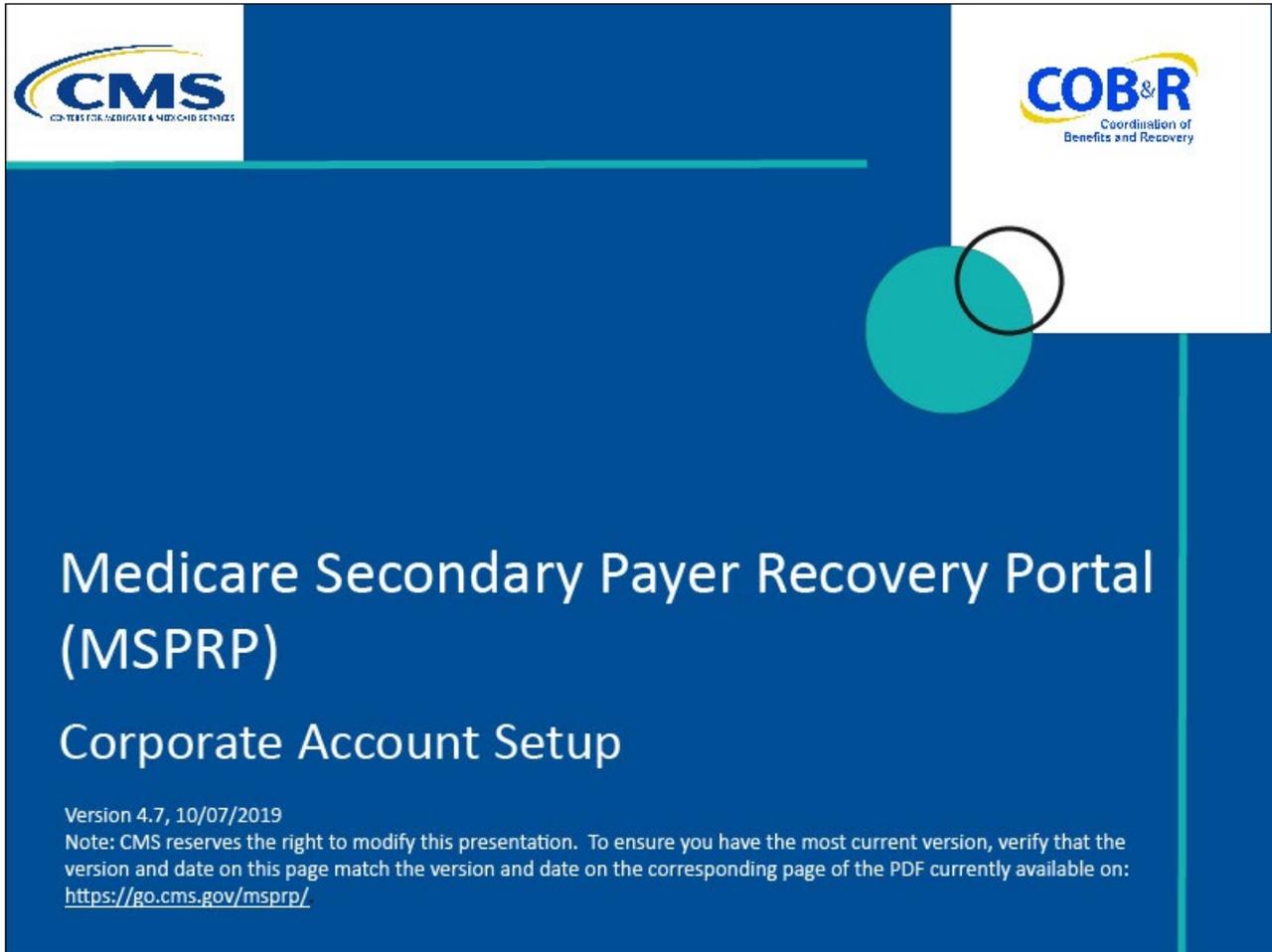


## Corporate Account Setup

### Slide 1 - of 22 - Corporate Account Setup



**Medicare Secondary Payer Recovery Portal (MSPRP)**

**Corporate Account Setup**

Version 4.7, 10/07/2019  
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: <https://go.cms.gov/msprp/>

#### Slide notes

Welcome to the Medicare Secondary Payer Recovery Portal (MSPRP) Corporate Account Setup 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) or Tax Identification Number (TIN) and will be regularly submitting MSPRP requests. Corporate accounts may have up to 200 Account Designees. Note: The select account type page will not display 200 account designees

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.

**Slide 2 - of 22 - Disclaimer**

## 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:  
<http://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 22 - Course Overview

## Course Overview

- Account Setup Process
- Role of the Account Manager
  - How to complete the Account Setup and register
- Next Steps



### Slide notes

This course explained the Account Setup process for a Corporate account.

It described the role of the Account Manager and explained how the Account Manager will complete the Account Setup and register themselves as the Account Manager.

It will conclude with the steps to follow once the Account Setup has been completed.

## Slide 4 - of 22 - Getting Started

## Getting Started

- Identify the Account Manager
- Account Manager completes Account Setup as long as
  - New Registration is complete
  - Account Representative has received the PIN and Account ID



### Slide notes

To begin, the Account Representative must designate the Account Manager. The Account Manager is responsible for completing the Account Setup.

Account Setup can only be initiated after the Corporate entity has completed the New Registration step and their Account Representative has received a mailing from the MSPRP containing the Personal Identification Number (PIN) and Account ID.

The Account Manager will need this information to complete the Account Setup.

## Slide 5 - of 22 - Getting Started

## Getting Started

- Account Manager
  - Established during Account Setup
  - Is a registered MSPRP User
  - Controls administration of the account
  - Manages the overall process
  - Can be associated to other MSPRP accounts as an Account manager or Account Designee
  - May choose to manage the entire account or invite other individuals to assist in the process



### Slide notes

Each MSPRP account must have an assigned Account Manager. This person is established during the Account Setup process. Each MSPRP account can have only one Account Manager.

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.

The Account Manager can be associated to other MSPRP accounts 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 to assist in this process.

For more information on the Account Manager's role and access to MSPRP functionality and cases please see the Account Manager Functions CBT.

Slide 6 - of 22 - Account Setup

## Account Setup

- Account Manager must go to the MSPRP URL:  
<https://www.cob.cms.hhs.gov/MSPRP/>



### Slide notes

Once the Account Manager has been identified and they are ready to begin the Account Setup, they must go to the MSPRP URL at the following link:

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

Slide 7 - of 22 - Login Warning

## Login Warning

 [Print this page](#)

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

This warning banner provides privacy and security notices consistent with applicable federal laws, directives, and other federal guidance for accessing this Government system, which includes: (1) this computer network, (2) all computers connected to this network, and (3) all devices and storage media attached to this network or to a computer on this network. This system is provided for Government-authorized use only.

Unauthorized or improper use of this system is prohibited and may result in disciplinary action, as well as civil and criminal penalties.

Personal use of social media and networking sites on this system is limited as to not interfere with official work duties and is subject to monitoring.

By using this system, you understand and consent to the following:

- \*You have no reasonable expectation of privacy regarding any communication or data transiting or stored on this system.
- \*The Government may monitor, record, and audit your system usage, including usage of personal devices and email systems for official duties or to conduct HHS business. Therefore, you have no reasonable expectation of privacy regarding any communication or data transiting or stored on this system. At any time, and for any lawful Government purpose, the Government may monitor, intercept, and search and seize any communication or data transiting or stored on this system.
- \*Any communication or data transiting or stored on this system may be disclosed or used for any lawful Government purpose.

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

**Slide notes**

Each time a user visits the MSPRP Web site, the 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. Users must agree to the terms of this warning each time they access the MSPRP. Click the [I Accept] link at the bottom of the page to continue.



Slide 9 - of 22 - Account Setup Introduction

**Account Setup Introduction**

You have selected a link that guides you through the process of establishing a new Account Manager ID for the Medicare Secondary Payer Recovery Portal (MSPRP). Please have your Account Identification Number and Personal Identification Number (PIN) available. The Account ID and PIN are listed on the mailing that was sent to the contact for the account. This would be the Account Representative for a corporate account type, and the Representative for a representative account type.

During this process you will:

- Finalize the establishment of the account, and
- Create your personal Login ID for the MSPRP.

Before proceeding it is important to understand the roles of the various MSPRP users, and their respective responsibilities to ensure the MSPRP accounts are managed correctly. The role of the Account Manager is described below.

**Account Manager** - The Account Manager is the MSPRP user who is required to initiate the request for an account. They are the person who administers the account on the Web site on behalf of the registrant. The Account Manager is the person who is responsible for: establishing the account on the Web Portal; managing the case load and assigning some or all of the cases to other responsible parties to complete on the MSPRP; tracking the status of the tasks assigned to others; and ensuring case entry and submission are completed on time. The Account Manager is responsible for inviting other employees to register on the Web Portal and managing their access. The Account Manager may complete and submit cases on his own or invite Designees to assist as needed.

If your user role in the MSPRP is an Account Manager, as described above, and you have not yet registered, press the **Continue** button and proceed with registering as a new Account Manager.

**Continue** **Cancel**

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

**Slide notes**

The Account Setup Introduction page will display. This page describes the Account Setup process and informs the Account Manager of their responsibilities as an MSPRP user.

An Account Manager cannot be an Account Representative for any MSPRP account.

If you are not associated to any account as an Account Representative, click [Continue] to proceed.

## Slide 10 - of 22 - Account Setup

The screenshot shows a web page titled "Account Setup" with a green navigation bar containing links for "About This Site", "CMS Links", "How To...", "Reference Materials", and "Contact Us". The main content area has a yellow background and contains the following text:

**Account Setup**

Please enter your Account Identification Number (Account ID) and Personal Identification Number (PIN) for the account contact after completion of the New Registration step.

New users must go through the process of creating a Login ID and Password.

An asterisk (\*) indicates a required field.

The form includes four input fields:

- \*Account ID:
- \*Personal Identification Number (PIN):
- \*Account Manager's E-mail Address:
- \*Re-enter E-mail Address:

At the bottom of the form are two buttons: "Previous" and "Continue".

A blue callout box on the right side of the form contains the following text:

Contact an Electronic Data Interchange (EDI) Representative by phone at: (646) 458-6740 or by e-mail at: COBVA@GHIMedicare.com

**Slide notes**

The Account Setup page will display.

This page requires the Account Manager to enter the Account ID and PIN that were mailed to the Account Representative after completion of the New Registration process and subsequent validation of the registration by CMS.

The Account Manager will also enter their personal e-mail address.

Note: It is critical that you enter the correct e-mail address for your Account Manager as this information will be used to send important information regarding your account.

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

The system will verify that the Account ID and/or PIN are valid. If either is invalid, an error message will display. If the Account ID and PIN are entered incorrectly 3 times, the account will be locked, and setup will be prevented.

You must contact your Electronic Data Interchange (EDI) Representative to reset the PIN to unlock the account in this case. The EDI Representative may be reached by phone at: (646) 458-6740 or by e-mail at: COBVA@GHIMedicare.com .

The system will also verify that the submitted e-mail address does not match the e-mail address of an Account Representative on any MSPRP account. If the system detects that the user is associated with an MSPRP account, as an Account Representative, the user will be prevented from registering as the Account Manager for this account.

**Slide 11 - of 22 - Account Setup - Corporate Information**

**Account Setup - Corporate Information**

Please verify the following information is correct for the account which you are going to complete the Account Setup process. If the information is correct please click the Continue button to proceed.

Corporate Information	Account Representative Information
Employer Identification Number (EIN):	First Name: FIRST MI: M Last Name: LAST
Corporation Name: AAAAAAAAAA	Phone: ###-###-#### ext. ##

**Business Mailing Address**

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

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

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

**Slide notes**

If the system is able to validate the information entered on the Account Setup page, the Account Setup - Corporate Information page will display. This screen will be pre-filled with the information entered during the New Registration step.

The Employer Identification Number (EIN) associated to the company, the company name and business mailing address, and the Account Representative name and phone number will display.

Review the listed information. If the Account ID and PIN were entered correctly, but the information displayed on this page does not reflect the information for your organization and/or Account Representative, contact an EDI Representative.

If the information is correct, click [Continue] to proceed.

**Slide 12 - of 22 - Account Manager Personal Information**

The screenshot shows a web form titled "Account Manager Personal Information". At the top, there is a green navigation bar with links: Home, About This Site, CMS Links, How To..., Reference Materials, and Contact Us. Below the navigation bar, the form is divided into two main sections. The first section contains fields for \*First Name, MI, \*Last Name, \*E-mail Address (pre-filled with 31302@test-team.cobqa.com), and \*Phone. The second section is titled "Recovery Case Mailing Address" and includes a red instruction: "Please enter the mailing address at which you have previously received correspondence from Medicare related to the recovery case. If you have not received any correspondence from Medicare, enter the address at which you want correspondence directed." Below this are fields for \*Address Line 1, Address Line 2, \*City, \*State (a dropdown menu with "Please Select"), and \*Zip Code. A "Quick Help" box with a "Help About This Page" link is located in the top right. A blue callout box with white text points to the Recovery Case Mailing Address section, stating: "This address will be used to link the account to associated recovery cases". At the bottom of the form, there is a checkbox and text regarding the User Agreement.

**Slide notes**

The Account Manager Personal Information page will display. The information entered on this page is required for subsequent communications. All fields denoted by an asterisk (\*) are required.

Enter the Account Manager's name and phone number. The E-mail Address field will be populated with the e-mail address that was entered on the Account Setup page.

Enter the Recovery Case Mailing Address at which you have previously received correspondence from Medicare related to the recovery case.

If you have not received any correspondence from Medicare regarding this case, enter the address at which you want correspondence directed.

This address will be used to link the account to associated recovery cases.

Once this link is established, the level of authorization that the account can/should have on the case is determined and appropriate MSPRP functionality for that account will be enabled on the MSPRP.

Note: The address entered on this page will update and replace the business mailing address that was entered during the registration process on the Corporate Information page (i.e., if the address entered on this page is different than what was originally submitted).

Slide 13 - of 22 - User Agreement

The screenshot shows a web form with a green navigation bar at the top containing links: Home, About This Site, CMS Links, How To..., Reference Materials, and Contact Us. The form includes several input fields: Address Line 1, Address Line 2, City, State (a dropdown menu with 'Please Select'), and Zip Code. To the right of these fields is a 'Quick Help' box with a 'Help About This Page' link. Below the input fields, there is a paragraph of text: '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.' Below this text is a link: 'View and print the agreement below'. A scrollable box titled 'User Agreement' contains the following text: '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 Secure Web site.' Below the scroll box is a red-bordered box containing the text 'Please check the following box:' followed by a checkbox and the text 'I accept the User Agreement and Privacy Policy above.' At the bottom of this box are two green buttons: 'Previous' and 'Continue'.

Slide notes

When all required fields have been entered, review the User Agreement. You must agree to the terms in the User Agreement in order to proceed with Account Setup. The User Agreement may be viewed in the scroll box on this page.

Alternatively, you can print a copy of the agreement by clicking the [View and print the agreement below] link. To accept the agreement, click the “I accept” checkbox and then click [Continue].

**Slide 14 - of 22 - Account Manager Login Information**

**Account Manager 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 the Account Manager.

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 twenty four (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:

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**

If you do not already have a Login ID for the MSPRP, Workers' Compensation Medicare Set-Aside Portal (WCMSAP) and/or Section 111 Coordination of Benefits Secure Web site (COBSW),

the Account Manager Login Information page will display where you will create your Login ID for the MSPRP.

Note: If you are an existing user of the MSPRP, WCMSAP and/or Section 111 COBSW, you will not create a new Login ID. You will use the same Login ID for each application and therefore will bypass this page. New users must set up a Login ID and Password that conforms to the CMS standard guidelines shown on the slide.

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

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 Account Manager Login Information page, click [Continue].

**Slide 15 - of 22 - Account Manager Summary**

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

## Account Manager 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](#) **Login Information** [Edit](#)

First Name:  MI:  Login ID:

Last Name:

E-Mail Address:

Phone:

**Recovery Case Mailing Address**

Address Line 1:

Address Line 2:

City:

State:

Zip Code:

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

**Quick Help**

[Help About This Page](#)

**Slide notes**

The Account Manager Summary page will display next. This page displays a summarized view of the information that was entered during Account Setup (i.e., Account Manager's personal information and Recovery Case Mailing Address).

It also provides you the opportunity to revise the Account Manager's name, phone number, Login ID and/or Password, and the Recovery Case Mailing Address.

Review this summary 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 Account Manager Summary page.

Note: To make corrections to the Recovery Case Mailing Address, click [Edit] for the Personal Information section. When you have verified the information, click [Continue] to proceed with the Account Setup.

**Slide 16 - of 22 - Thank You**

The screenshot shows a web page with a green navigation bar at the top containing links for Home, About This Site, CMS Links, How To..., Reference Materials, and Contact Us. The main content area is titled "Thank You" and includes a "Print this page" icon. The text on the page reads: "You have successfully completed the initial registration for the Medicare Secondary Payer Recovery Portal Web site. Your assigned Account ID is: [redacted] Please print this page for your records." Below this, there are sections for "Next Steps" and "Account Setup". The "Next Steps" section states: "The information captured during initial registration will be vetted to verify the Corporation is an appropriate submitter. After successful vetting, a letter will be mailed to the Account Representative captured during initial registration, with your Account ID and PIN." The "Account Setup" section states: "Upon receipt of the mailed Account ID and PIN, the Account Representative will be instructed to have the appropriate Account Manager return to the Medicare Secondary Payer Recovery Portal Web site to complete the account setup. The Account Manager will need to enter the Account ID and PIN on the Account Setup page to begin setup." At the bottom of the content area, there is a link for "Medicare Secondary Payer Recovery Portal Welcome Page".

**Slide notes**

The Thank You page will display which confirms that you have successfully completed the Account Setup for the MSPRP Account ID and established yourself as the Account Manager for that Account.

Slide 17 - of 22 - Next Steps

# Next Steps

- Within 10 business days of Account Setup completion, a Profile Report is e-mailed to the Account Representative

Medicare Secondary Payer		
Necessity Portal		
Profile Report		
Account ID: 1234	Account Type: Representative	Date: Month/Date/Year
<b>SSN Contact Information</b>		
Email: AAA@AAA.AAA	Phone: 8888888888	
<b>Representative</b>		
Name: AAAA	Phone: 8888888888	
Address: AAAA	AA 88888	
Email: AAAA@AAA.AAA		
<b>Account Manager</b>		
Name: AAAA	Phone: 8888888888	
Address: AAAA	AA 88888	
Email: AAAA@AAA.AAA		
Account ID: 1234	Account Type: Representative	Date: Month/Date/Year
SSN Contact Information:	Phone: 8888888888	
SAP'S EXERCISING LIMITED ACCESS TO DATA		
<small>I, the undersigned Account Manager for the MSPRP representative account defined above, certify that the information contained in this Registration is true, accurate and complete to the best of my knowledge and belief, and in furtherance thereof I agree to authorize and acknowledge proper collection, use and disclosure of the data for the purposes of MSPRP program claims and processing. Proper safeguards shall include the adoption of policies and procedures to ensure that the data obtained shall be used only in accordance with Section 1102 of the Social Security Act (42 U.S.C. 1102), Section 10512 of the Social Security Act (42 U.S.C. 110512), Section 10503 of the Social Security Act (42 U.S.C. 110503), and the Privacy Act of 1974, as amended (5 U.S.C. 11551). I agree that the authorized representatives of the CMS shall be granted access to, possession of, the Medicare data are used for the purpose of reporting, security, management and compliance. I agree to comply with the security requirements specified below. Access to any information exchanged during the MSPRP necessary process shall be restricted to CMS, COB, and MSPRP personnel, and other authorized users who require access to the system that are of an nature in accordance with the approved use of the information. (1) I agree to authorize the collection, management, use, and disclosure of any required data process. Such collection shall be limited to (1) the administrative nature of the information; (2) separately required to collect the information; and (3) the administrative, not and financial purposes for accounting or statistical purposes. I agree to the following terms:</small>		
Signature of Account Manager: _____ Date: _____		

## Slide notes

Once the Account Manager has completed the Account Setup, an e-mail notification will be sent to the Account Representative. The Account Manager will be copied on this e-mail.

This notification requests the Account Representative to verify the details of the account. It includes a Data Use Agreement and a Profile Report denoting all the information previously recorded during registration and Account Setup.

It may take up to 10 business days to receive the Profile Report.

**Slide 18 - of 22 - Next Steps**

## Next Steps

- Account Representative
  - Must review and sign the Profile Report
    - Contact an EDI Representative to request modifications
  - Return Profile Report via e-mail within 60 business days
    - Put 'MSPRP Profile Report' in the subject line
- If signed Profile Report is not received within 60 days, the account will automatically be deleted

**Slide notes**

The Account Representative must review the Profile Report for accuracy. If information on the Profile Report is inaccurate or requires modifications, please contact an EDI Representative.

The Account Representative will have 60 business days to review, sign and return the Profile Report to the Medicare - EDI Department. When returning the signed Profile Report via e-mail, put 'MSPRP Profile Report' in the subject line.

If a signed Profile Report is not received within that timeframe, the account will be automatically deleted on the 60th business day. If the account is deleted, the registration process must be started from the beginning.

Slide 19 - of 22 - Next Steps

## Next Steps

- Limited functionality until signed Profile Report has been returned
  - Can perform account maintenance
  - Can invite other individuals to be Account Designees
  - Cannot access/view any recovery cases
- It is in your best interest to return the Profile Report promptly



### Slide notes

You will have limited MSPRP functionality until the signed Profile Report has been received. You will only be able to perform account maintenance and invite other individuals to assist as Account Designees.

However, you will not be able to access/view any recovery cases until the Profile Report has been returned.

It is in your best interests to return the Profile Report promptly.

## Slide 20 - of 22 - Course Overview

## Course Summary

- Account Setup Process
- Role of the Account Manager
  - How to complete the Account Setup and register
- Next Steps



### Slide notes

This course explained the Account Setup process for a Corporate account.

It described the role of the Account Manager and explained how the Account Manager will complete the Account Setup and register themselves as the Account Manager.

It will conclude with the steps to follow once the Account Setup has been completed.

**Slide 21 - of 22 - Corporate Account Setup Conclusion**



You have completed the MSPRP Corporate Account Setup 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**

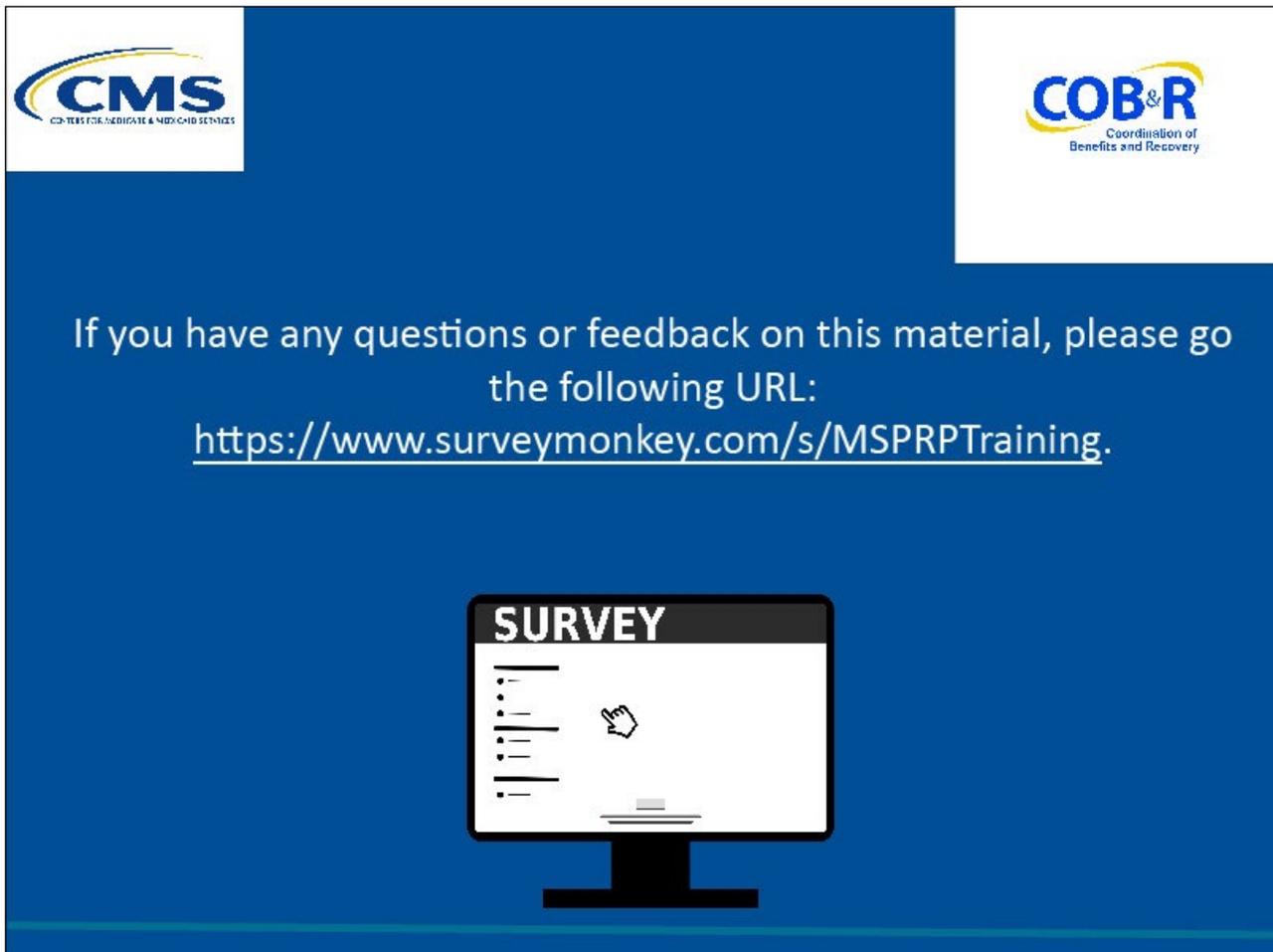
You have completed the MSPRP Corporate Account Setup course. Information in this course can be referenced by using the MSPRP User Manual found at the following link:

<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 22 - of 22 - Survey**



The slide features a dark blue background. 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 central text reads: "If you have any questions or feedback on this material, please go the following URL: <https://www.surveymonkey.com/s/MSPRPTraining>." Below the text is an icon of a computer monitor displaying a survey interface with the word "SURVEY" at the top and a hand cursor pointing to a list of items.

**Slide notes**

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