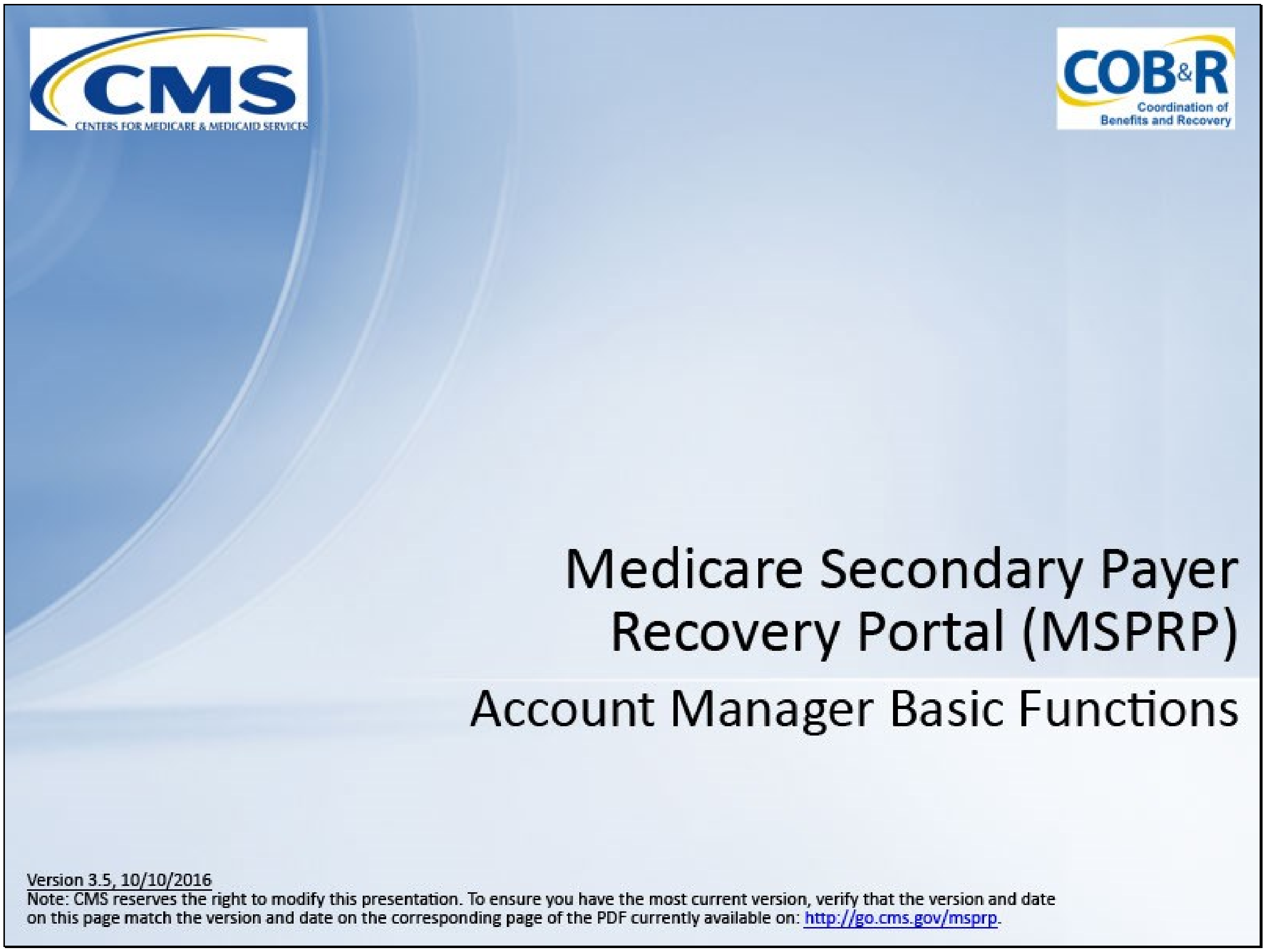
Slide 1 - of 41



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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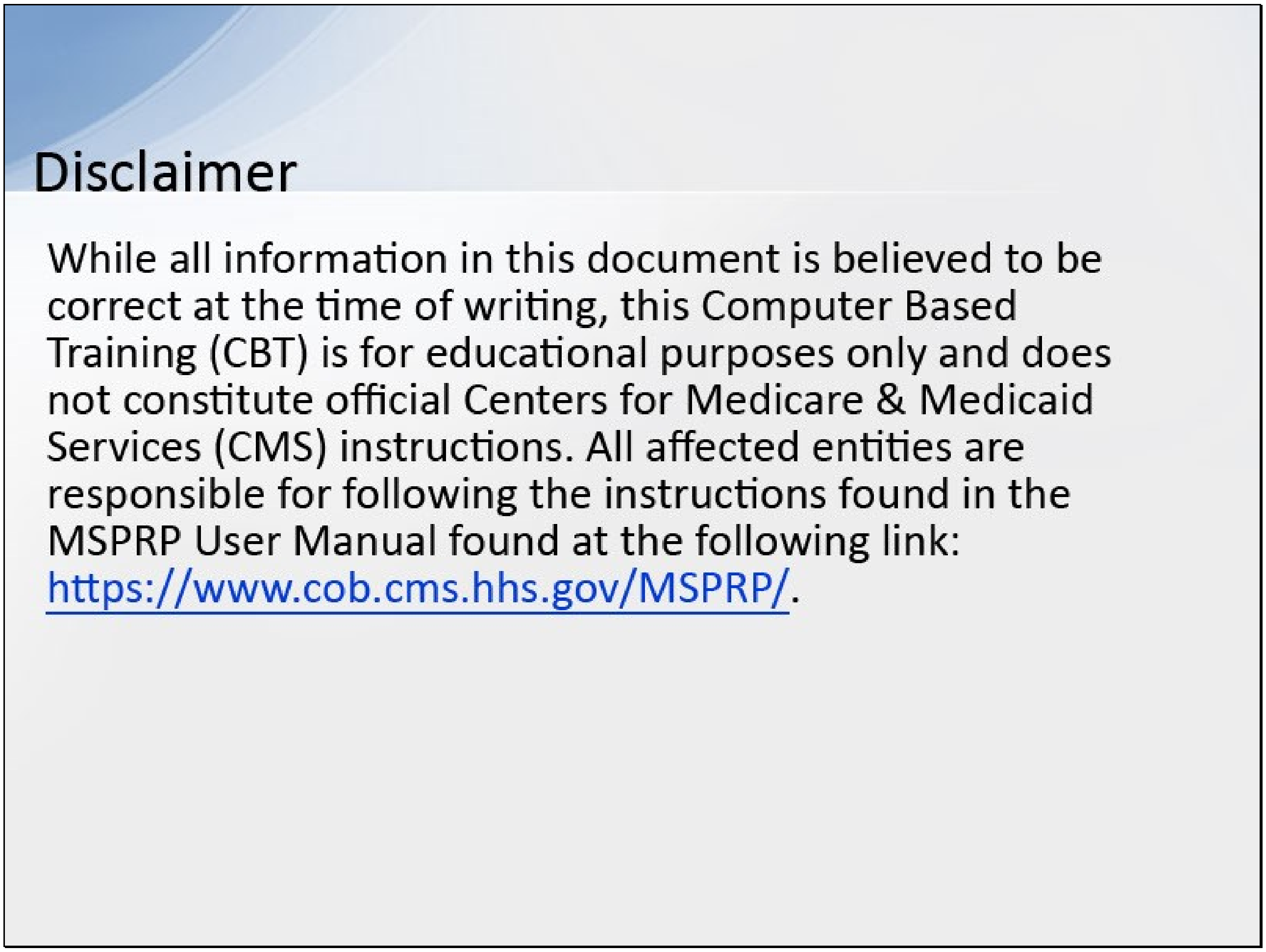

Slide notes

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/.

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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.

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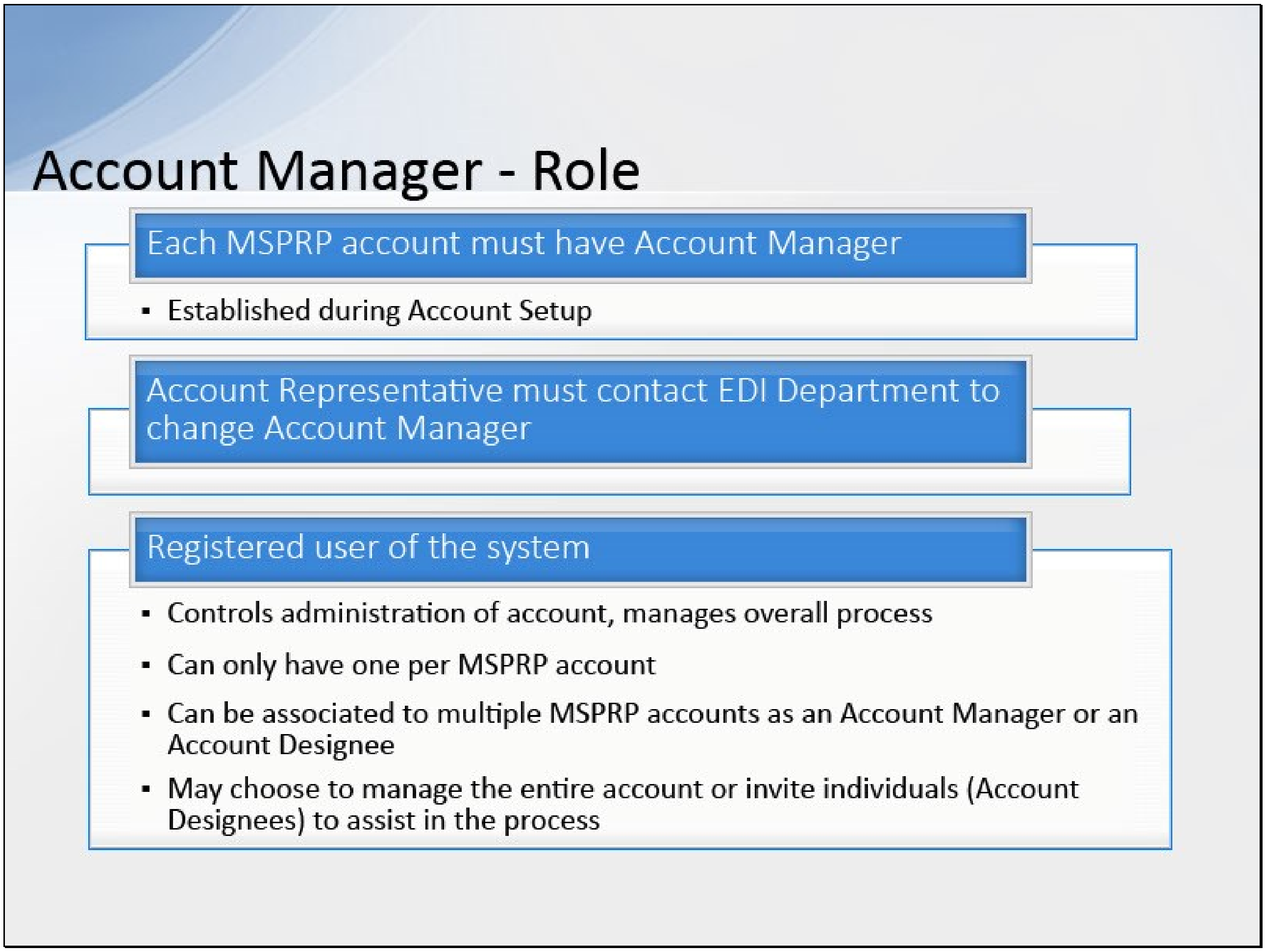

Slide notes

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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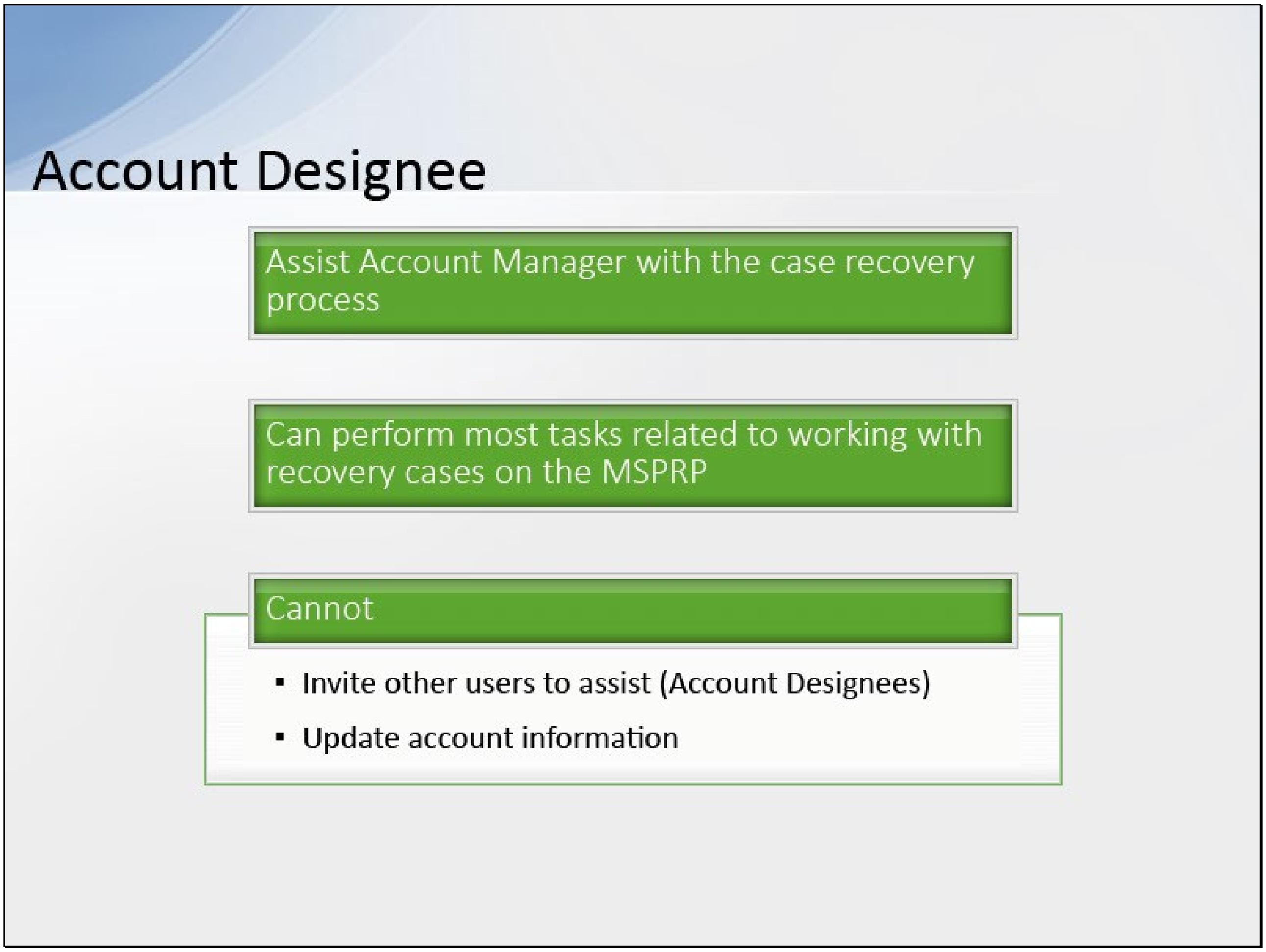

Slide notes

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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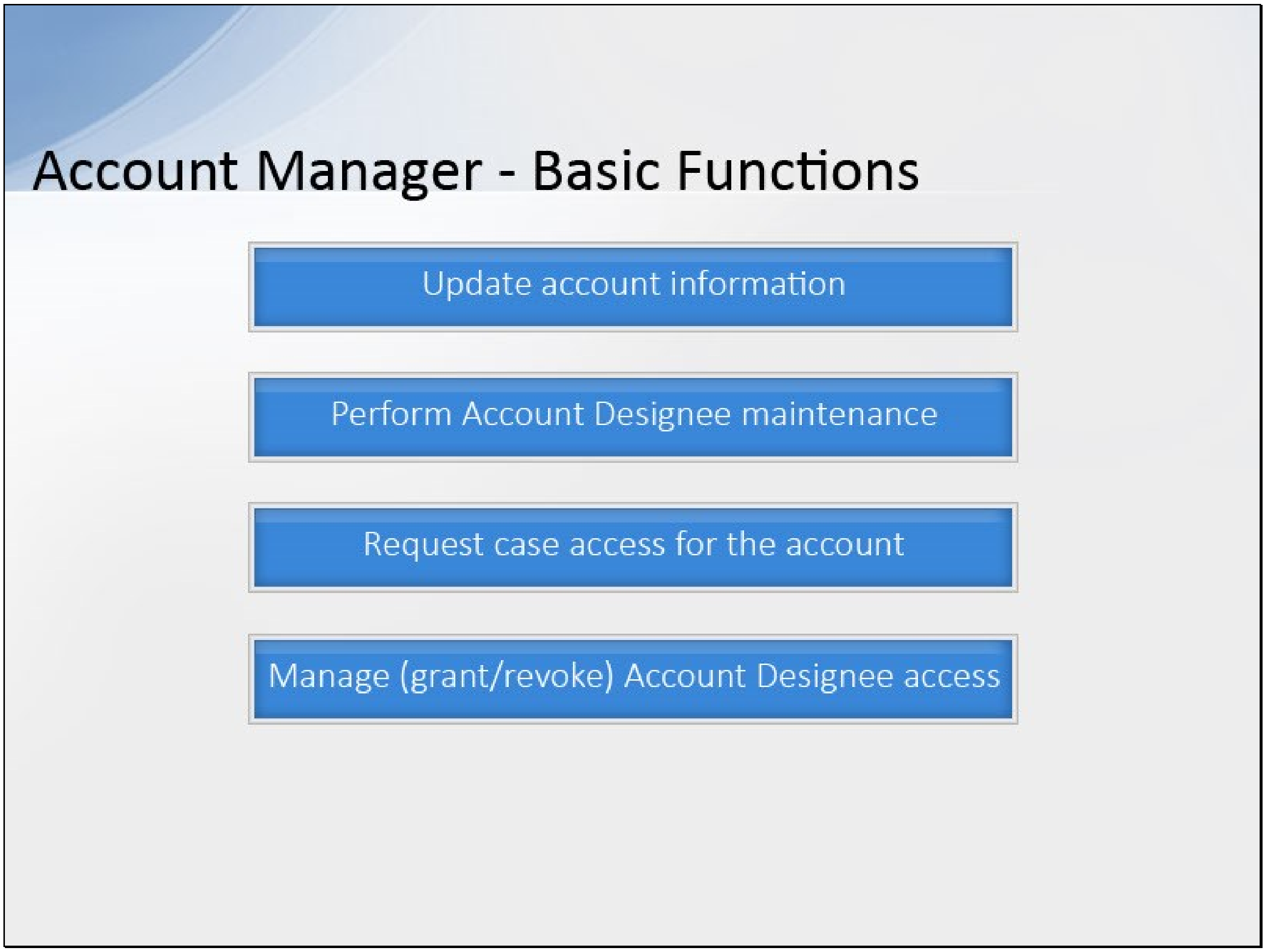

Slide notes

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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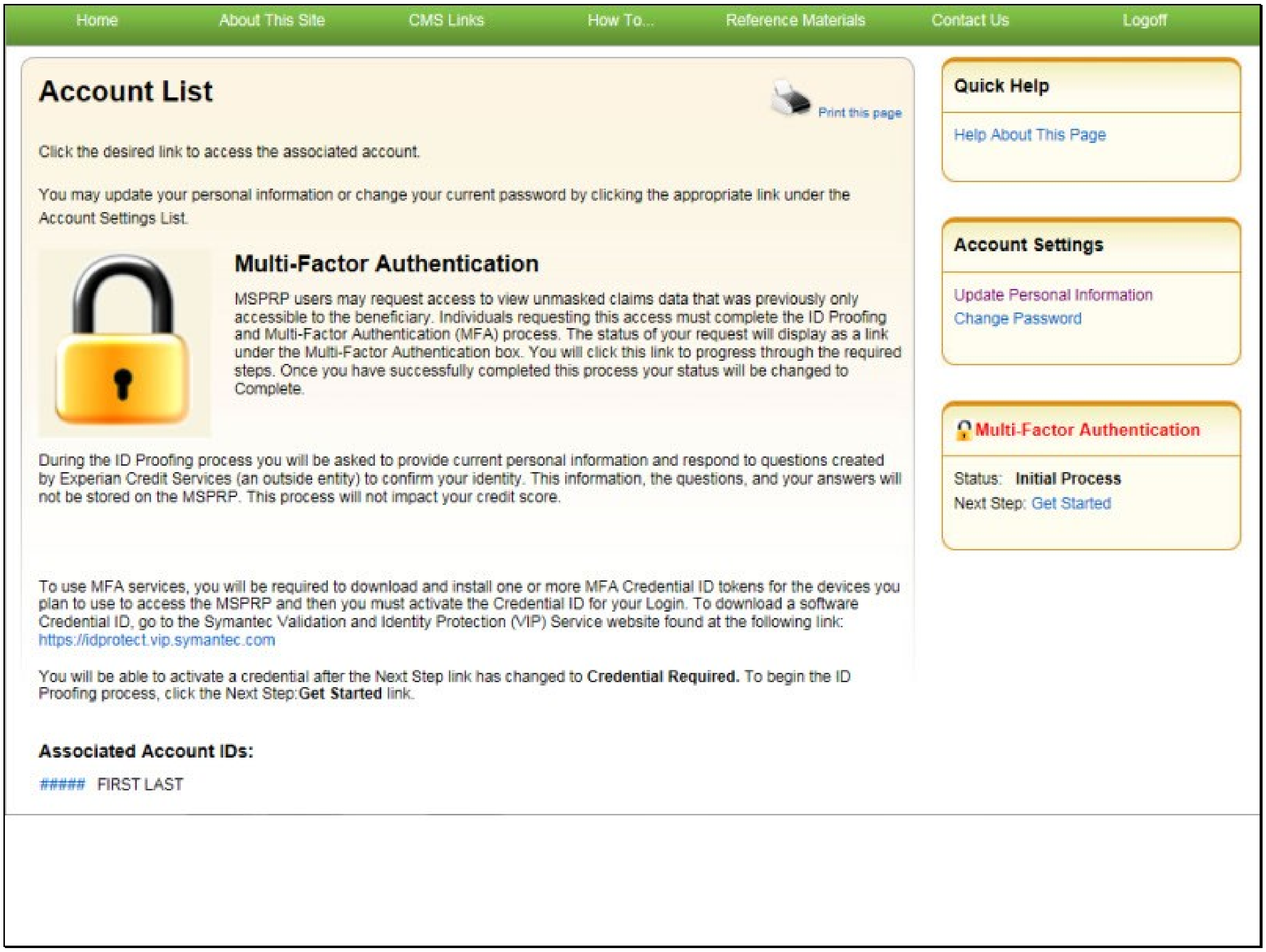

Slide notes

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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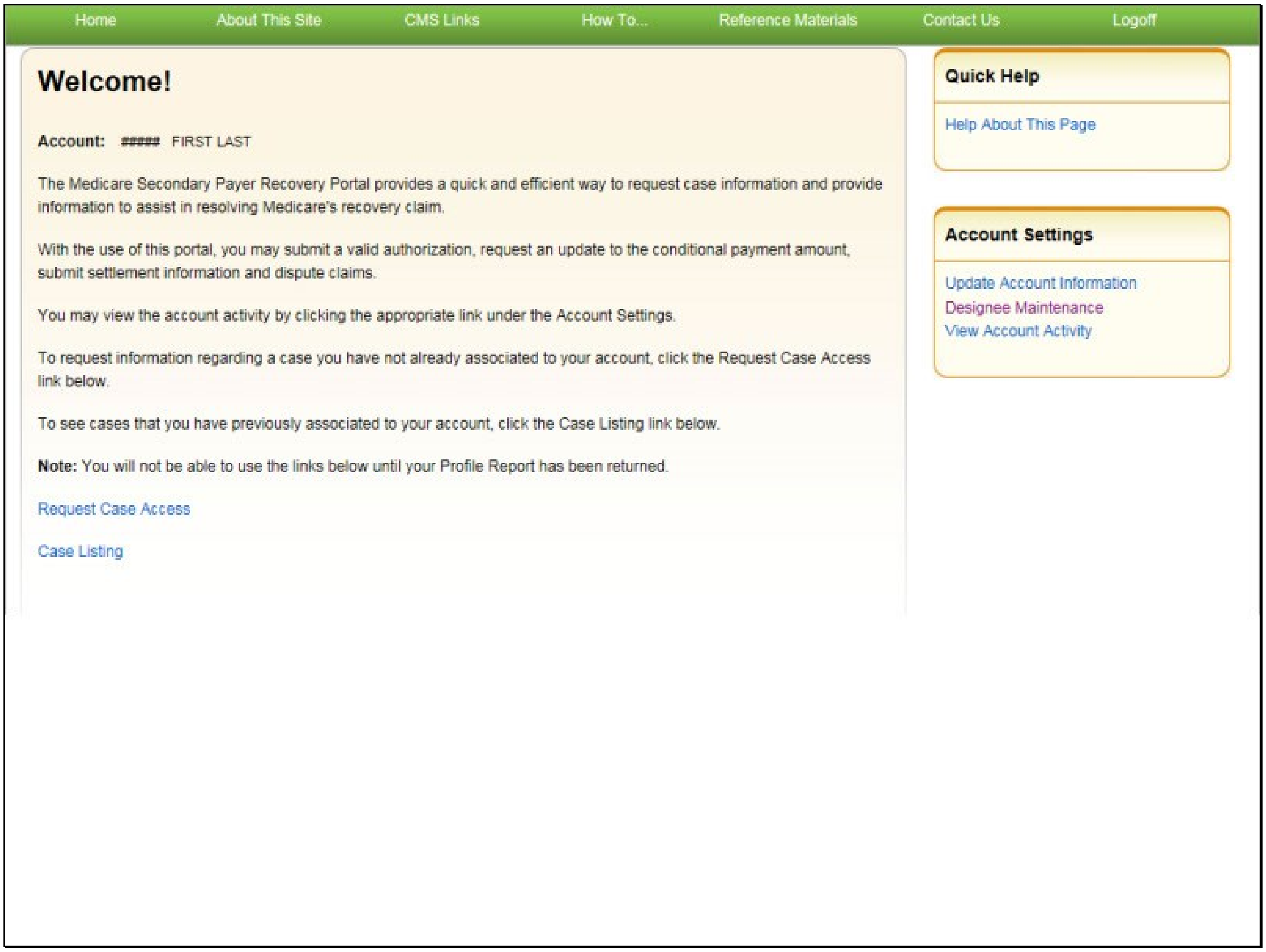

Slide notes

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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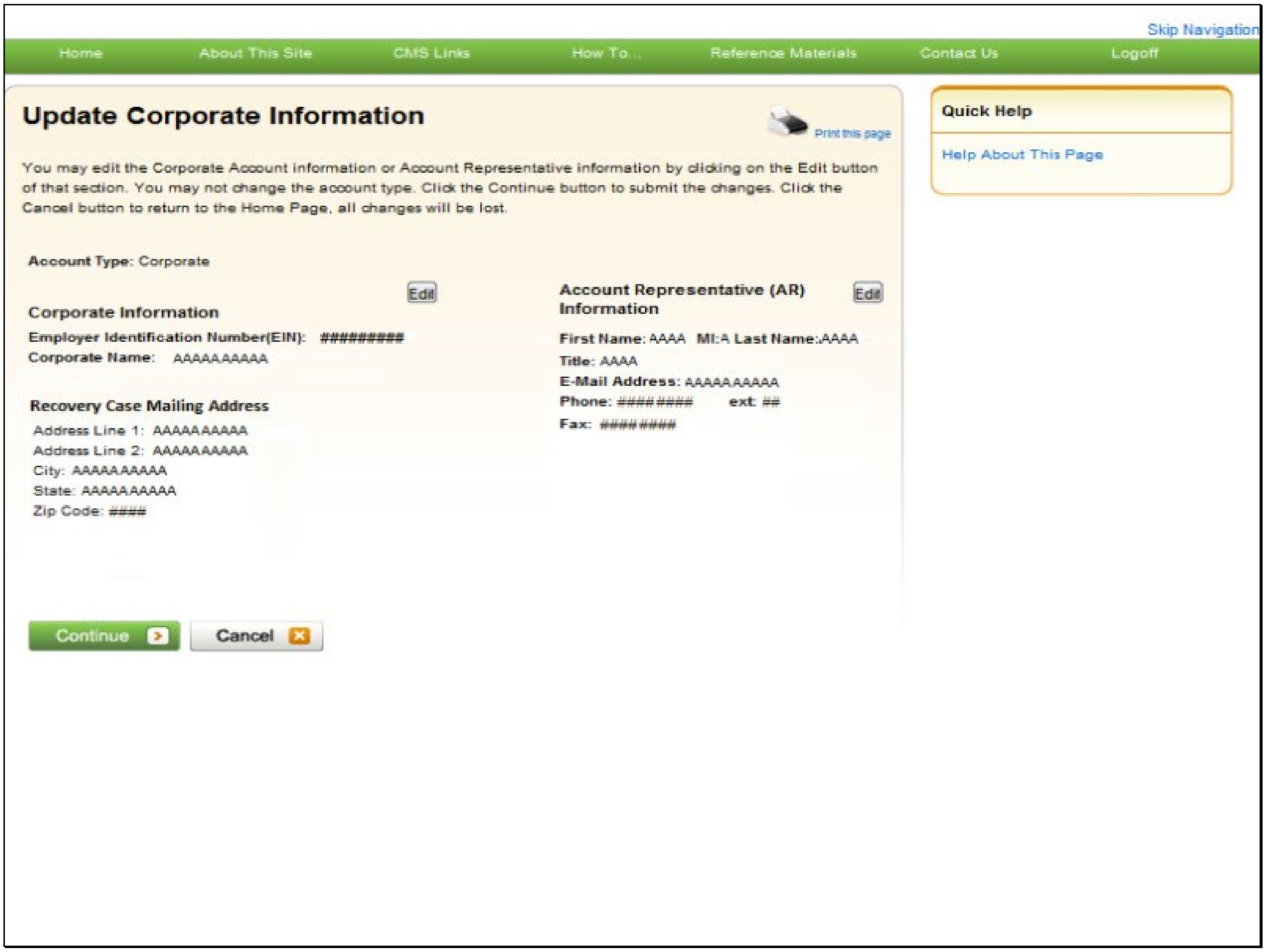

Slide notes

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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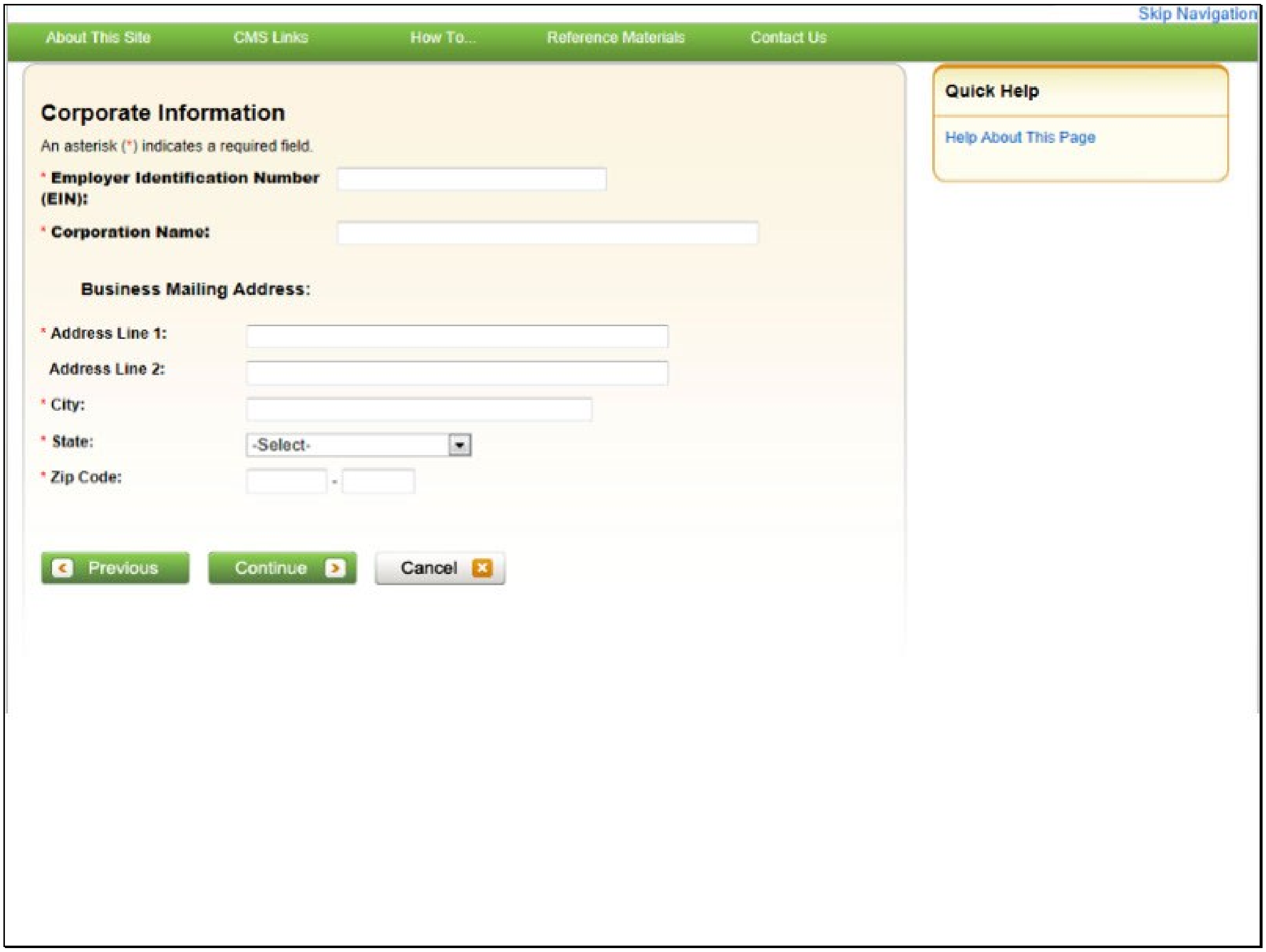

Slide notes

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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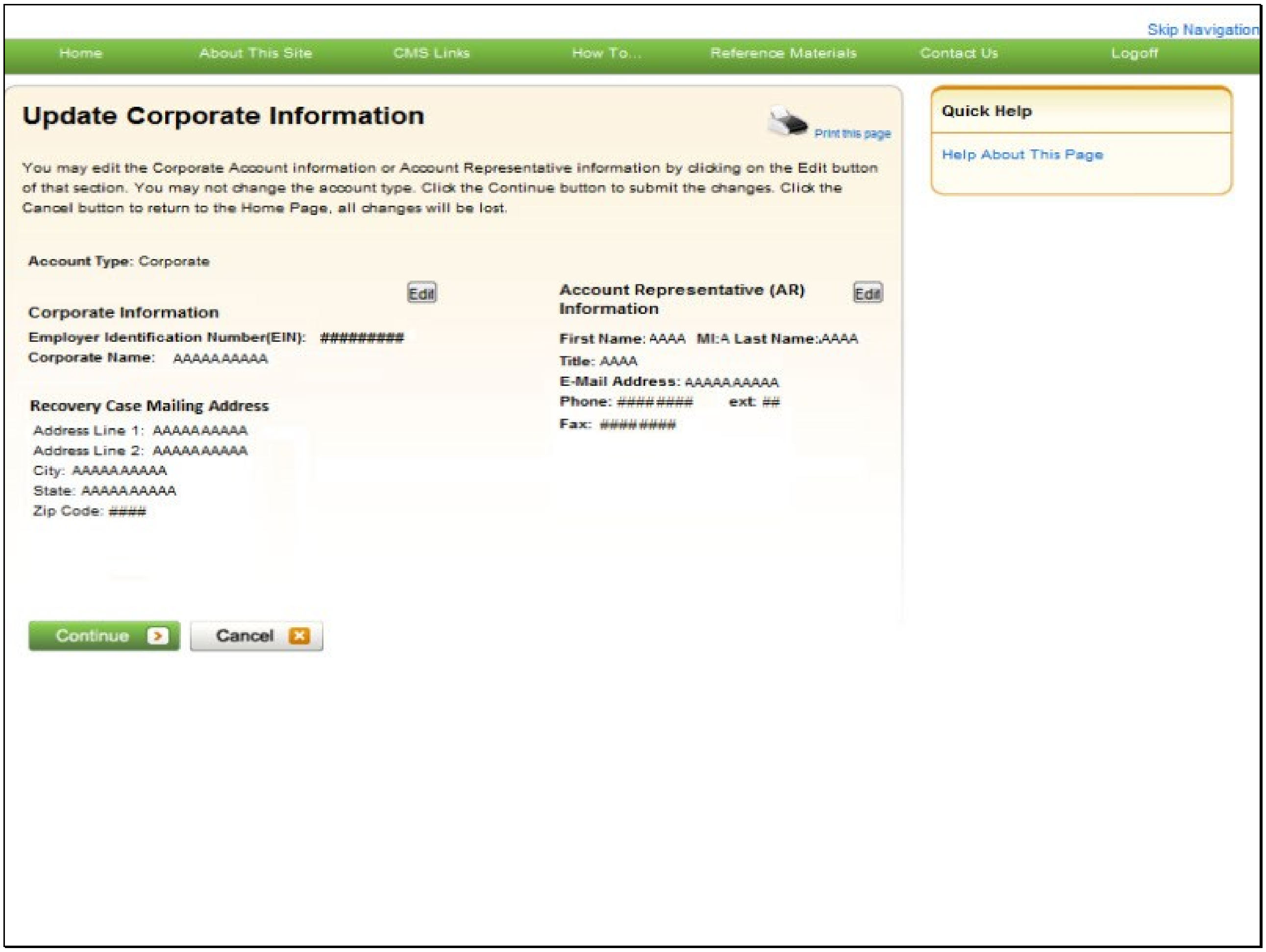

Slide notes

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

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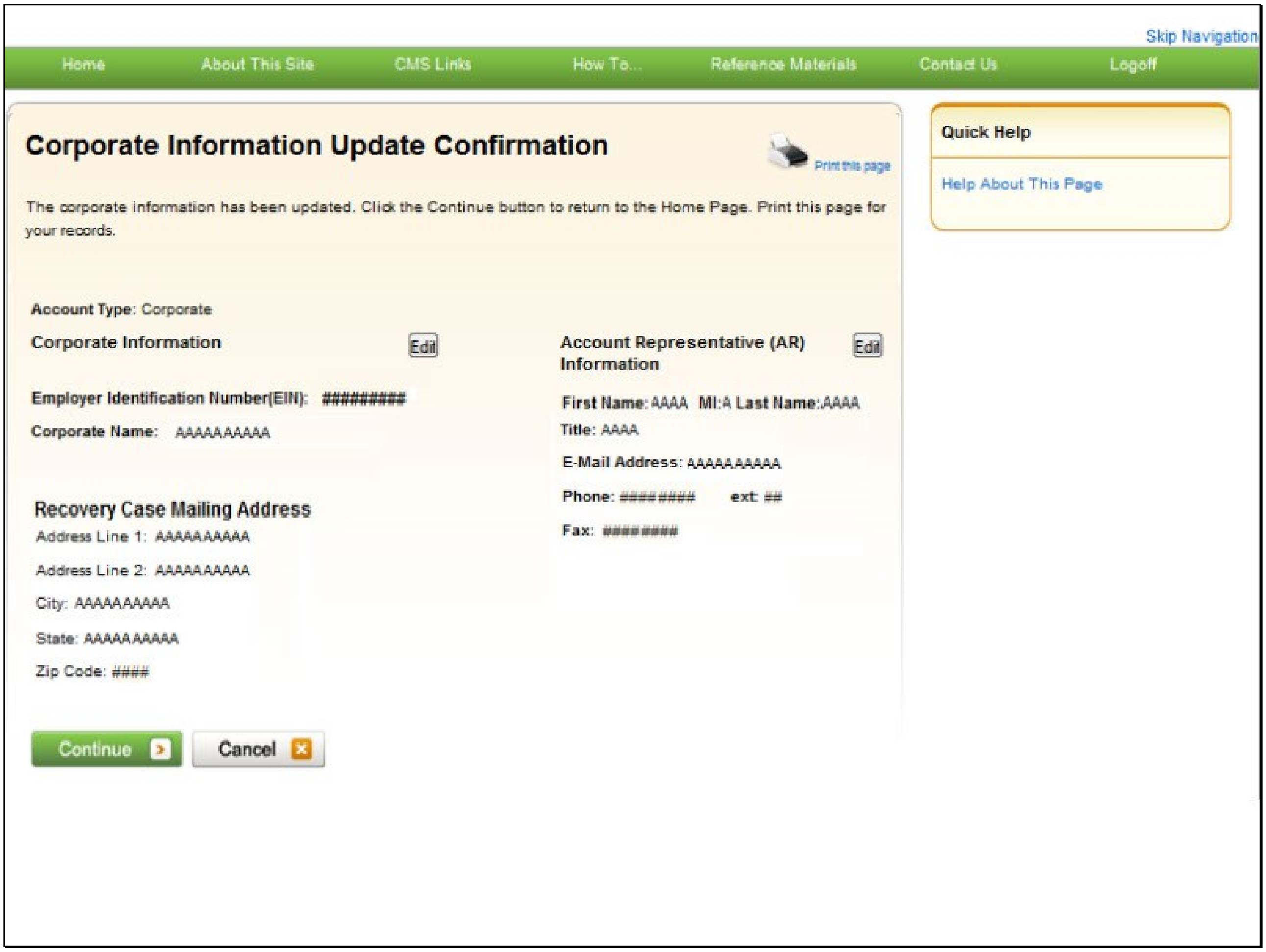

Slide notes

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.

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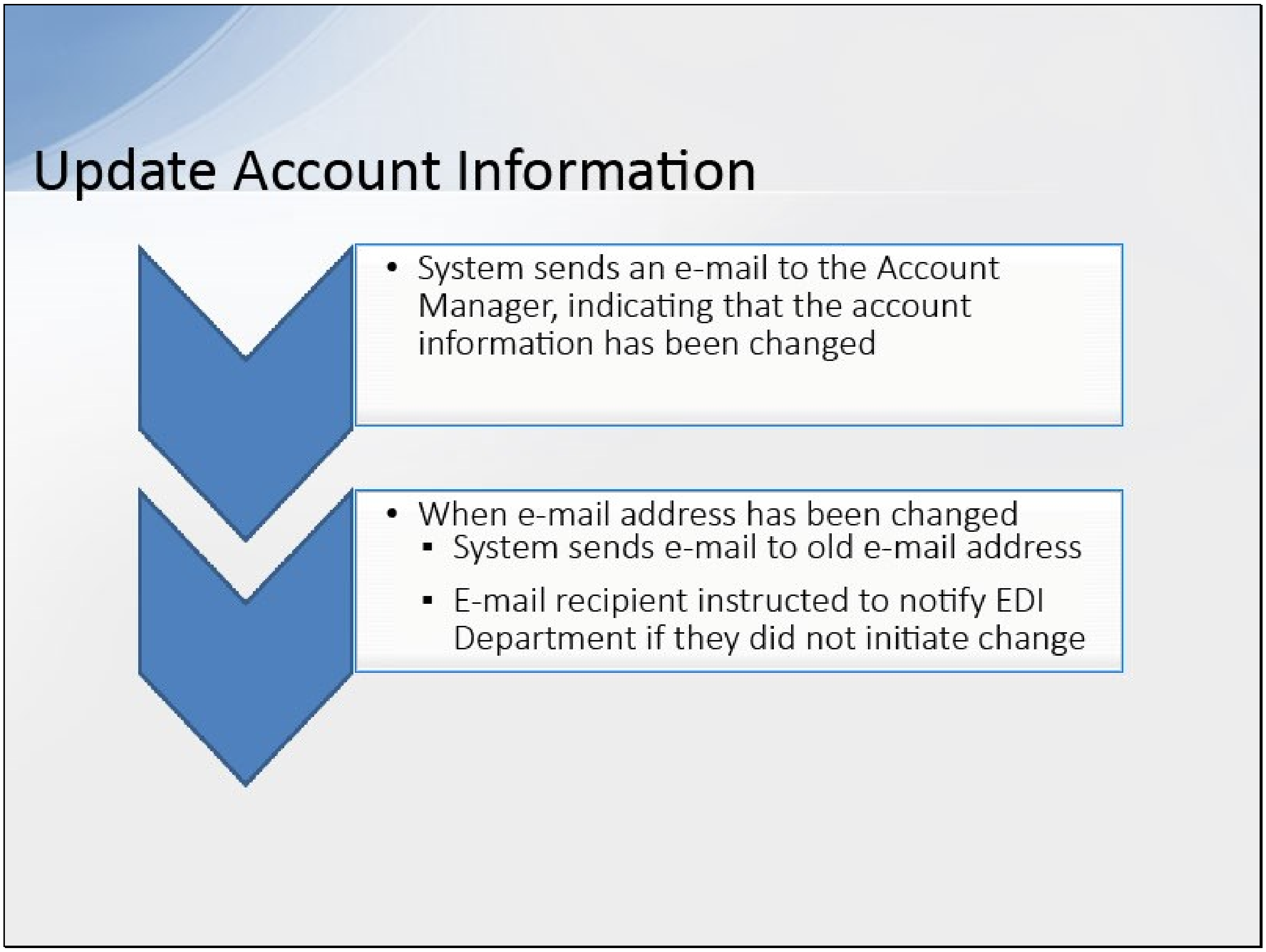

Slide notes

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.

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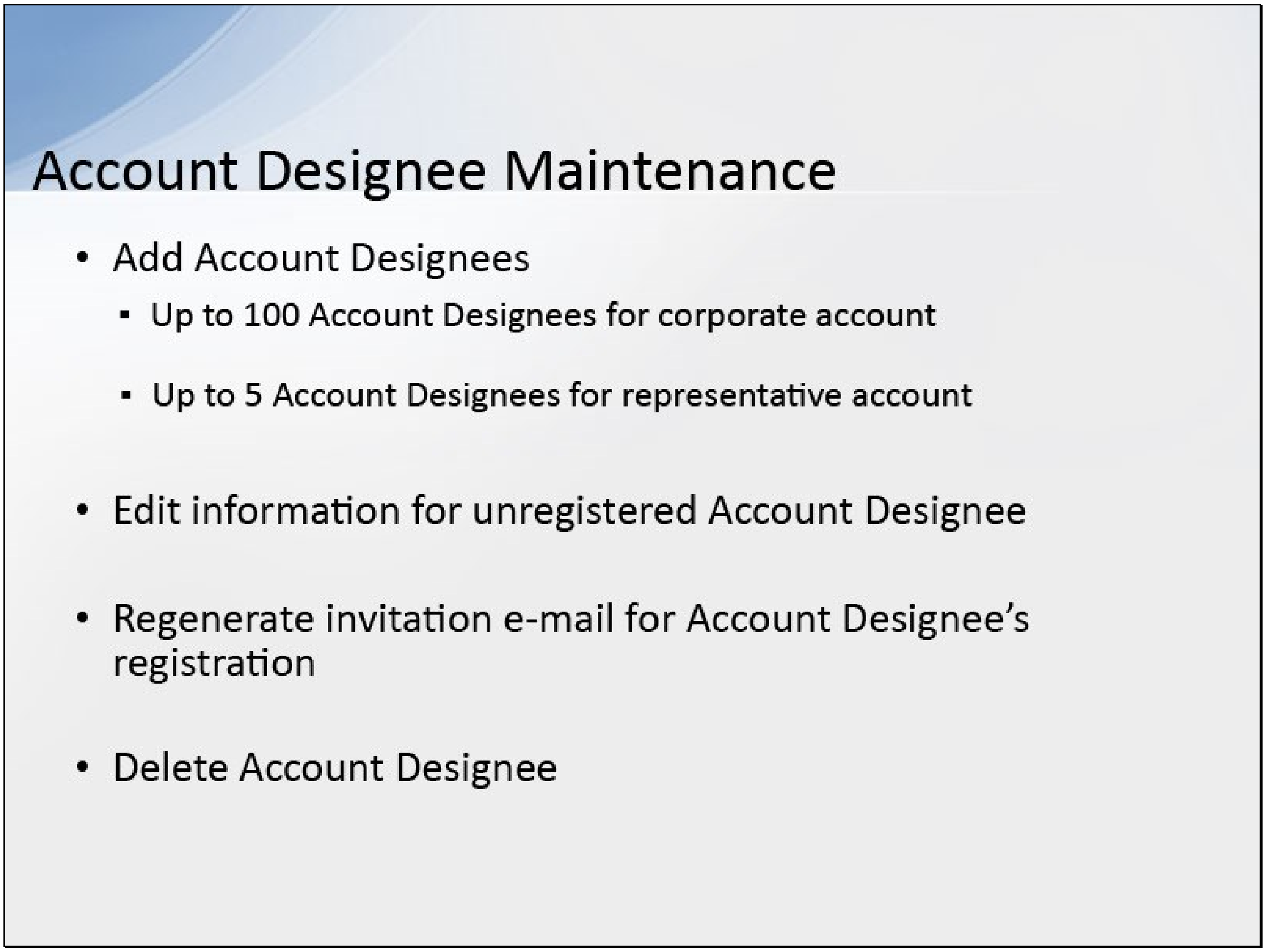

Slide notes

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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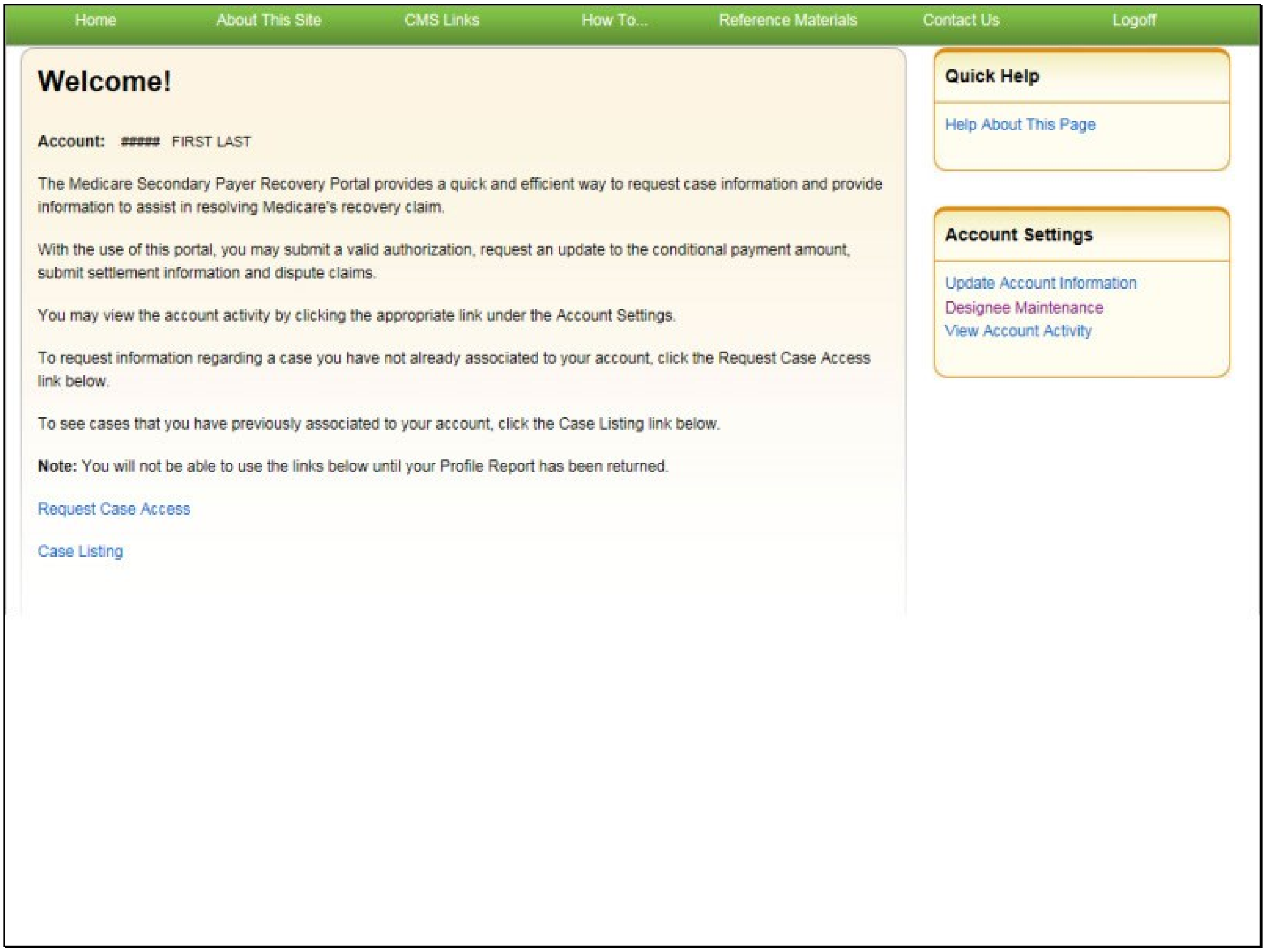

Slide notes

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

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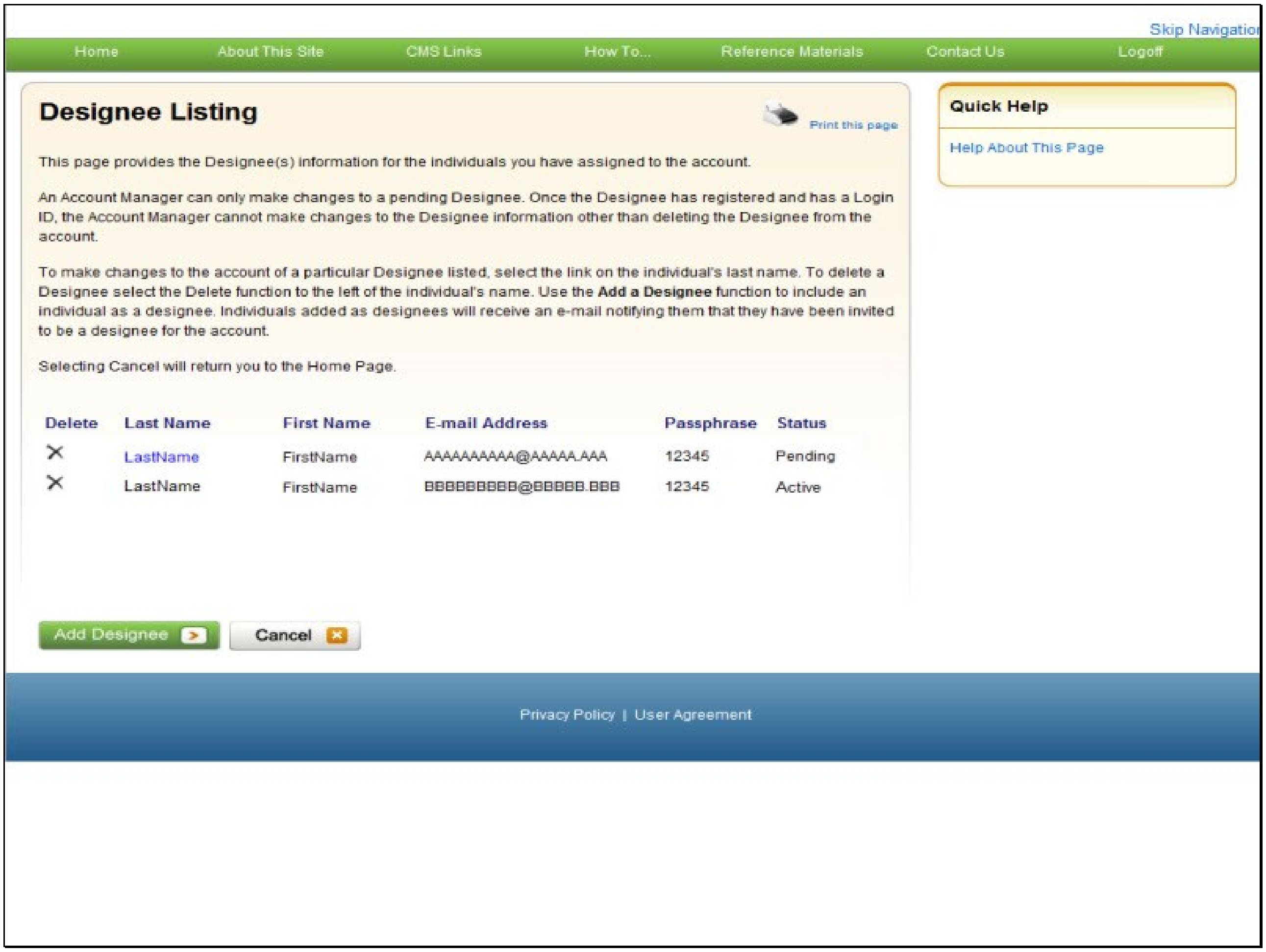

Slide notes

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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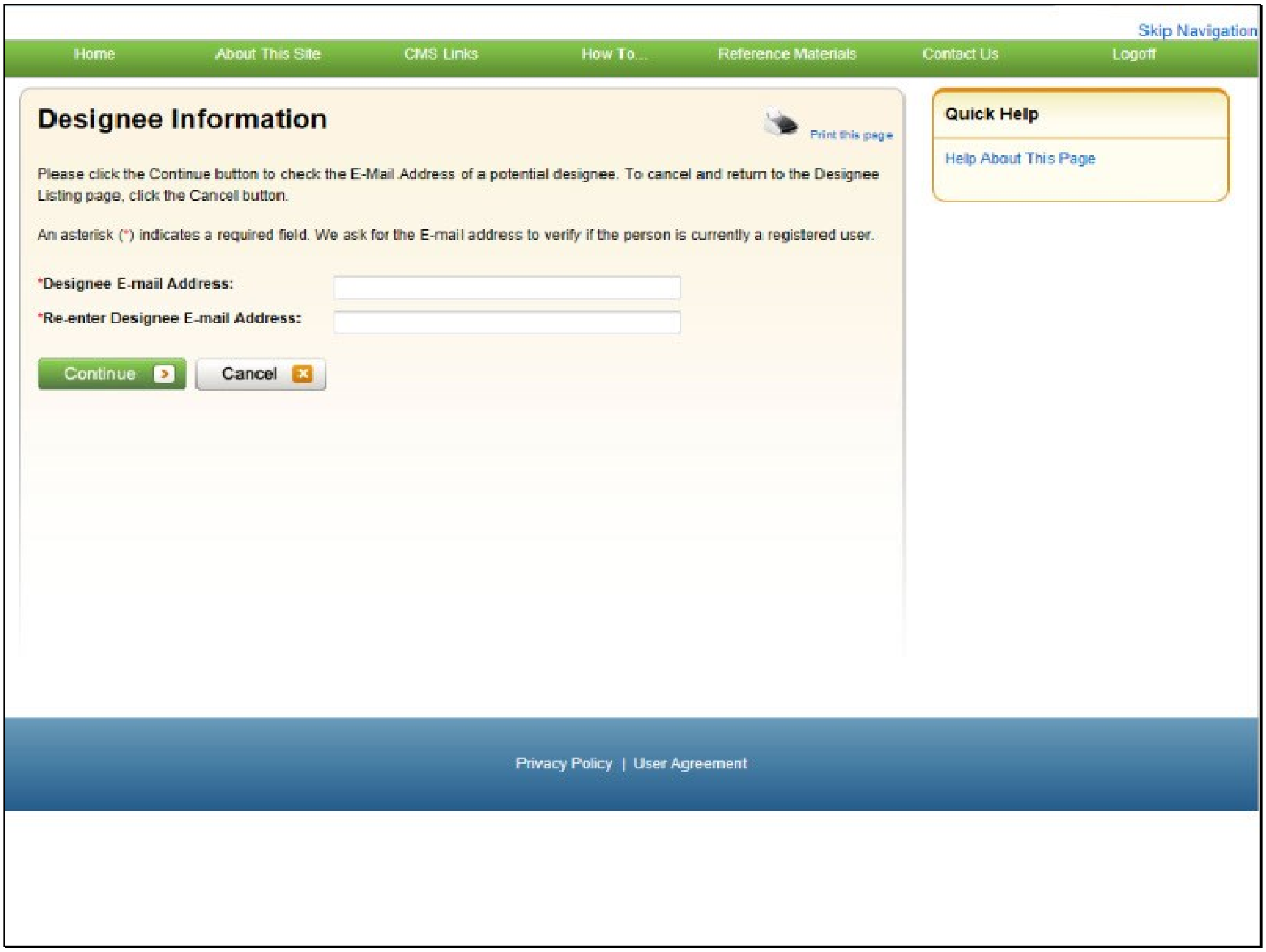

Slide notes

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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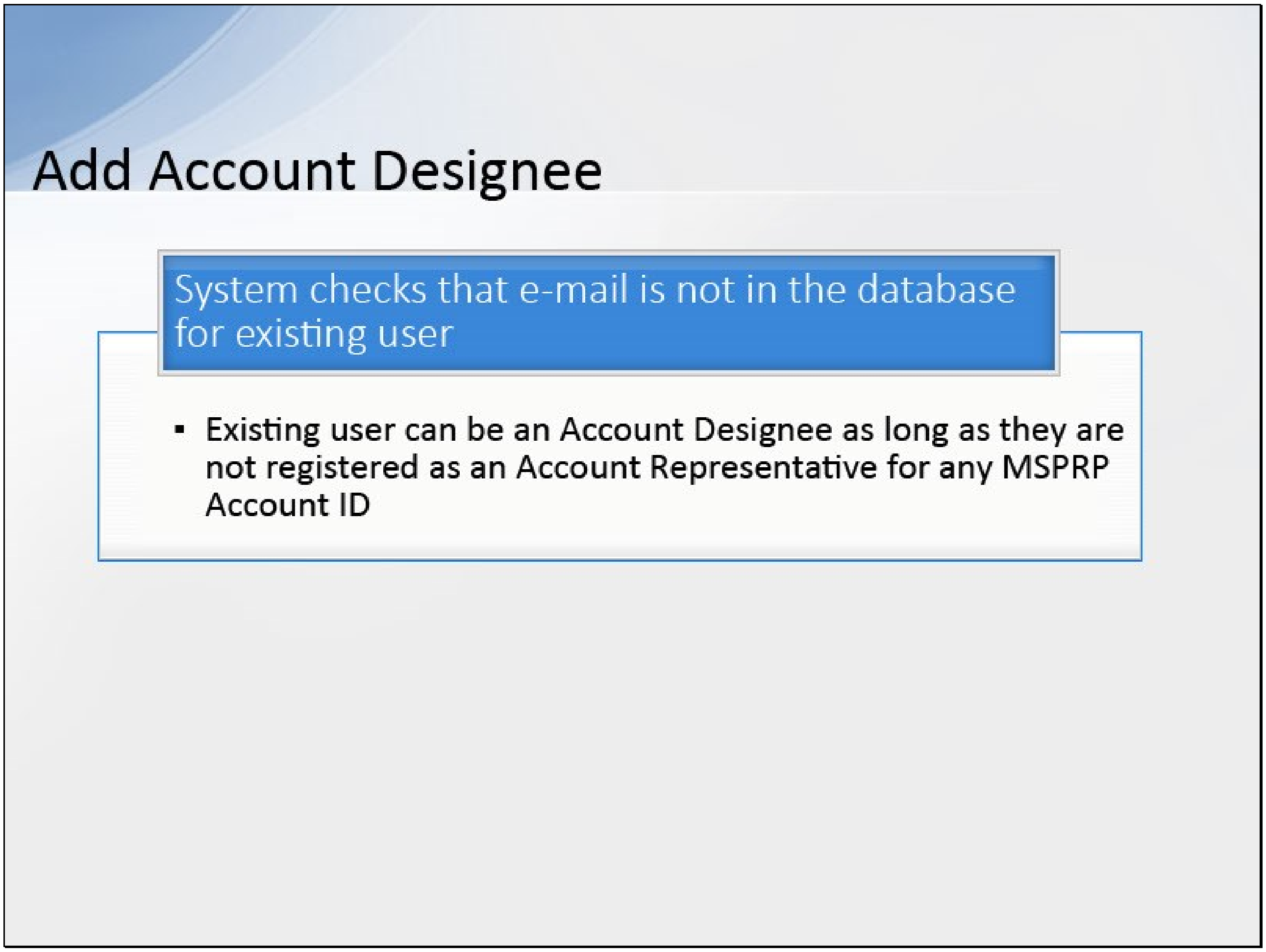

Slide notes

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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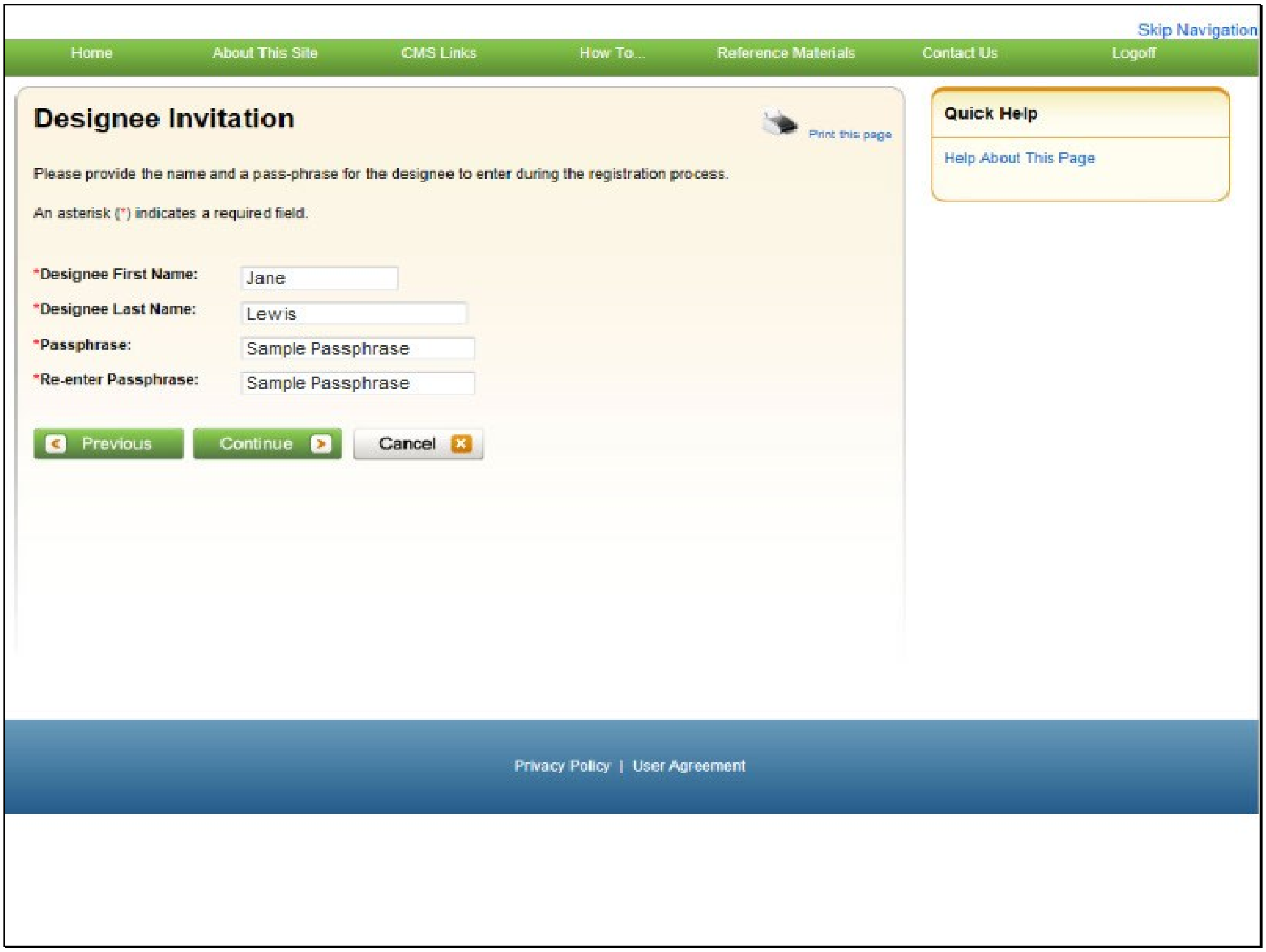

Slide notes

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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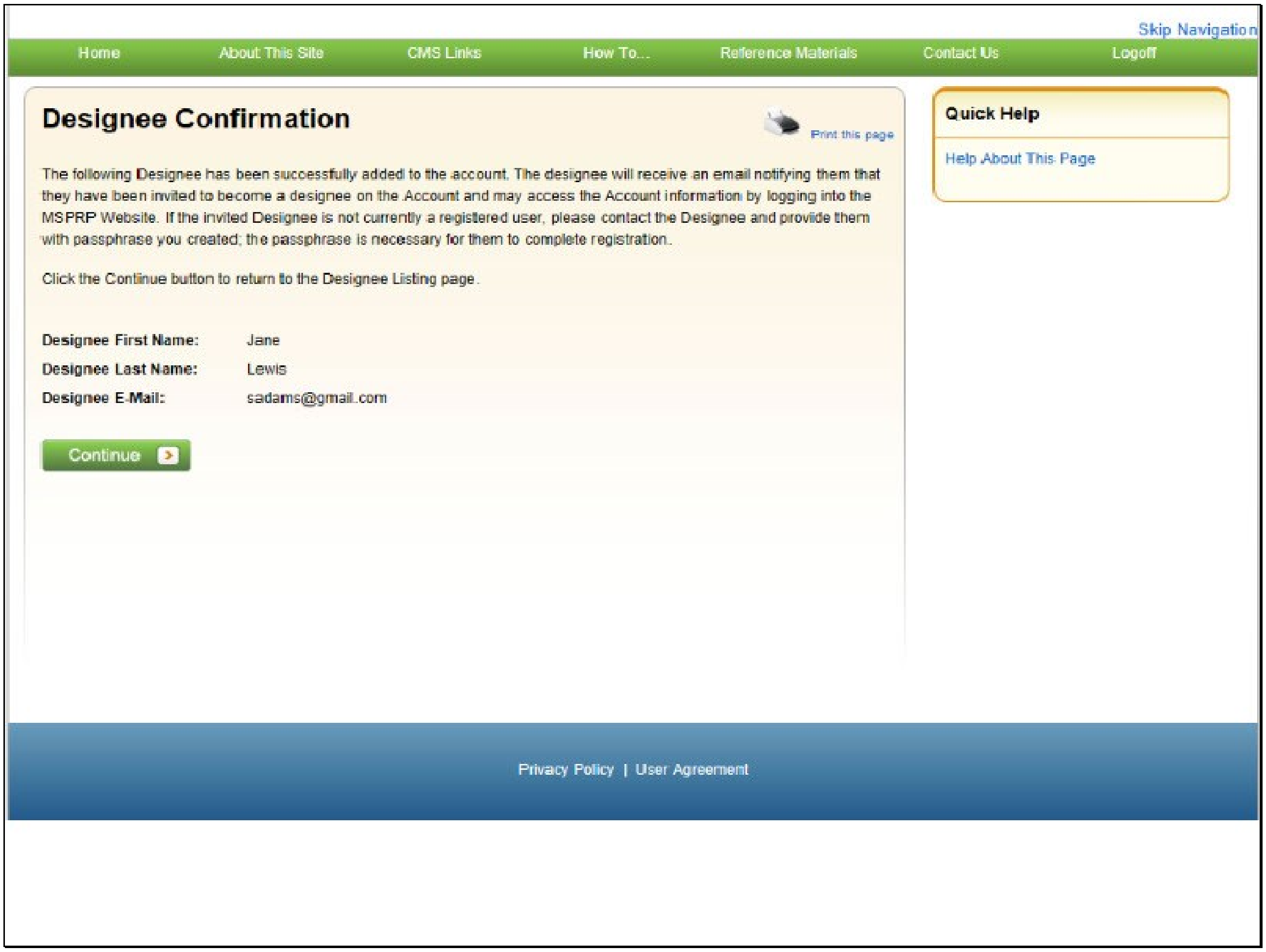

Slide notes

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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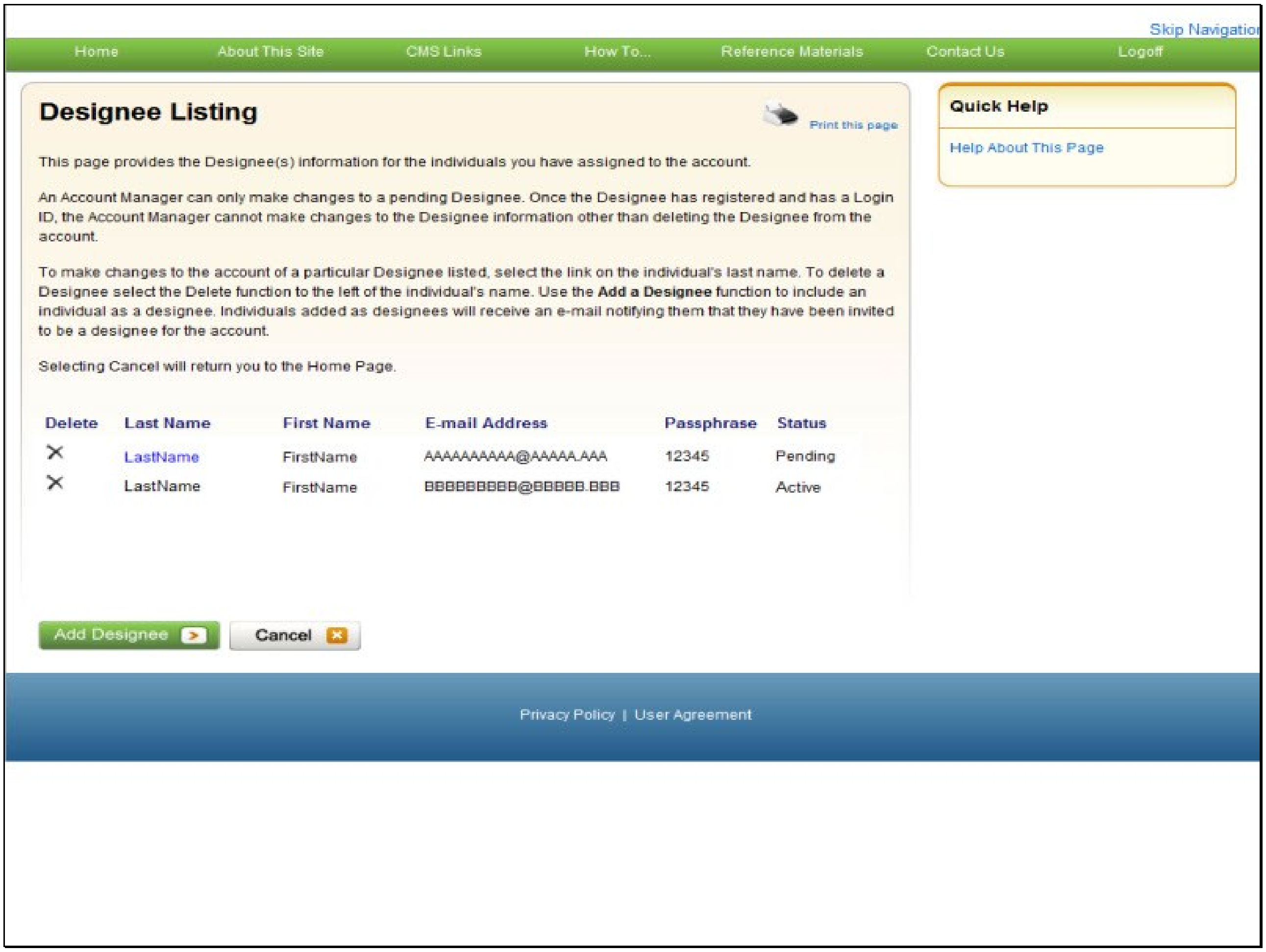

Slide notes

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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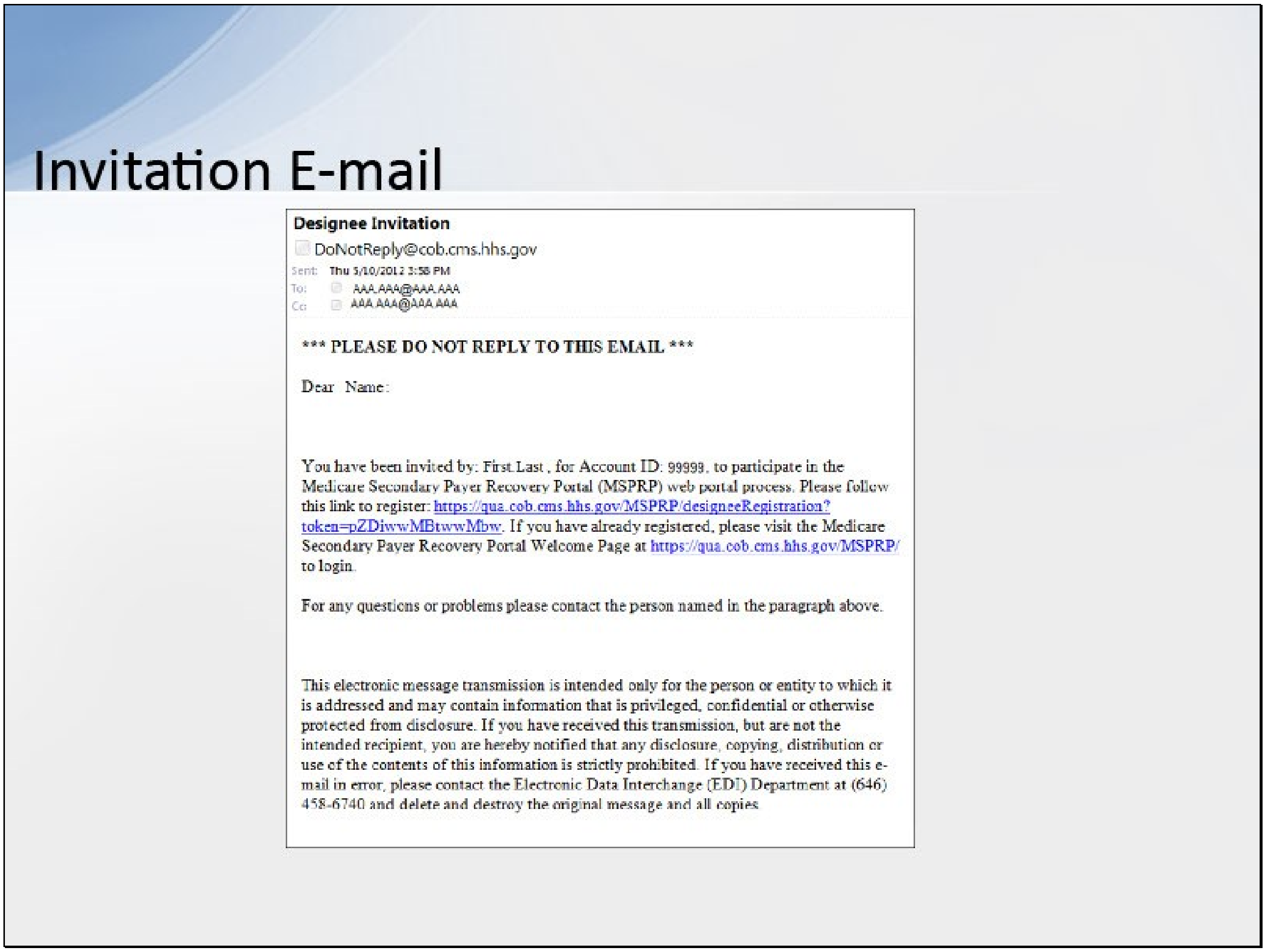

Slide notes

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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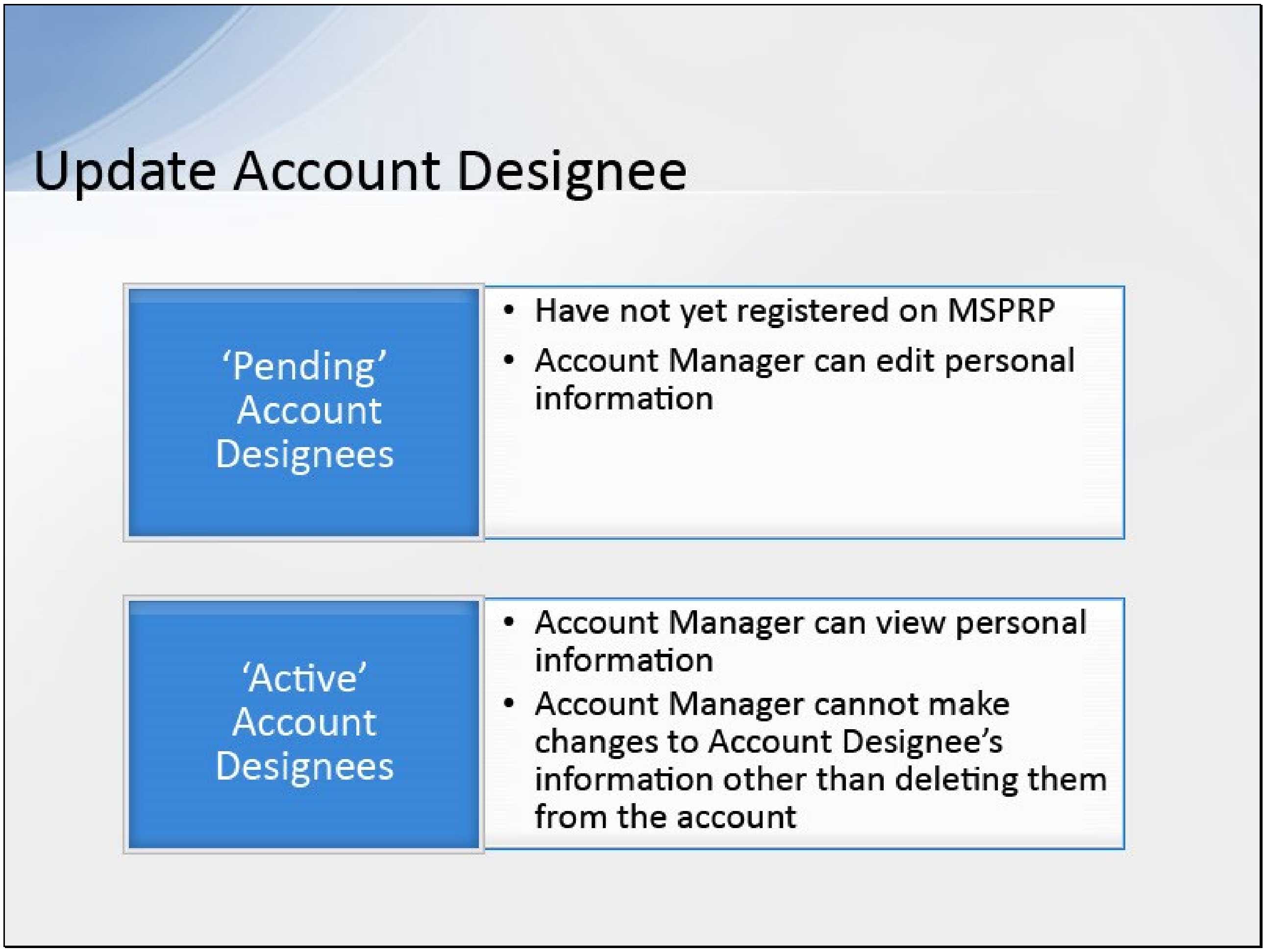

Slide notes

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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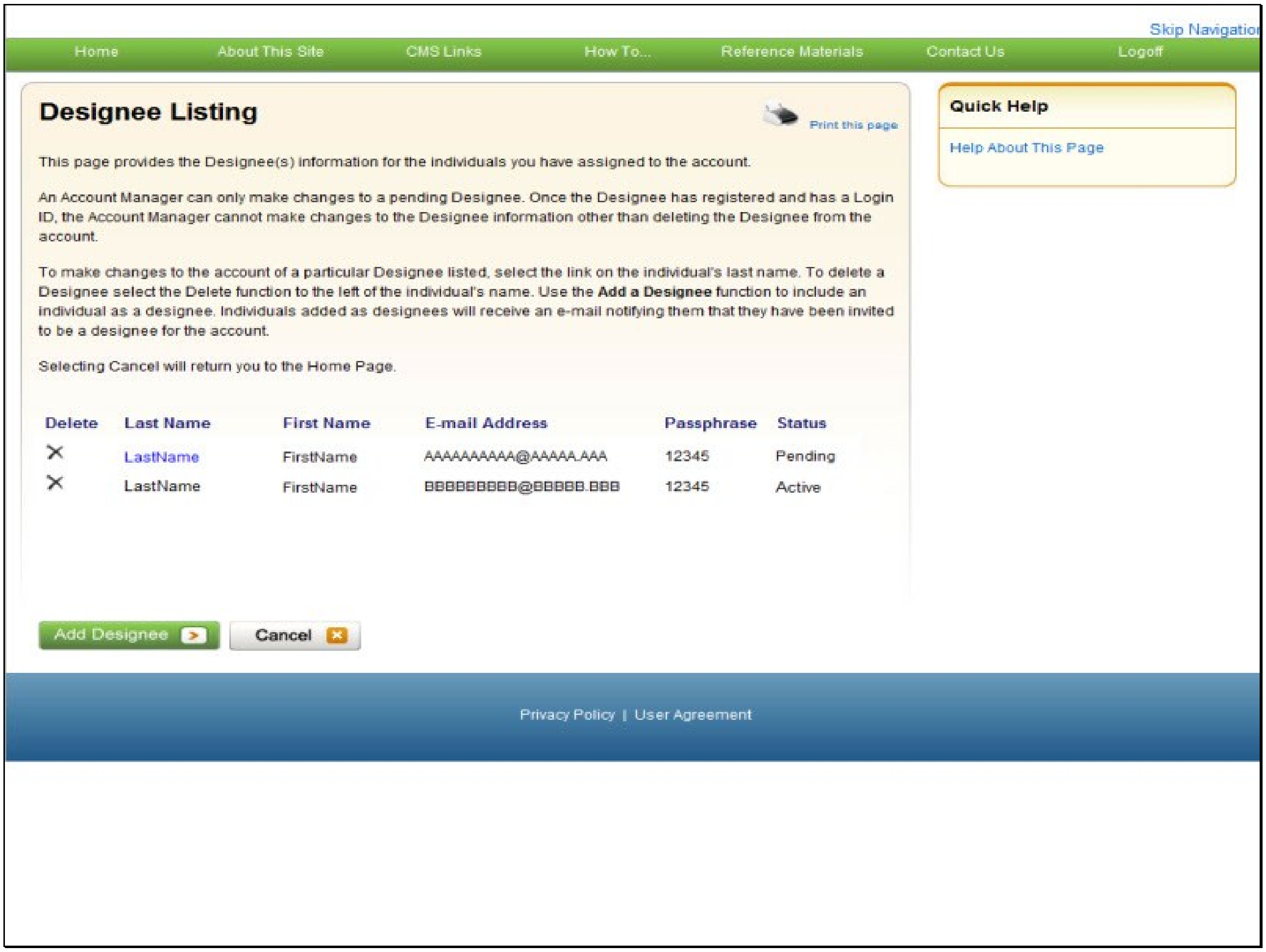

Slide notes

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.

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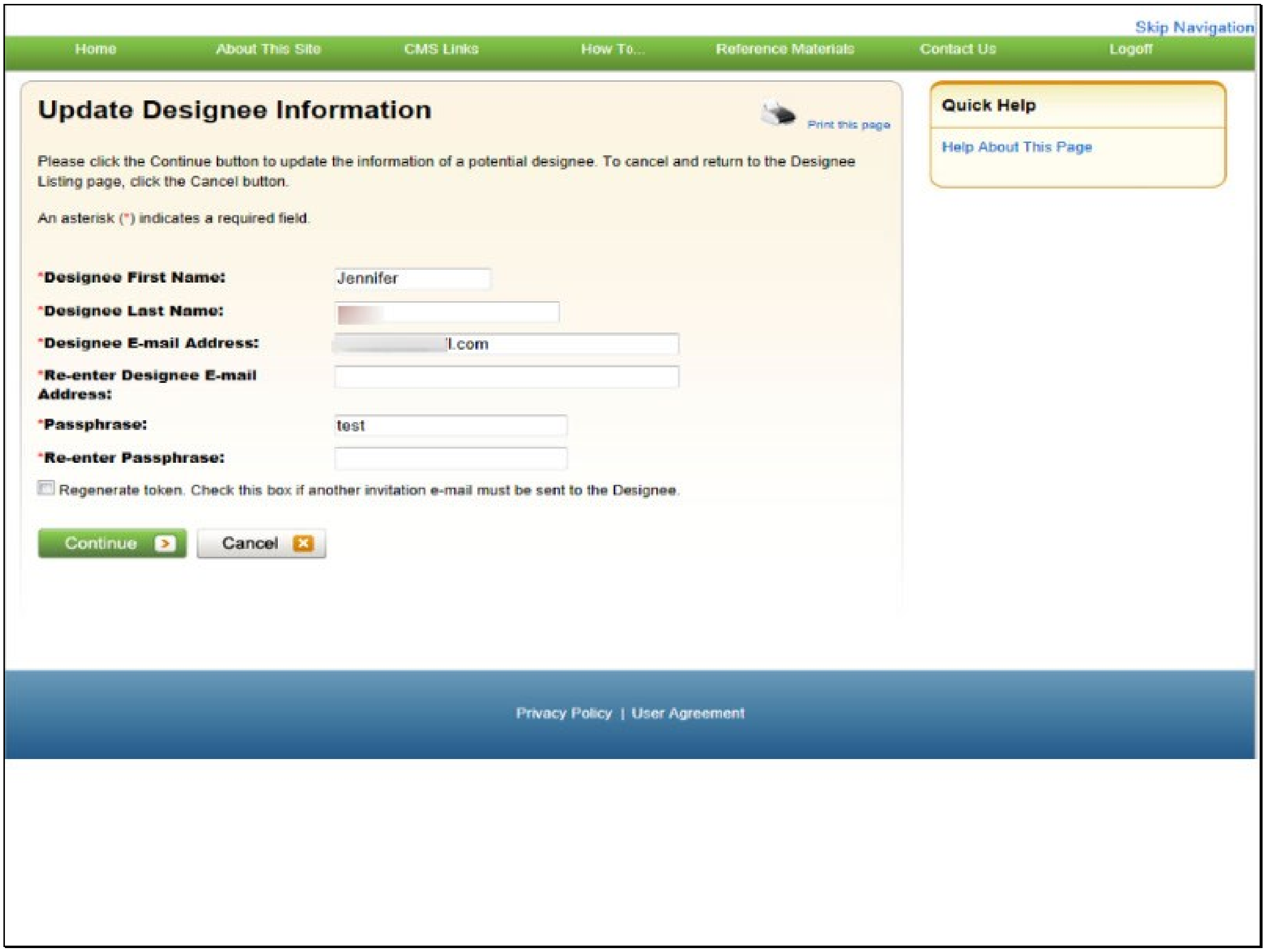

Slide notes

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].

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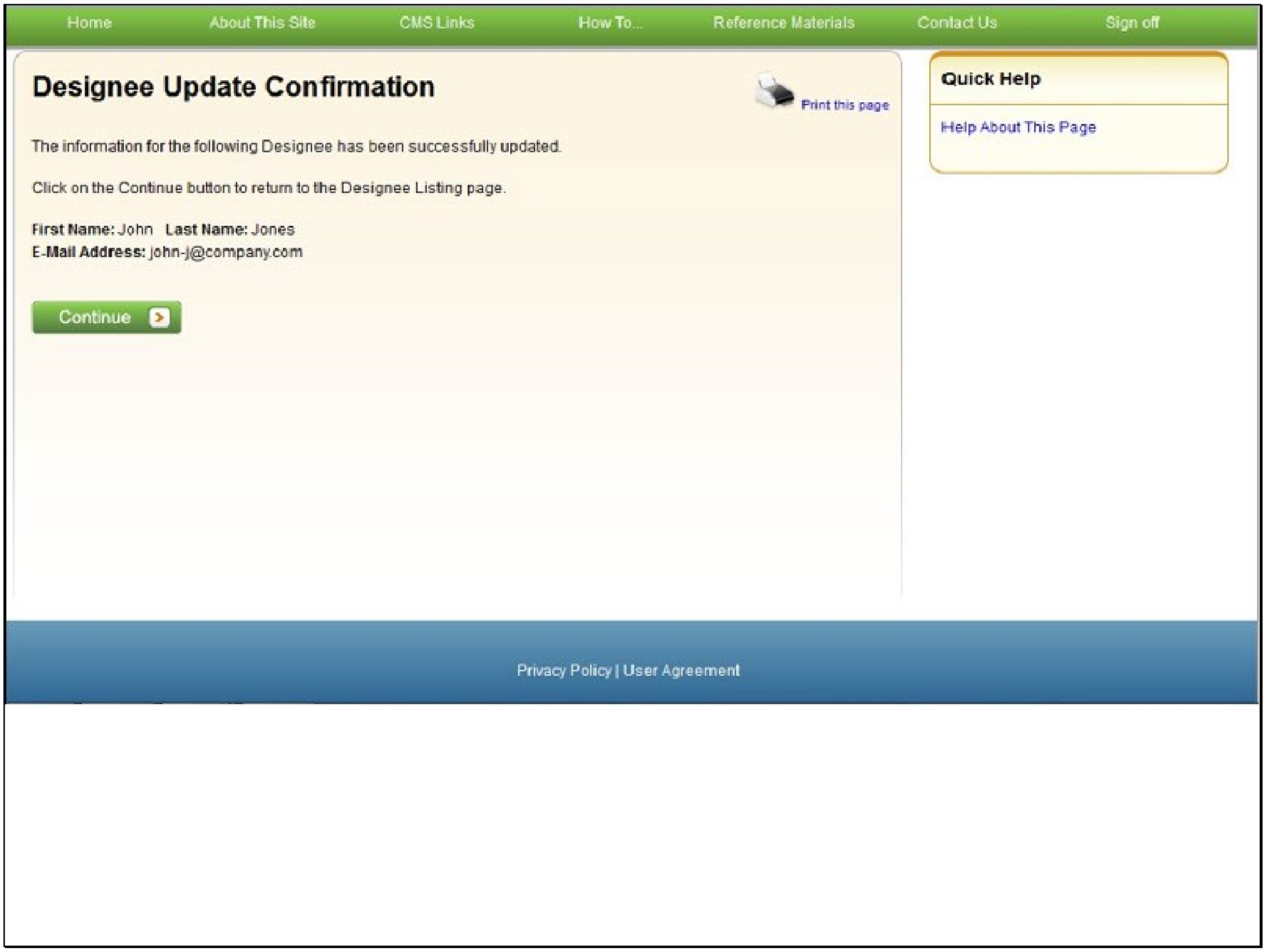
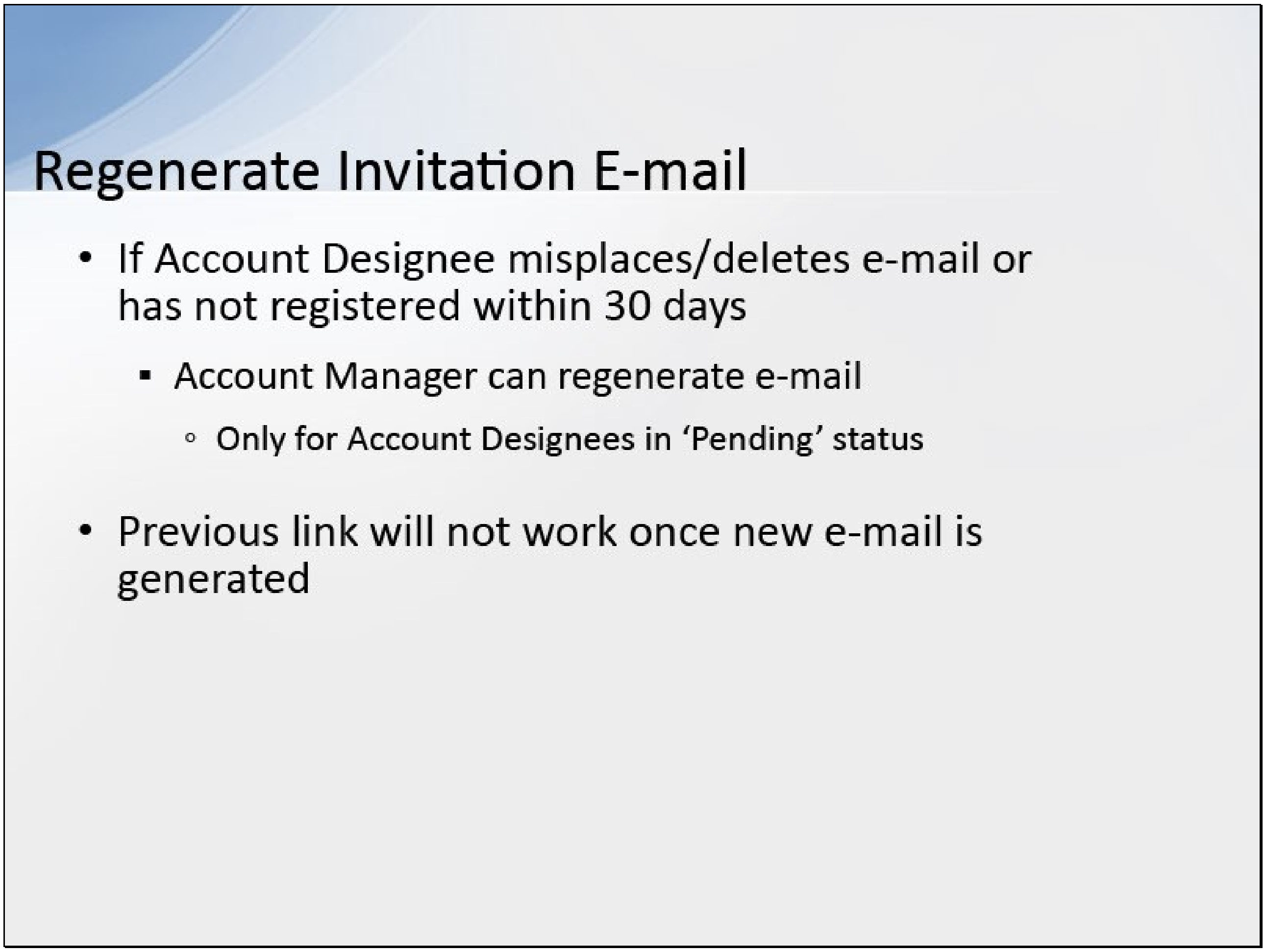


Slide notes

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

Slide 27 - of 41



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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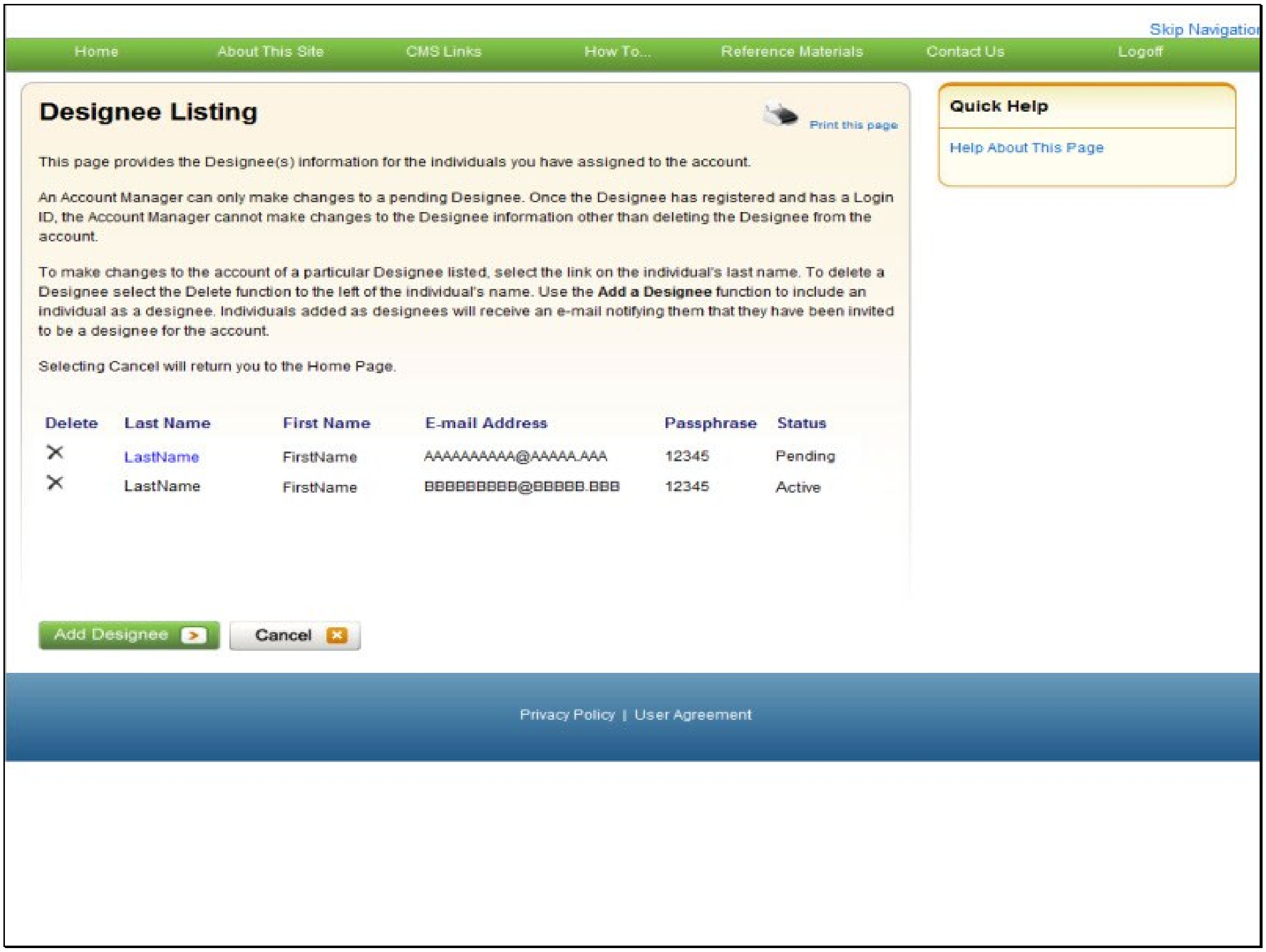

Slide notes

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

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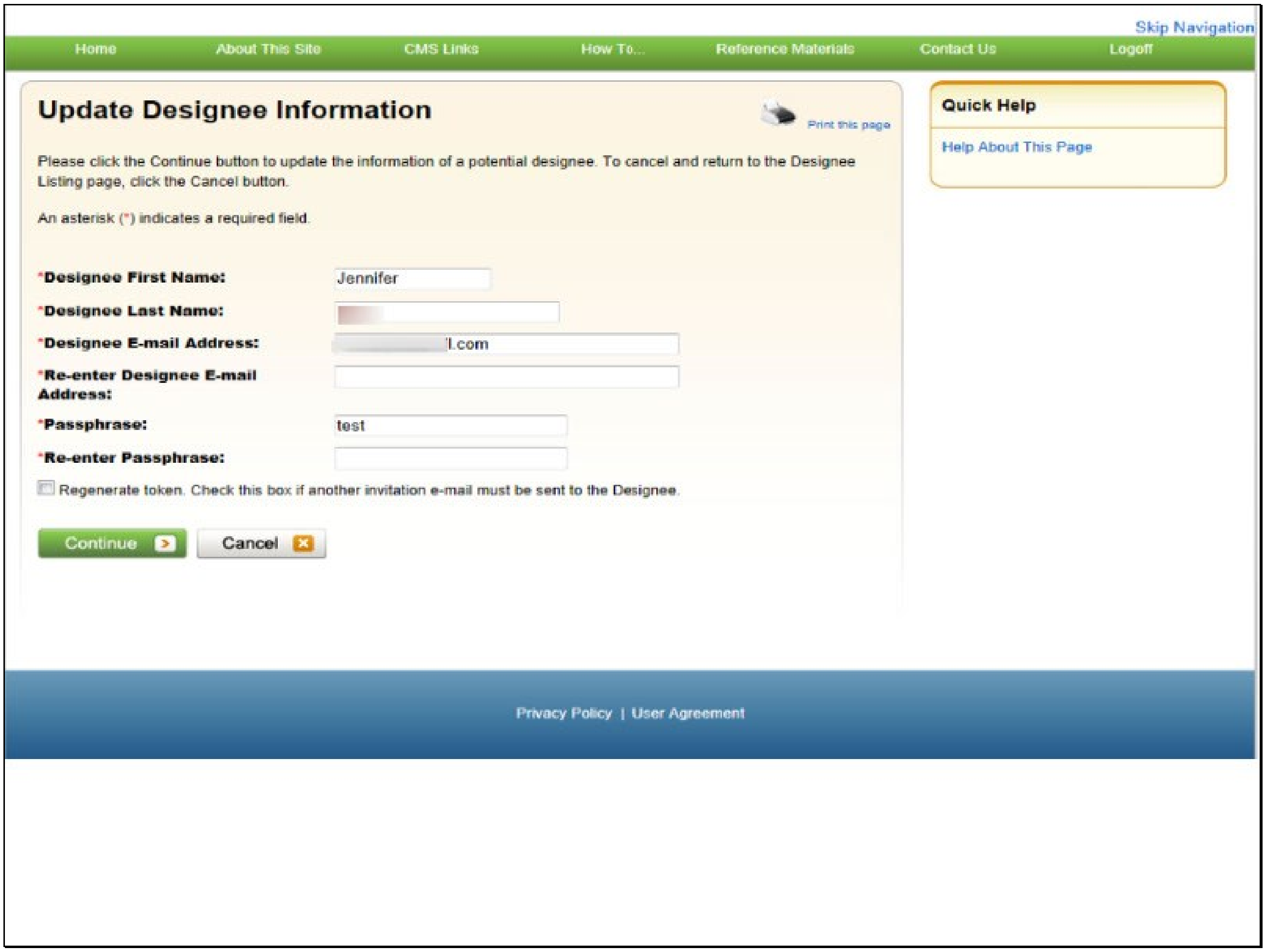

Slide notes

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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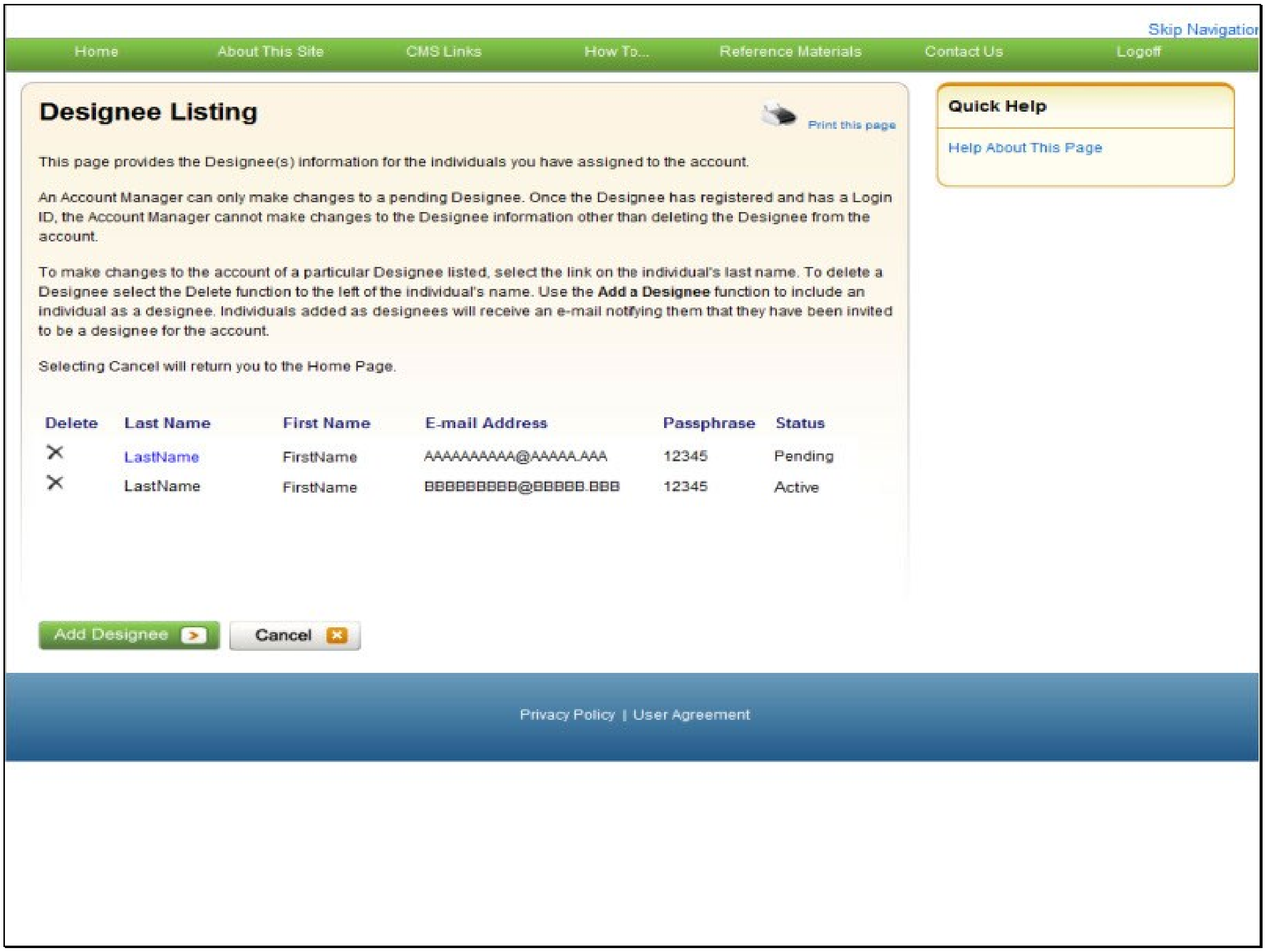

Slide notes

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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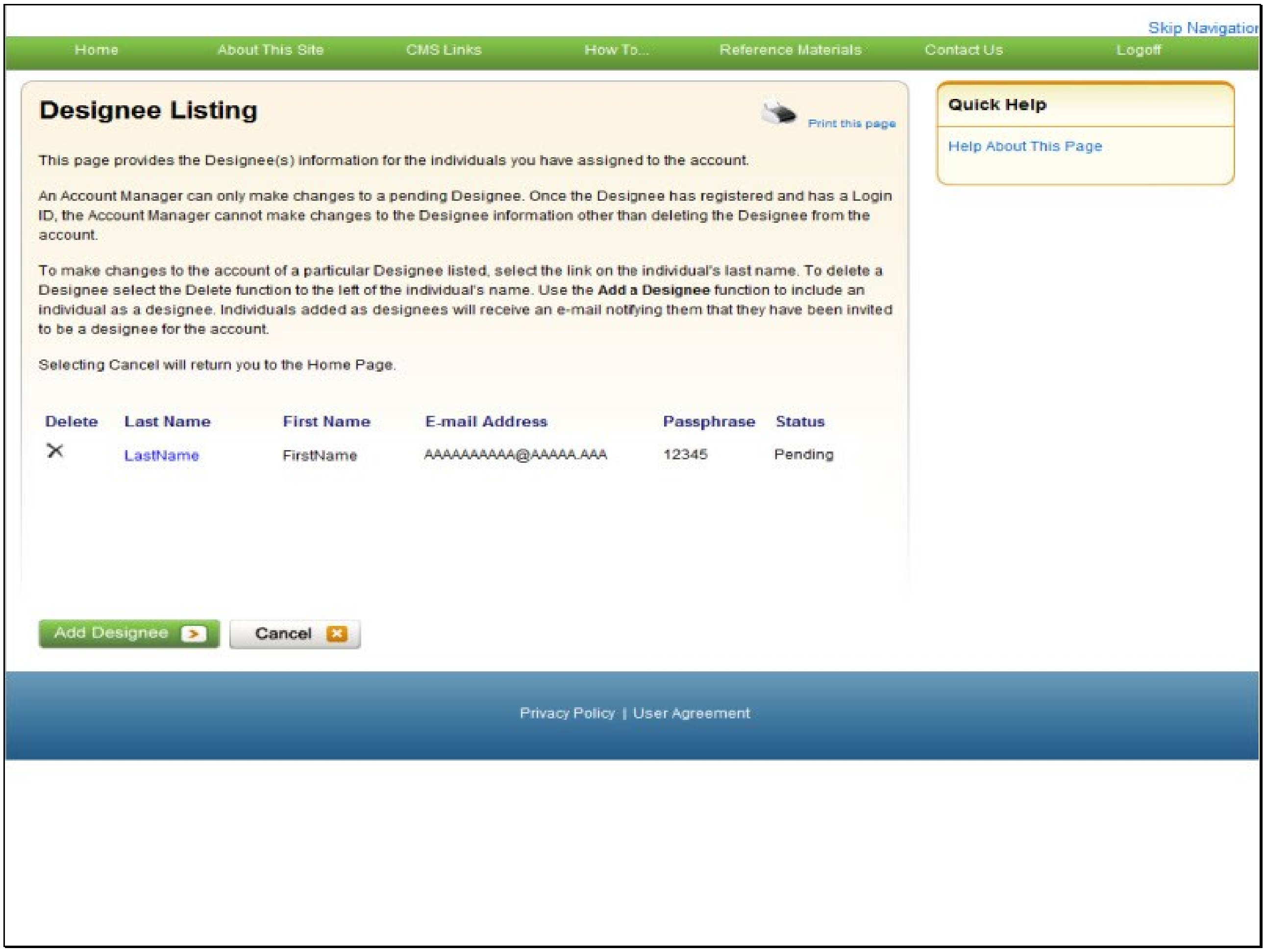

Slide notes

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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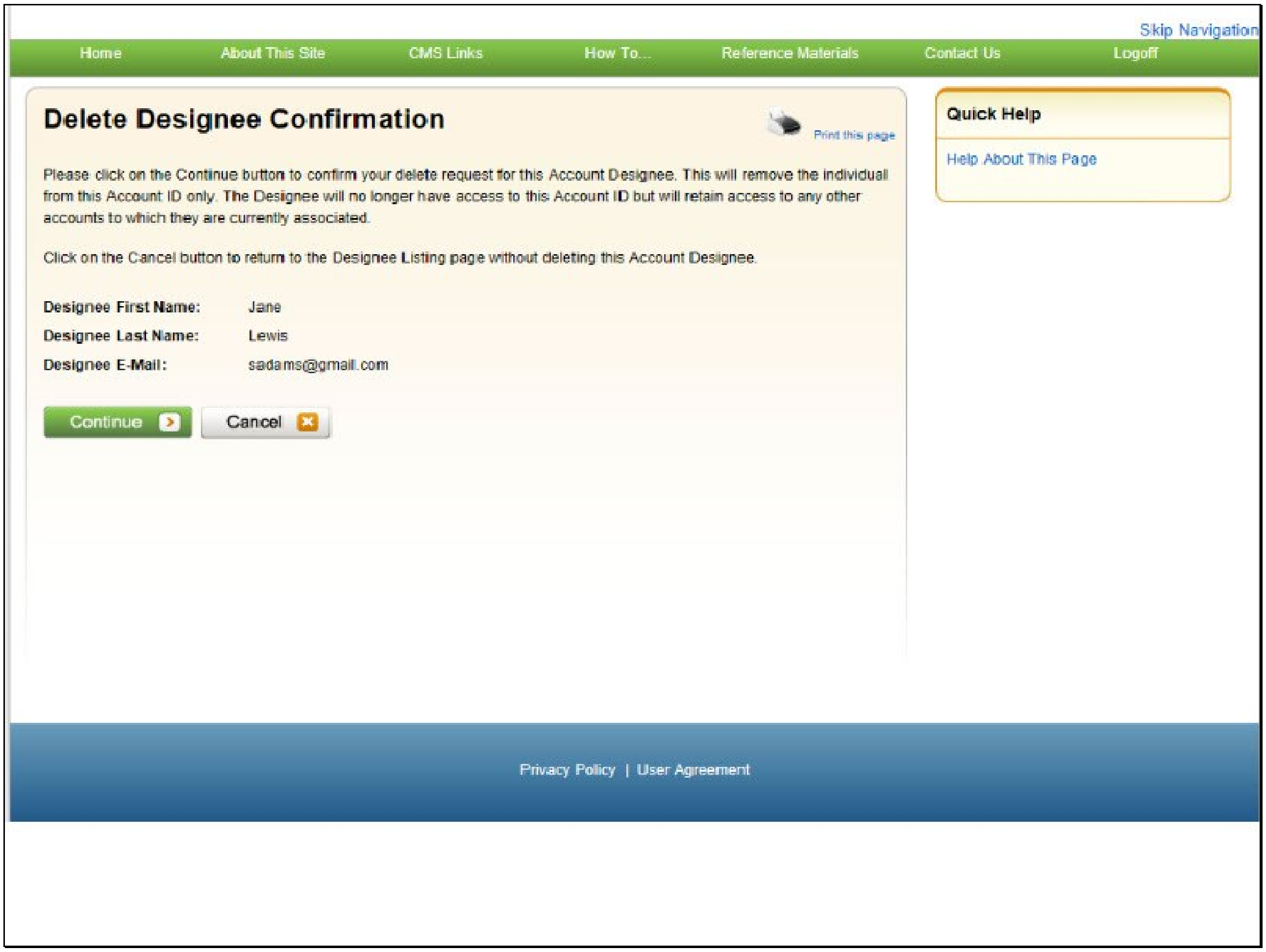

Slide notes

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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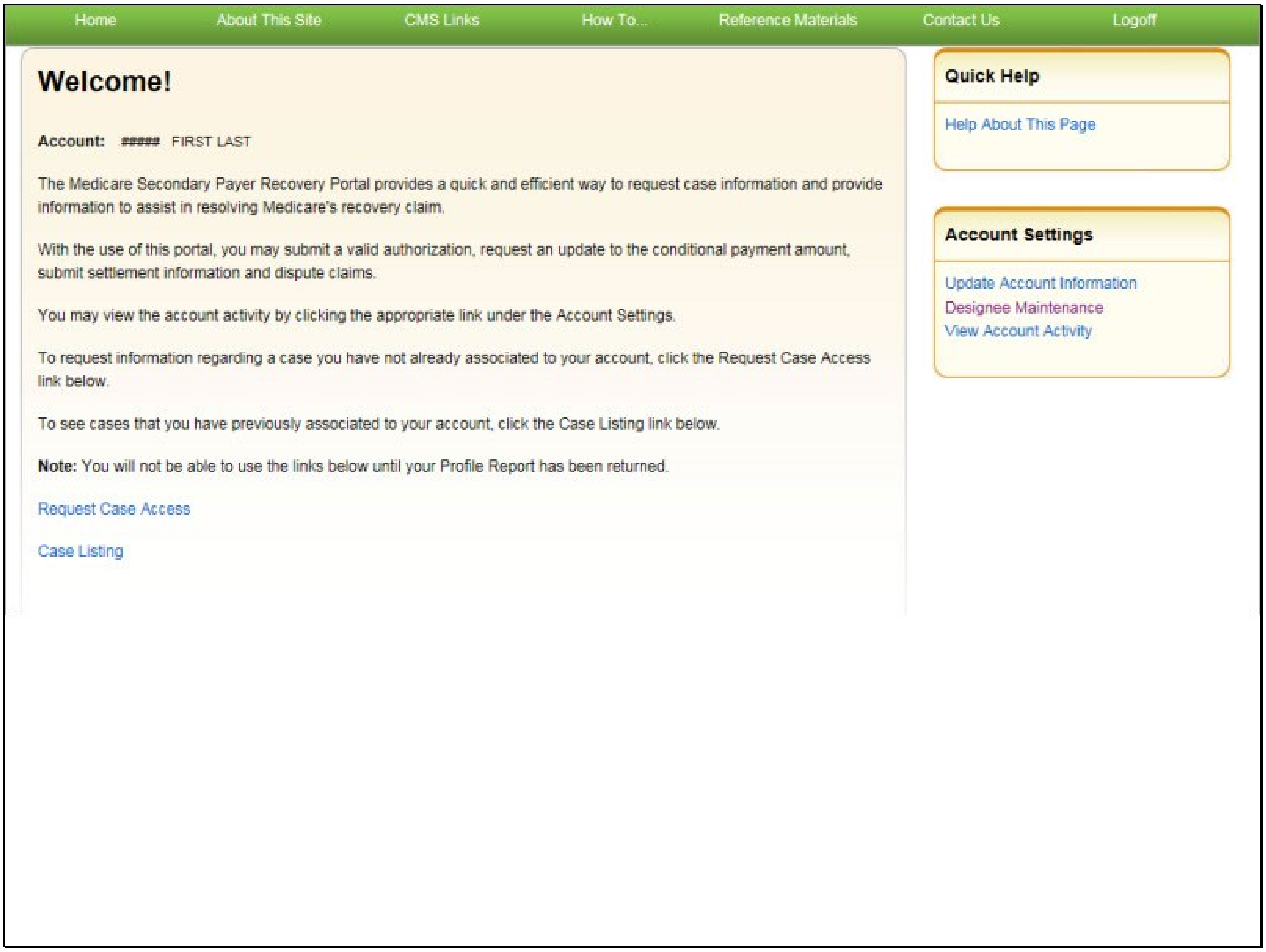

Slide notes

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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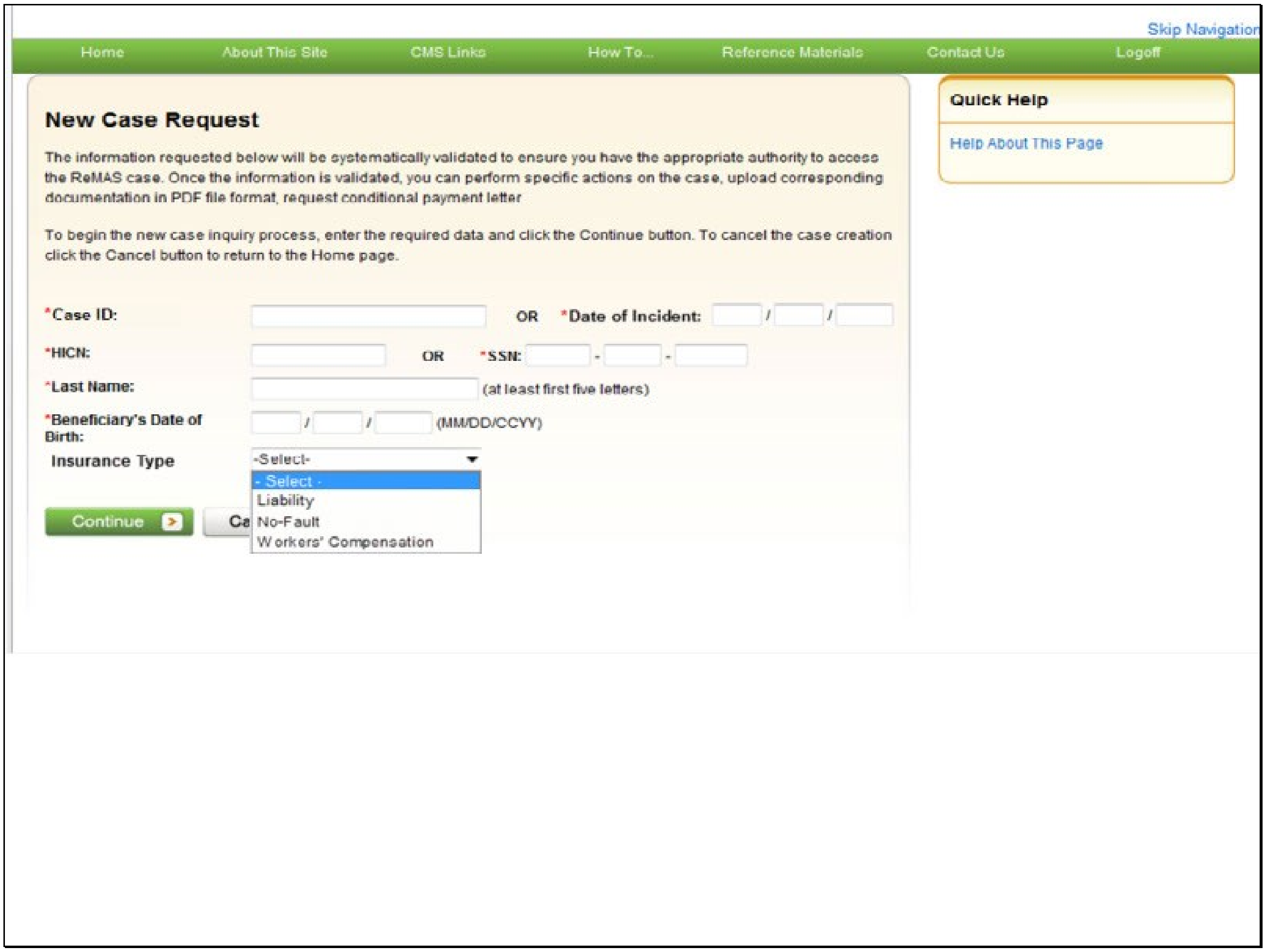

Slide notes

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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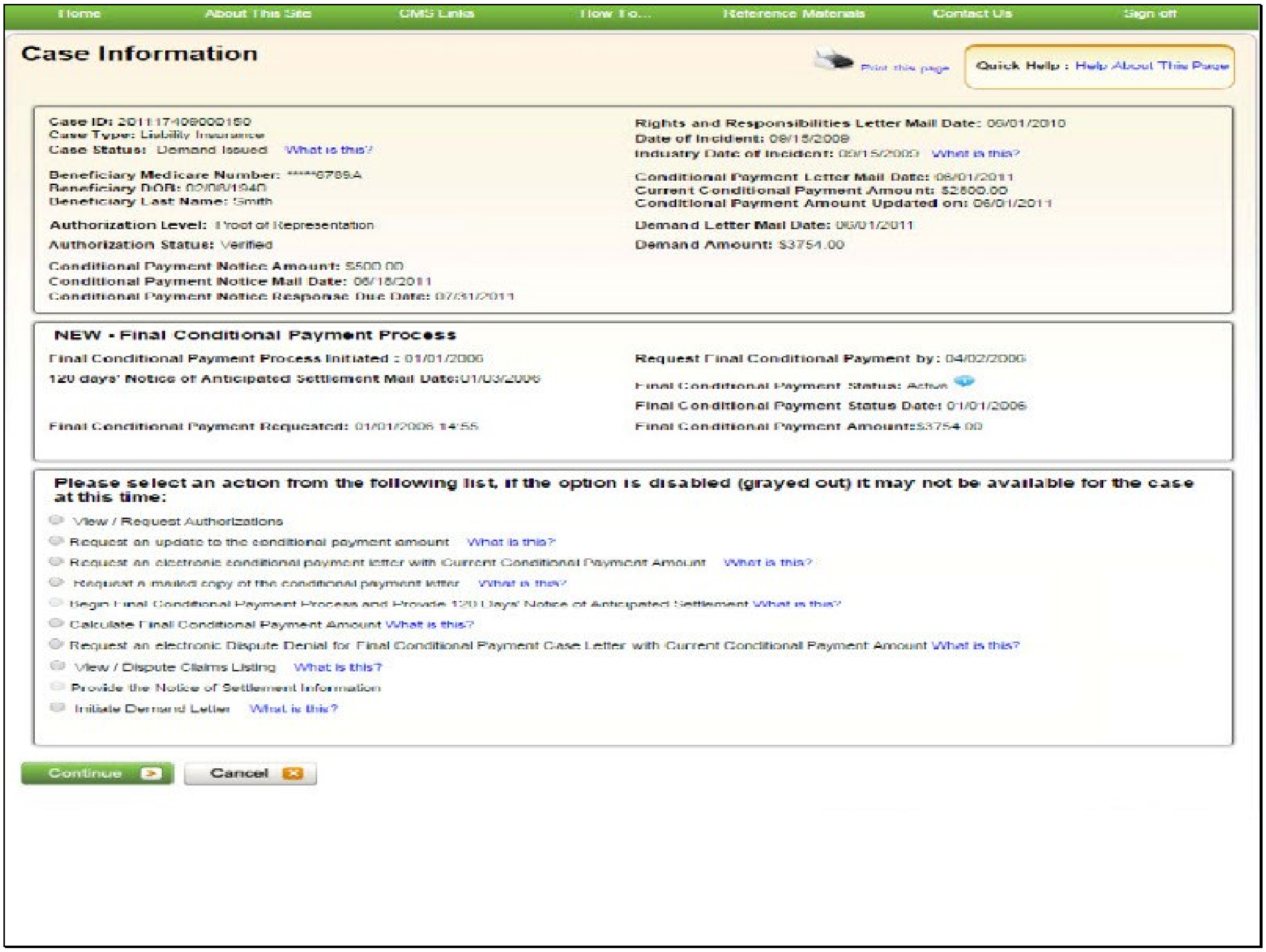

Slide notes

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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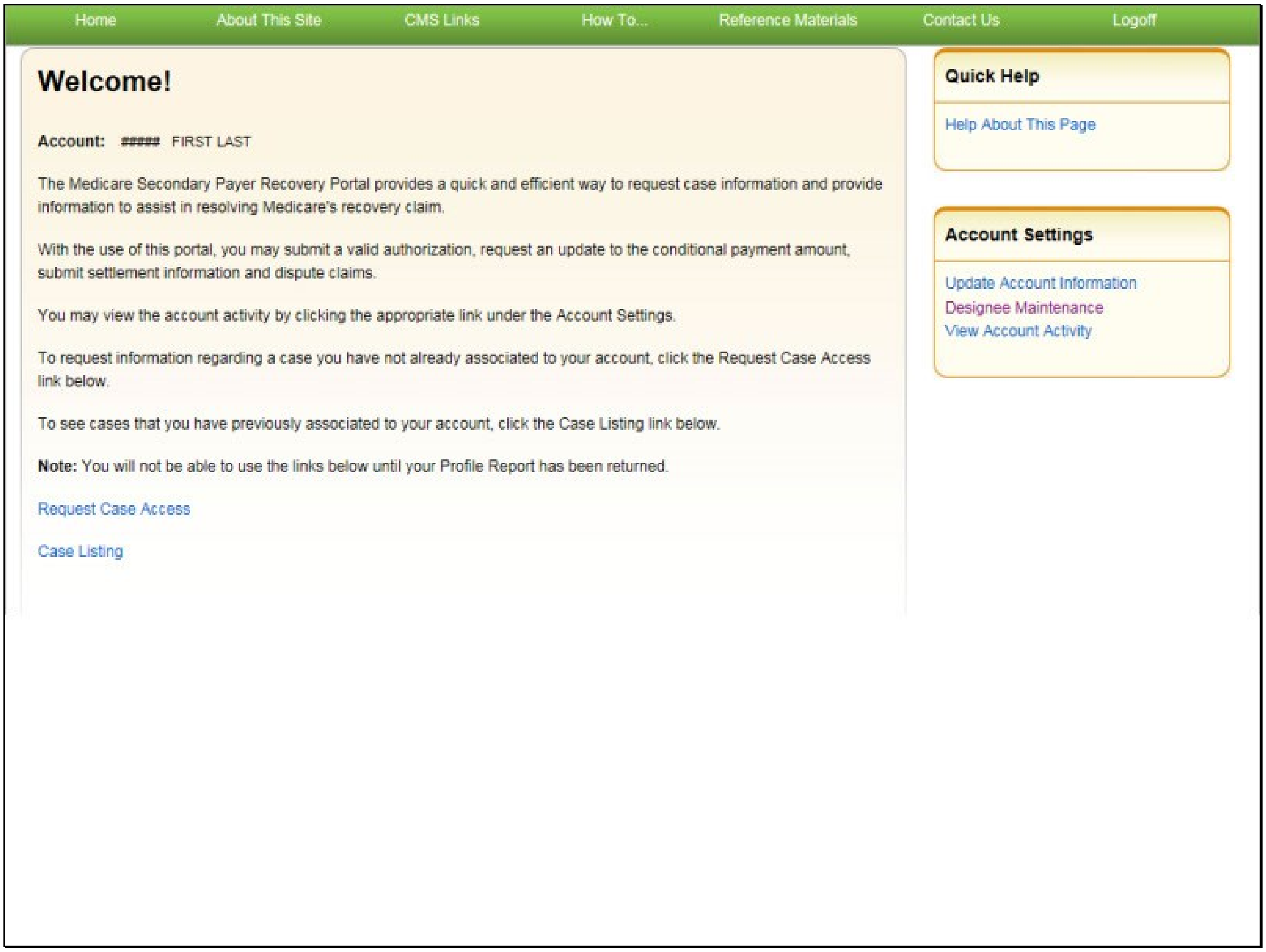

Slide notes

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

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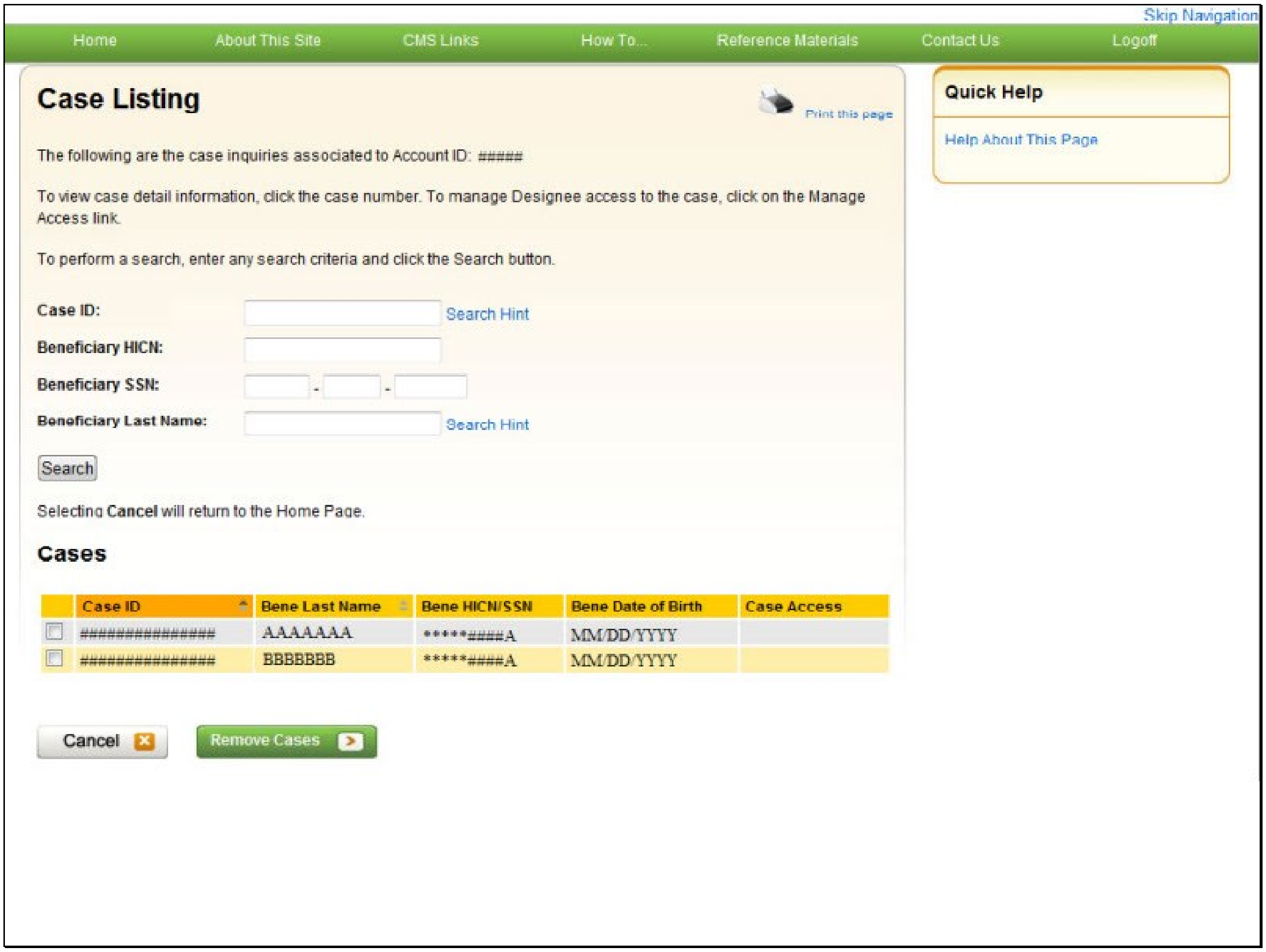

Slide notes

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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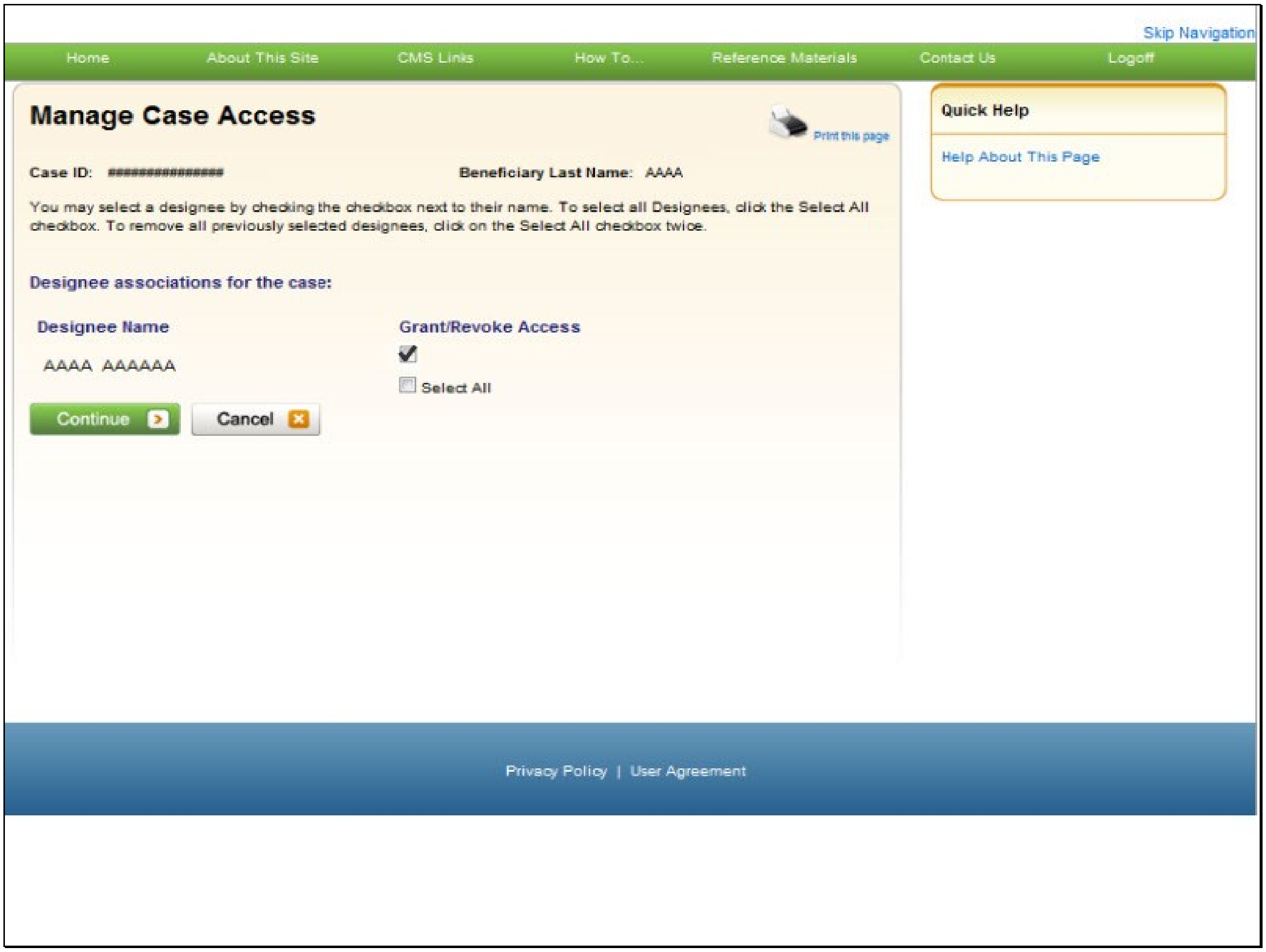

Slide notes

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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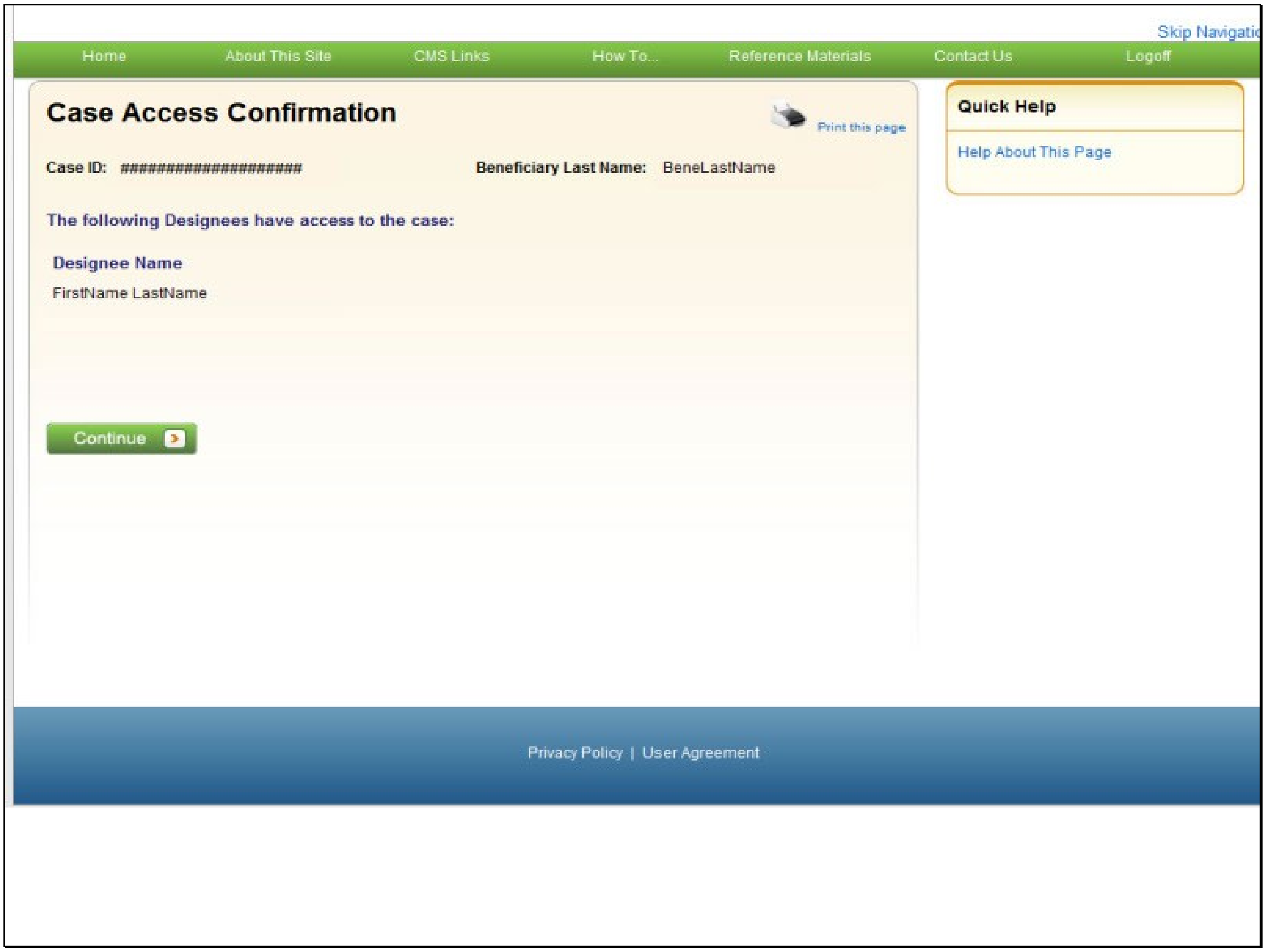

Slide notes

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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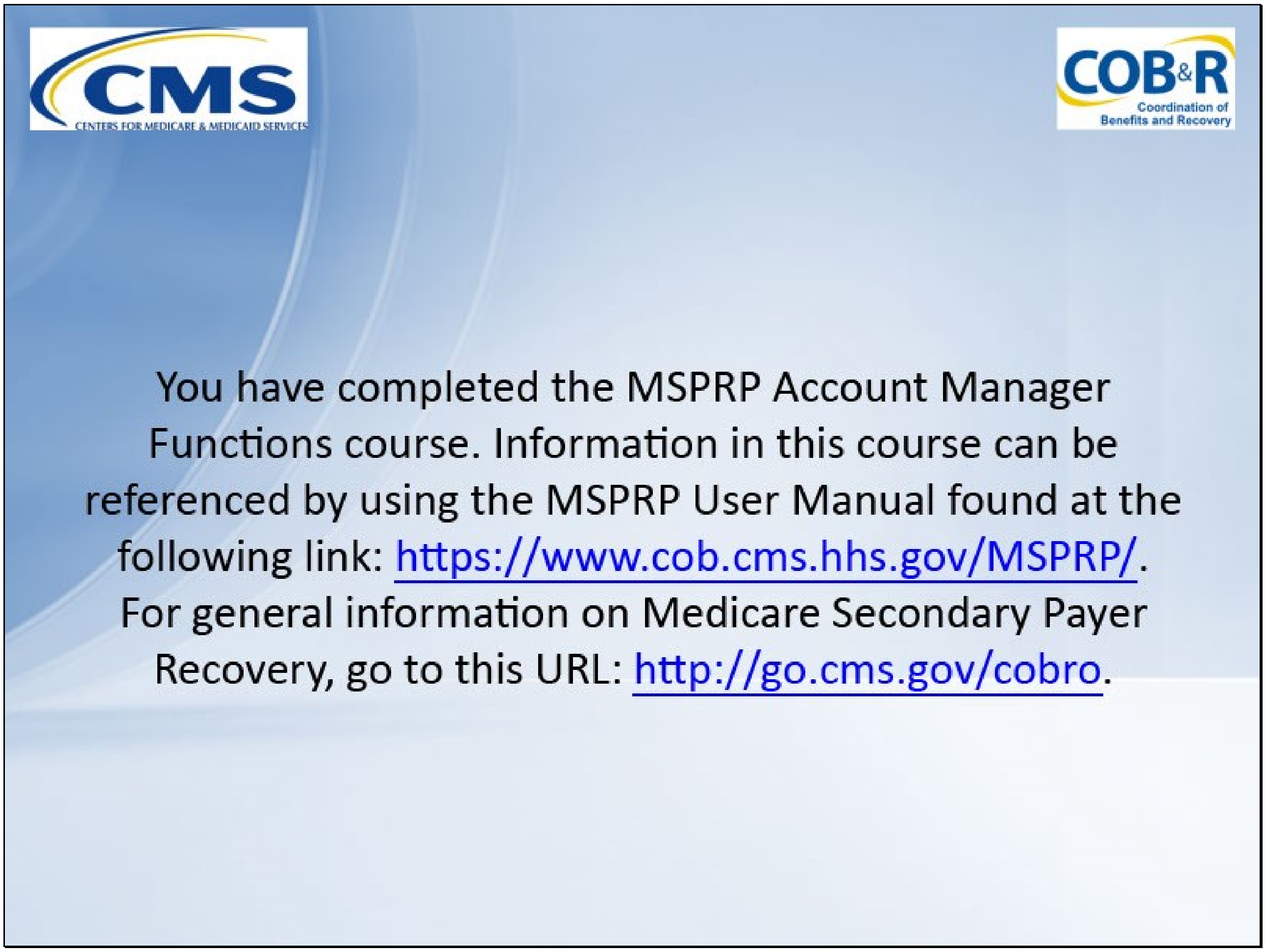

Slide notes

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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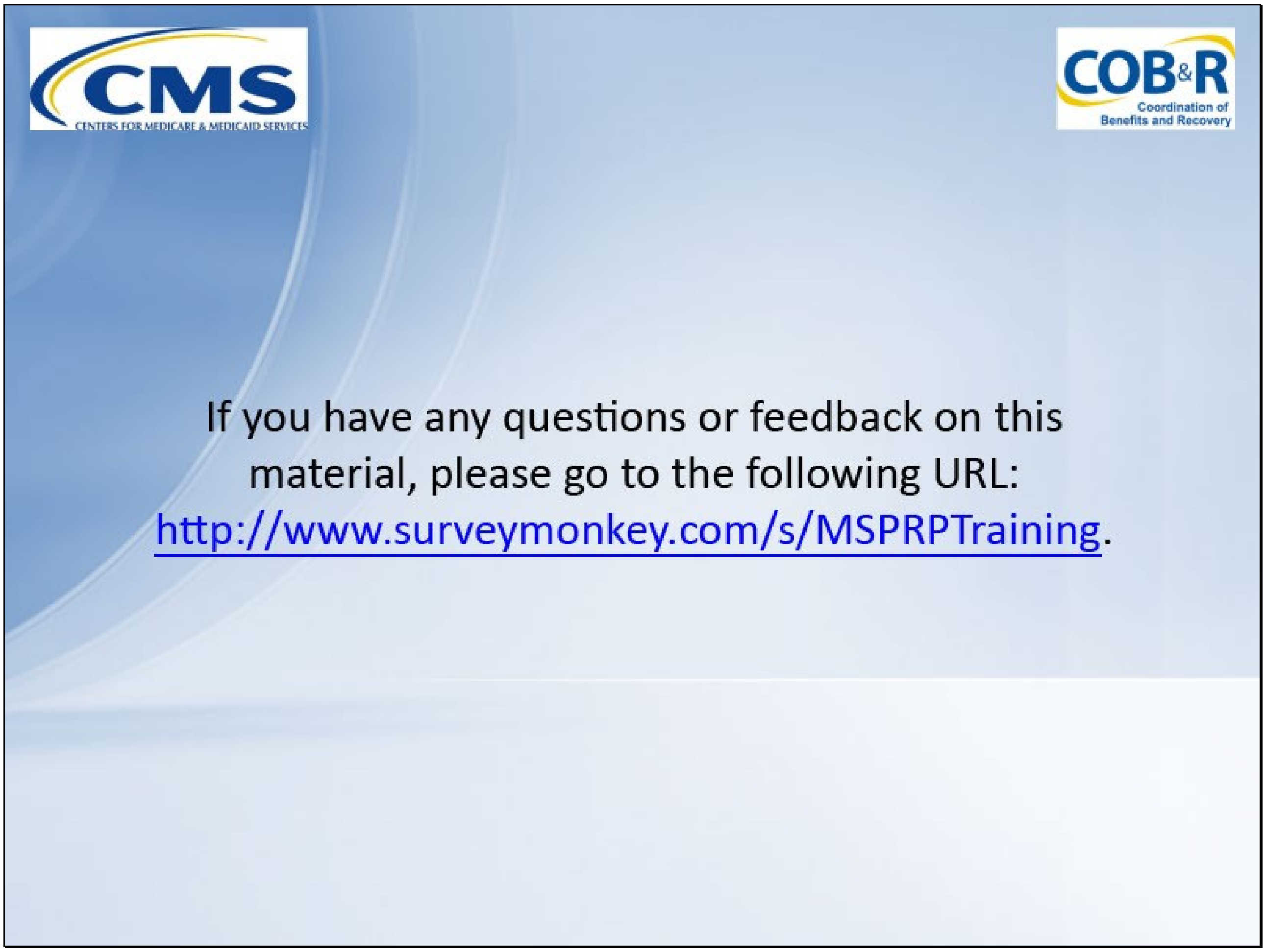

Slide notes

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