <tr> <td style="vertical-align: top;"> Final Conditional Payment Process Initiated : 01/01/2006 120 days' Notice of Anticipated Settlement Mail Date: 01/03/2006 Final Conditional Payment Requested: 01/01/2006 14:55 </td> <td style="vertical-align: top;"> Request Final Conditional Payment by: 04/02/2006 Final Conditional Payment Status: Active Final Conditional Payment Status Date: 01/01/2006 Final Conditional Payment Amount: \$3754.00 </td> </tr> </table>							Final Conditional Payment Process Initiated : 01/01/2006 120 days' Notice of Anticipated Settlement Mail Date: 01/03/2006 Final Conditional Payment Requested: 01/01/2006 14:55	Request Final Conditional Payment by: 04/02/2006 Final Conditional Payment Status: Active Final Conditional Payment Status Date: 01/01/2006 Final Conditional Payment Amount: \$3754.00
Final Conditional Payment Process Initiated : 01/01/2006 120 days' Notice of Anticipated Settlement Mail Date: 01/03/2006 Final Conditional Payment Requested: 01/01/2006 14:55	Request Final Conditional Payment by: 04/02/2006 Final Conditional Payment Status: Active Final Conditional Payment Status Date: 01/01/2006 Final Conditional Payment Amount: \$3754.00							
<p>Please select an action from the following list, if the option is disabled (grayed out) it may not be available for the case at this time:</p> <ul style="list-style-type: none"> <input type="radio"/> View / Request Authorizations <input type="radio"/> Request an update to the conditional payment amount What is this? <input type="radio"/> Request an electronic conditional payment letter with Current Conditional Payment Amount What is this? <input type="radio"/> Request a mailed copy of the conditional payment letter What is this? <input type="radio"/> Begin Final Conditional Payment Process and Provide 120 Days' Notice of Anticipated Settlement What is this? <input type="radio"/> Calculate Final Conditional Payment Amount What is this? <input type="radio"/> Request an electronic Dispute Denial for Final Conditional Payment Case Letter with Current Conditional Payment Amount What is this? <input type="radio"/> View / Dispute Claims Listing What is this? <input type="radio"/> Provide the Notice of Settlement Information <input type="radio"/> Initiate Demand Letter What is this? 								
<div style="display: flex; justify-content: space-between;"> Continue Cancel </div>								

Slide notes

If the MSPRP locates the case based on the information submitted, the Case Information page will display and the case will be added to the Case Listing page for the account.

The top-half of the Case Information page allows you to view information related to the case.

The middle portion of the page allows you to view Final Conditional Payment Process information (if applicable) and the bottom half of the Case Information page identifies various actions that can be taken on a case which may include:

View/Request Authorization (Beneficiary Proof of Representation, Beneficiary Consent to Release, or Recovery Agent Authorization); Request an update to the conditional payment amount; Request a copy of the conditional payment letter;

View/Dispute Claims Listing, Provide the Notice of Settlement Information and initiate Demand Letter. Note: Only actions that are applicable to the case will display.

For example, a recovery case initiated by the Commercial Repayment Center (CRC) based on an insurer's or workers' compensation entity's ongoing responsibility for medicals will not involve a settlement.

Therefore, the update the conditional payment amount, request a copy of the conditional payment letter and provide notice of settlement information actions will not display.

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The screenshot shows a web application interface with a green navigation bar at the top containing links for Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Logoff. The main content area is divided into two columns. The left column features a 'Welcome!' section with a greeting 'Account: ##### FIRST LAST' and 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 blue links: 'Request Case Access' and 'Case Listing'. The right column contains two yellow-bordered boxes. The top box is titled 'Quick Help' and contains a link 'Help About This Page'. The bottom box is titled 'Account Settings' and contains three links: 'Update Account Information', 'Designee Maintenance', and 'View Account Activity'.

Slide notes

To view and manage cases that have been associated/linked to your MSPRP account, click [Case Listing].

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Case Listing

The following are the case inquiries associated to Account ID: #####

To view case detail information, click the case number. To manage Designee access to the case, click on the Manage Access link.

To perform a search, enter any search criteria and click the Search button.

Case ID: [Search Hint](#)

Beneficiary HICN:

Beneficiary SSN: - -

Beneficiary Last Name: [Search Hint](#)

Selecting Cancel will return to the Home Page.

Cases

Case ID	Bene Last Name	Bene HICN/SSN	Bene Date of Birth	Case Access
#####	AAAAAAA	*****##A	MM/DD/YYYY	
#####	BBBBBBB	*****##A	MM/DD/YYYY	

Slide notes

The cases that are associated to your MSPRP account appear at the bottom of this page. The Case ID, beneficiary's last name, beneficiary's HICN/SSN and beneficiary's date of birth are noted for each case.

To view case information on a specific case, you will click the [Case ID] link that appears in the list of cases. This will take you to the Case Information page for that case.

To manage access to the case, select [Manage Access].

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The screenshot shows a web application interface for managing case access. At the top, there 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 also present. The main content area is titled 'Manage Case Access' and includes a 'Print this page' icon. Below the title, the 'Case ID' is masked with asterisks and the 'Beneficiary Last Name' is 'AAAA'. A paragraph of instructions explains how to use checkboxes to select or de-select designees. A table lists designees with their names and checkboxes for granting or revoking access. The first designee, 'AAAA AAAAAA', has a checked checkbox. A 'Select All' checkbox is also present. At the bottom of the table are 'Continue' and 'Cancel' buttons. A 'Quick Help' box on the right contains a 'Help About This Page' link. A blue footer bar contains links for 'Privacy Policy' and 'User Agreement'.

Designee Name	Grant/Revoke Access
AAAA AAAAAA	<input checked="" type="checkbox"/>
	<input type="checkbox"/> Select All

Slide notes

The Manage Case Access page displays. This page allows you to grant or revoke an Account Designee's access for the Case ID and Beneficiary Last Name displayed at the top of the page.

This page displays all Account Designees currently associated to your account.

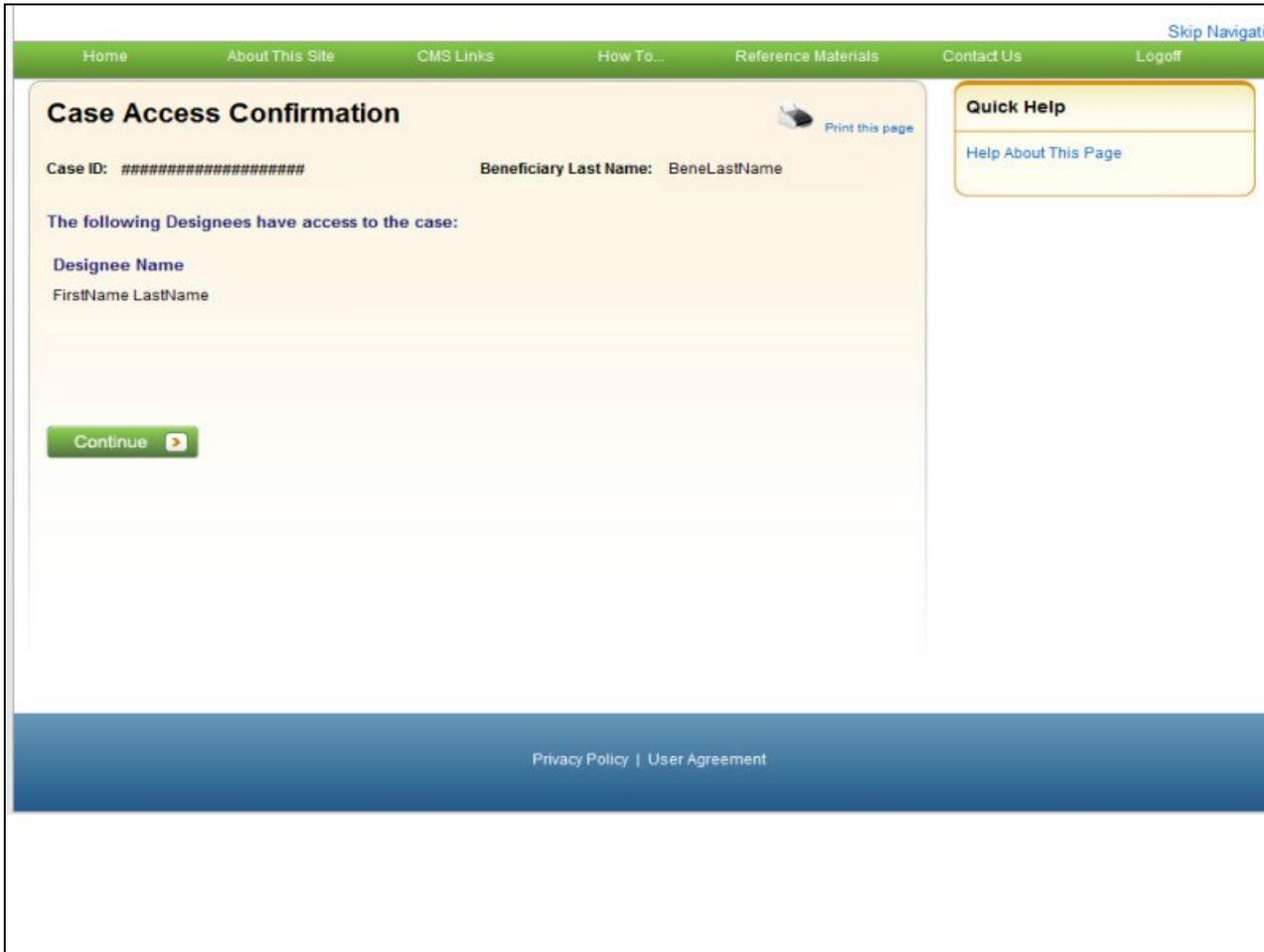
Click the [Grant/Revoke Access] checkbox next to the Designee name to grant or revoke access to the Account Designee. A checked box means the Account Designee has been granted access to the case.

A blank (unchecked) box means that they do not have access to the case/their access has been revoked.

To include/exclude all Account Designees in having access to the case, click the [Select All] checkbox. This is a toggle on/off switch to select/de-select Account Designees. Click to select all Account Designees, click again to de-select all Account Designees.

When you have completed your selections, click [Continue].

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Slide notes

The Case Access Confirmation page displays. The list of Account Designees that have access to this case is displayed. Click [Continue] to return to the Case Listing page.

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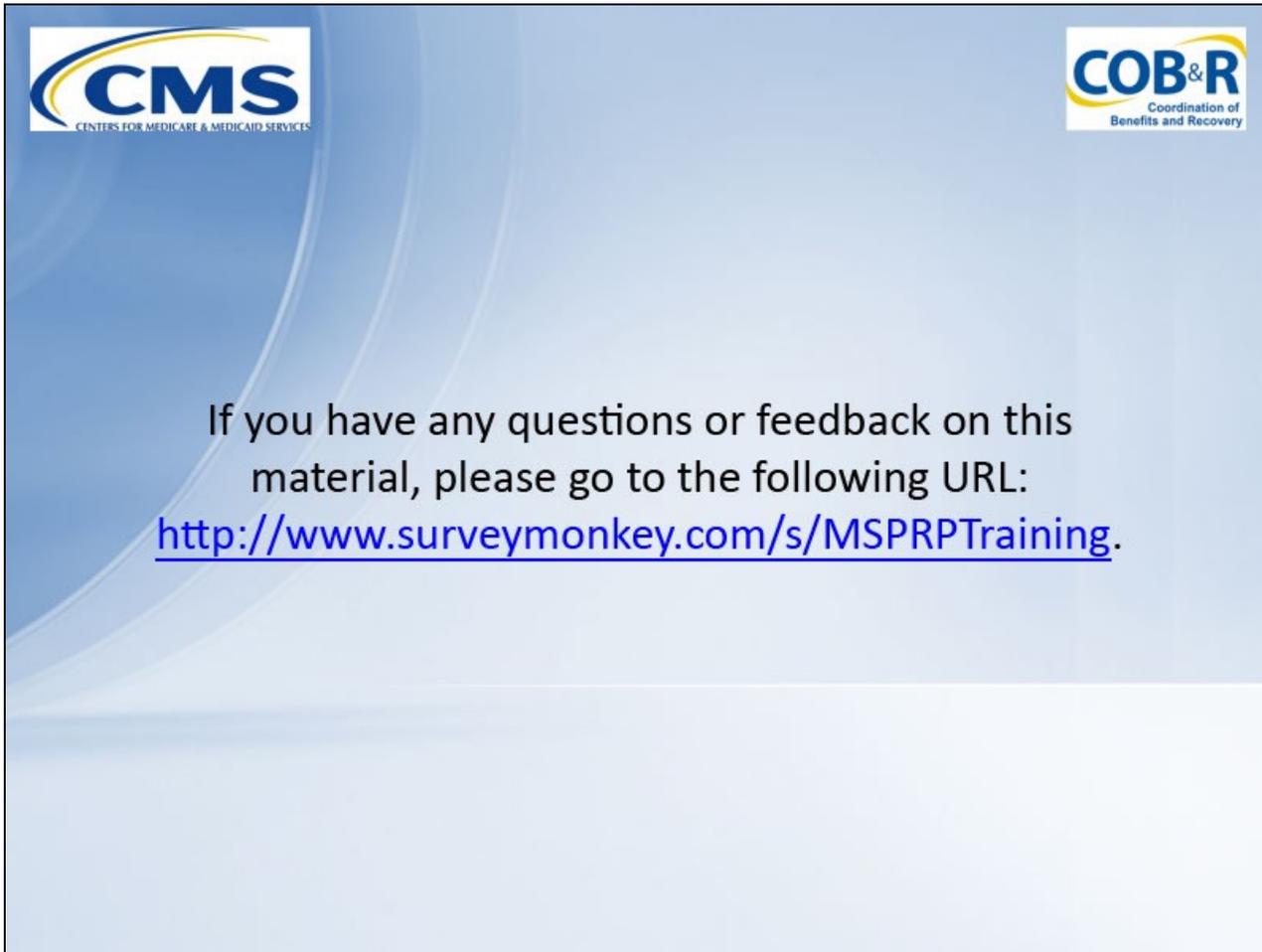


You have completed the MSPRP Account Manager Functions course. Information in this course can be referenced by using the MSPRP User Manual found at the following link: <https://www.cob.cms.hhs.gov/MSPRP/>. For general information on Medicare Secondary Payer Recovery, go to this URL: <http://go.cms.gov/cobro>.

Slide notes

You have completed the MSPRP Account Manager Functions 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>.

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The slide features a light blue background with a white curved graphic on the left side. 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 text is centered and reads: "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>.