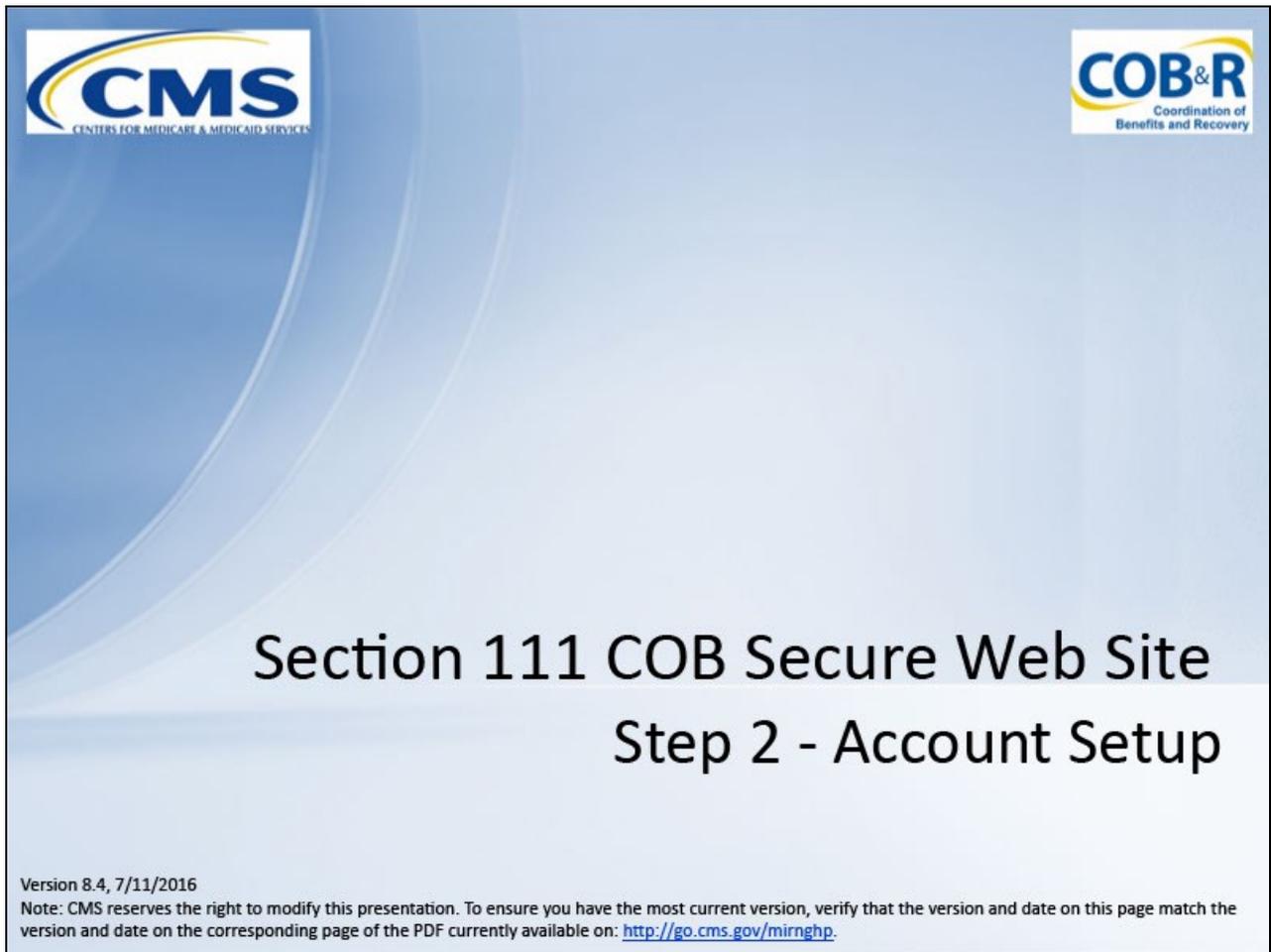


Slide 1 - of 45



The slide features a light blue background with a subtle wave pattern. In the top left corner is the CMS logo (Centers for Medicare & Medicaid Services). In the top right corner is the COB&R logo (Coordination of Benefits and Recovery). The main title is centered in a large, black, sans-serif font. At the bottom left, there is a version number and a note about the presentation's currency, with a URL provided.

CMS
CENTERS FOR MEDICARE & MEDICAID SERVICES

COB&R
Coordination of
Benefits and Recovery

Section 111 COB Secure Web Site Step 2 - Account Setup

Version 8.4, 7/11/2016
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/mirmghp>.

Slide notes

Welcome to the Section 111 Coordination of Benefits (COB) Secure Web Site Step 2- Account Setup course.

Note: This module applies to Responsible Reporting Entities (RREs) that will be submitting Section 111 claim information via an electronic file submission as well as those RREs that will be submitting this information via direct data entry (DDE).

Slide 2 - of 45

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 for the MMSEA Section 111 implementation. All affected entities are responsible for following the instructions found at the following site: <http://go.cms.gov/mirnghp>.

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 for the MMSEA Section 111 implementation.

All affected entities are responsible for following the instructions found at the following site: <http://go.cms.gov/mirnghp>.

Slide 3 - of 45

Course Overview

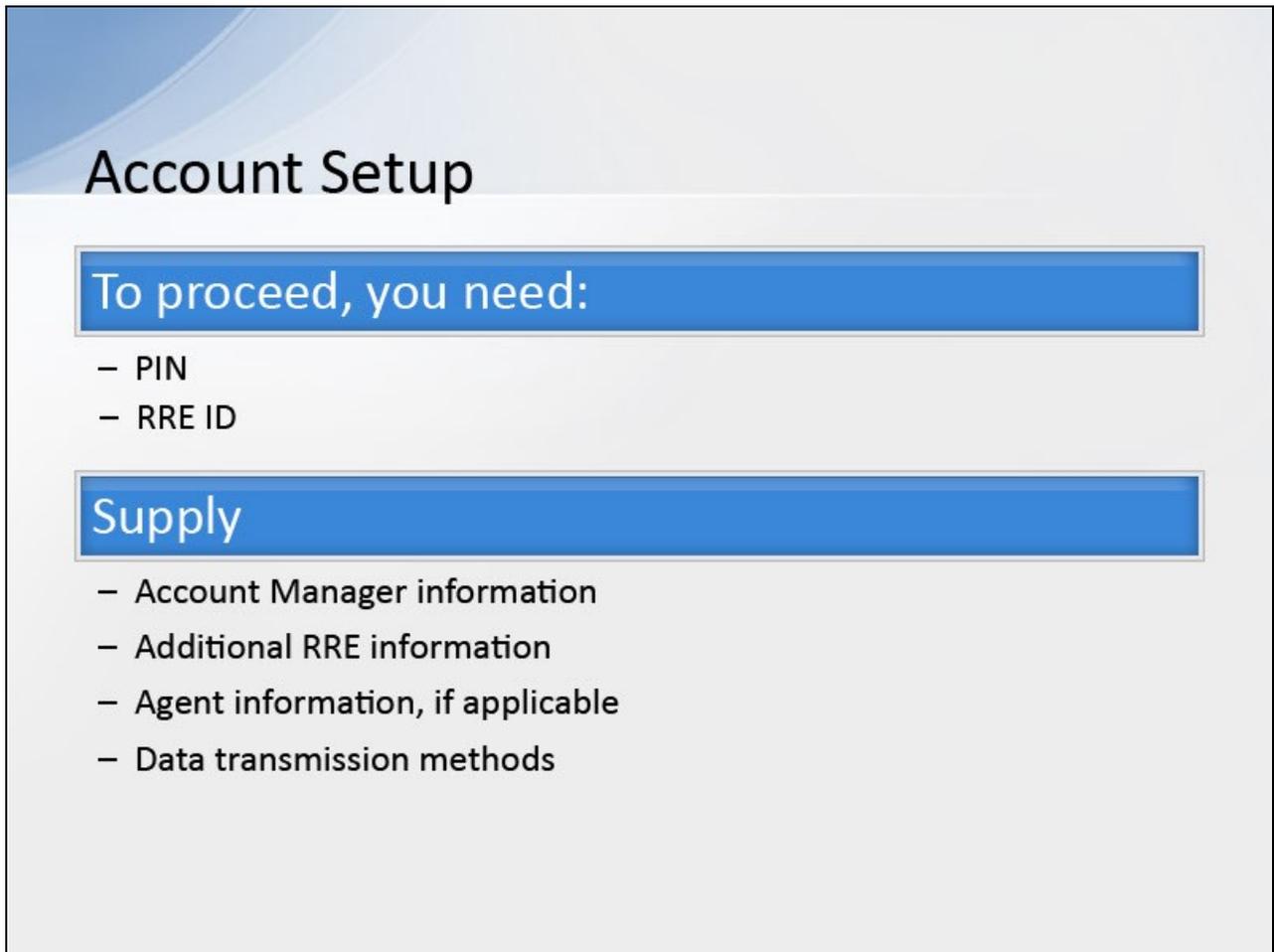
- Step 1
 - New Registration
- Step 2
 - Account Setup



Slide notes

This course will cover Step 2- Account Setup on the Section 111 COBSW.

Slide 4 - of 45

The slide features a light blue header with the title "Account Setup". Below the header, there are two blue-bordered boxes. The first box contains the text "To proceed, you need:" followed by a bulleted list: "- PIN" and "- RRE ID". The second box contains the text "Supply" followed by a bulleted list: "- Account Manager information", "- Additional RRE information", "- Agent information, if applicable", and "- Data transmission methods".

Account Setup

To proceed, you need:

- PIN
- RRE ID

Supply

- Account Manager information
- Additional RRE information
- Agent information, if applicable
- Data transmission methods

Slide notes

You may begin Account Setup (Step 2) if you have already completed New Registration (Step 1) and your RRE's Authorized Representative received a mailing from the

Benefits Coordination & Recovery Center (BCRC) containing the Personal Identification Number (PIN) associated with your Responsible Reporting Entity Identification Number (RRE ID).

You will need the RRE ID and PIN to continue with the Account Setup process.

Before beginning this step, you must identify your Account Manager because they are responsible for completing this step in the Section 111 Registration process.

During Account Setup, account manager information, additional RRE information, agent information (if you are using an agent) and data transmission information will be entered.

Please Note: If you are selecting the Connect:Direct file transmission method, you must have the destination dataset names available or this step cannot be completed and all the other data you provided will be lost.

Slide 5 - of 45

Account Manager

- Each RRE ID can only have one Account Manager
- Controls administration of account
- Manages reporting process
- Can manage entire account or invite others to assist

Slide notes

Each RRE ID can have only one Account Manager. This is the individual who controls the administration of an RRE's account and manages the overall reporting process.

The Account Manager may choose to manage the entire account and data exchange, or may invite other company employees or data processing agents to assist.

Slide 6 - of 45

Account Manager

- Go to the Section 111 COBSW URL
<https://www.cob.cms.hhs.gov/Section111/>

Slide notes

In order to perform the RRE account setup tasks, the RRE's Account Manager must go to the following Section 111 COBSW URL: <https://www.cob.cms.hhs.gov/Section111/>.

Slide 7 - of 45

Login Warning

- Information about Section 111 COBSW security measures
 - Access
 - Penalty
 - Privacy laws

Slide notes

When you first enter the Section 111 COBSW, a login warning is displayed. This page provides information about Section 111 COBSW security measures

including access, penalty and privacy laws. If you accept the terms of the login warning, you will be brought to the Section 111 COBSW Home page.

Slide 8 - of 45

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

Login Warning
 [Print this page](#)

UNAUTHORIZED ACCESS TO THIS COMPUTER SYSTEM IS PROHIBITED BY LAW

You are accessing a U.S. Government information system, which includes: (1) this computer, (2) this computer network, (3) all computers connected to this network, and (4) all devices and storage media attached to this network or to a computer on this network. This information system is provided for U.S. Government-authorized use only.

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

By using this information 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 information 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 information system.

*Any communication or data transiting or stored on this information system may be disclosed or used for any lawful Government purpose.

Privacy Act Statement

The collection of this information is authorized by 42 U.S.C. 1395y(b)(7) & (8). The information collected will be used to identify and recover past mistaken Medicare primary payments and to prevent Medicare from making mistakes in the future for those Medicare Secondary Payer situations that continue to exist.

SAFEGUARDING & LIMITING ACCESS TO EXCHANGED DATA

I agree to establish and implement proper safeguards against unauthorized use and disclosure of the data exchanged for the purposes of complying with the Medicare Secondary Payer Mandatory Reporting Provisions in Section 111 of the Medicare, Medicaid and SCHIP Extension Act (MMSEA) of 2007. Proper safeguards shall include the adoption of policies and procedures to ensure that the data obtained shall be used solely in accordance with Section 1106 of the Social Security Act [42 U.S.C. § 1306], Section 1874(b) of the Social Security Act [42 U.S.C. § 1395kk(b)], Section 1862(b) of the Social Security Act [42 U.S.C. § 1395y(b)], and the Privacy Act of 1974, as amended [5 U.S.C. § 552a]. The Responsible Reporting Entity (RRE) and its duly authorized agent for this Section 111 reporting, if any, shall establish appropriate administrative, technical, procedural, and physical safeguards to protect the confidentiality of the data and to prevent unauthorized access to the data provided by CMS. I agree that the only entities authorized to have access to the data are CMS, the RRE or its authorized agent for Mandatory Reporting. RREs must ensure that agents reporting on behalf of the RRE to limit access to only the RRE and CMS and the agent. Further, if the RRE is acting solely on behalf of the unique RRE on whose behalf the data will be granted access to premises where the Medicare data is being kept for the RRE and its duly authorized agent, if any, is in compliance with the security and to any records created by the matching process shall be restricted to access to perform their official duties in accordance with the uses of the information. Such personnel shall be advised of (1) the confidential nature of the information and (2) the administrative, civil and criminal penalties for noncompliance contained in the Social Security Act.

If you accept the terms, click the I Accept link to proceed to the Section 111 COBSW Home page.

[I Accept](#)
[Decline](#)

Slide notes

The Login Warning is displayed.

If you accept the terms, click the I Accept link to proceed to the Section 111 COBSW Home page.

Slide 9 - of 45

Slide notes

Click on the Account Setup button to begin.

Slide 10 - of 45

Account Setup Introduction

- Enter
 - RRE ID
 - PIN
 - E-mail Address

- New COBSW users
 - Create new Login ID and Password

Slide notes

The Account Setup Introduction page requires you to enter the RRE ID and PIN that were mailed to your Authorized Representative.

Your e-mail address is also required to determine whether you are a registered user.

New users must go through the process of creating a new Login ID and Password before setting up an RRE account.

If you have already registered to use the Section 111 COB Secure Website you will not be prompted to create a Login ID and Password.

The Account Manager should complete this step in the Section 111 Registration process.

The individual who completes the Account Setup is automatically the Account Manager, so plan this step accordingly.

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Account Setup Introduction

 [Print this page](#)

Please enter your Responsible Reporting Entity Identification Number (RRE ID) and Personal Identification Number (PIN) sent to your Authorized Representative after completion of the New Registration step.

We also ask for your E-mail address to see if you already have a Section 111 COBSW Login ID. New users must go through the process of creating a Login ID and Password. Existing users will bypass that step.

Select **Continue** to proceed to the next page or **Back** to return to the previous page.

*** Required**

Please provide the following:

RRE ID:*

RRE PIN:*

E-mail address:*

Re-enter E-mail address:*

Enter your RRE ID.

Slide notes

Enter your RRE ID. Enter your PIN. Enter and re-enter your E-mail Address.

Click the Continue button to submit the information and proceed to the next page of Account Setup.

Click the Cancel button to terminate the action. Anytime you click the Cancel button, you will be returned to the previous page and the information you entered will not be saved.

Slide 12 - of 45

Company Information

- Company
- Subsidiary
- Authorized Representative
- EDI Representative

Slide notes

The Company Information page displays information for the company, subsidiaries, Authorized Representative and (Electronic Data Interchange) EDI Representative associated with this RRE ID.

You will need to review this information for accuracy. If any of the data is incorrect, you will be able to edit the data once you have created a Login ID for the Section 111 COBSW.

Slide 13 - of 45

Company Information  [Print this page](#)

Please verify that you are setting up information entered during the New Registration step.

The Company Information page appears.

RRE ID: #####

RRE Information	Subsidiary Information
EIN/TIN: #####	AAAAAAAAAAAA NAIC No: ##### EIN/TIN: #####
Reporter Type: Liability/ No Fault/ Workers' Compensation	
AAAAAAAAAAAA	
AAAAAAAAAAAA	
AAAAAAAAAAAA, ST #####	
Telephone: (###)###-####	
Fax: --	

Authorized Representative Information	EDI Representative Information
FIRST LAST	FIRST LAST
TITLE	Telephone: ###-###-####
AAAAAAAAAAAA	Email: address@domain.com
AAAAAAAAAAAA	Fax: ###-###-####
AAAAAAAAAAAA, ST #####-####	
EIN/TIN: #####	
Telephone: (###)###-#### extn: ###	
Fax: (###)###-####	
Email: address@domain.com	

Slide notes

The Company Information page appears. Click the Continue button to proceed.

Slide 14 - of 45

Account Setup Introduction

- Establish new account
 - RRE information
 - Account Manager information
 - Data transmission methods (file or DDE)

Slide notes

You will now go through the process of establishing a new account for the Section 111 COBSW.

The next few pages will collect basic information related to the RRE, the Account Manager associated with the RRE, and the data transmission methods (file or DDE).

Slide 15 - of 45

Account Setup Introduction  [Print this page](#)

Please enter your Responsible Reporting Entity Identification Number (RRE ID) and Personal Identification Number (PIN) sent to your Authorized Representative after completion of the New Registration step.

We also ask for your E-mail address to see if you already have a Section 111 COBSW Login ID. New users must go through the process of creating a Login ID and Password. Existing users will bypass that step.

Select **Continue** to proceed to the next page or **Cancel** to return to the previous page.

*** Required**
Please provide the following:

RRE ID:*	<input type="text"/>
RRE PIN:*	<input type="text"/>
E-mail address:*	<input type="text"/>
Re-enter E-mail address:*	<input type="text"/>

Click the **Continue** button to proceed.

Slide notes

Click the Continue button to proceed.

Slide 16 - of 45

Account Manager Information

Provide your personal information as the Account Manager for this RRE ID.

As the Account Manager, you will control the administration of the account and manage the overall reporting process. Later, you may choose to invite other RRE employees or data processing agents to become Account Designees and assist with the reporting process.

Please enter your personal information below:

*** Required**

First Name:*

Last Name:*

Job Title:*

E-mail Address:

On this page you will enter information about the Account Manager.

Account Manager Mailing Address

Street Line 1:*

Street Line 2:

City, State, Zip:* , Please Select -

Telephone:* () - ext

Fax: () -

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

[View and print the agreement below](#)

User Agreement

THE FOLLOWING DESCRIBES THE TERMS AND CONDITIONS BY WHICH THE CENTERS FOR MEDICARE MEDICAID SERVICES (CMS) OFFERS YOU ACCESS TO THE COORDINATION OF BENEFITS (COB) SECURE WEB SITE

You must read and accept the terms and conditions contained in this User Agreement

Please check the following box:

I accept the User Agreement and Privacy Policy above

Slide notes

On this page you will enter information about the Account Manager.

Name: Name of the individual who controls the administration of the RRE's account and manages the overall reporting process.

Warning: The person named as the Authorized Representative cannot also be the Account Manager. The Authorized Representative cannot be a user of the Section 111 COBSW for any RRE ID and therefore cannot perform the Account Setup.

Job Title: Job title of the Account Manager. E-mail Address will be populated with the address that was entered on the Account Setup Introduction page.

Address: Company or work mailing address of your Account Manager.

Telephone: Company or work telephone number where your Account Manager can be reached.

Fax: Company or work facsimile number used by your Account Manager.

Slide 17 - of 45

Account Manager Information

Provide your personal information as the Account Manager for this RRE ID.

As the Account Manager, you will control the administration of the account and manage the overall reporting process. Later, you may choose to invite other RRE employees or data processing agents to become Account Designees and assist with the reporting process.

Please enter your personal information below:

*** Required**

First Name:*

Last Name:*

Job Title:*

E-mail Address:

Account Manager Mailing Address

Street Line 1:*

Street Line 2:

City, State, Zip:* , -

Telephone:* () - ext

Fax: () -

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

[View and print the agreement below](#)

User Agreement

Read and accept the terms of the User Agreement.

I accept the User Agreement and Privacy Policy above

Slide notes

Read and accept the terms of the User Agreement.

Click the Continue button to proceed.

Slide 18 - of 45

Account Manager Login Information

- Authenticates your identity when you log in
- Login ID
 - Must be 7 characters
 - Must be in the format of AA999AA
- Password
 - Must be 8 characters
 - Must have at least 1 upper case character, 1 lower case character and, and 1 numeric value
- Security questions allow you to regain account access if you forget your Login ID or password

Slide notes

The security information requested on this page will allow the system to authenticate your identity each time you log in to the Section 111 COBSW.

Choose your Login ID and Password carefully. Login IDs must be 7 characters.

Login IDs must be in the format of AA999AA (first two alphabetic, next three numeric, last two alphabetic). They are case sensitive.

Password must be 8 characters in length. Password must have at least 1 upper case character, 1 lower case character, and 1 numeric value.

The security questions allow you to regain account access if you forget your Login ID or Password. Please note the answers you provide to these questions

should be actual answers and not hints for your Password. The system will ask you these questions if you request your Login ID or Password.

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Login Information

*** Required**

The security information requested on this page will allow the system to authenticate your identity each time you log in to the Section 111 Secure Web site.

Choose your Login ID and password carefully.

- Login IDs must be 7 characters
- Login IDs must be in the format of AA999AA (first two alphabetic, next three numeric, last two alphabetic)
- Password must be changed every 60 days
- Password must be at least 8 characters in length
- Password must contain at least one upper-case letter, lower-case letter, number, and special character
- Password must contain a minimum of 4 characters changed from the previous password
- Passwords cannot be changed more than once per day
- Passwords must be different from the last 24 passwords
- Password cannot contain a reserved word (See Help About This Page for a complete list)

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.

Security Question 1:*

Answer 1:*

Security Question 2:*

Answer 2:*

Slide notes

Enter a Login ID that meets the login requirements.

Enter and re-enter a Password that meets the Password requirements.

Select two Security Questions from the drop down menus and provide answers to these questions.

Click Continue to proceed.

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RRE Information

- Populated with New Registration information
- Complete the following additional fields
 - Lines of Business
 - Profile Information
 - Estimated number of covered individuals
 - Agent (Yes/No)
 - Claim Submission Method
 - File transmission
 - Direct Data Entry

Slide notes

The page will be populated with the information that was submitted during Step 1- New Registration (company name and address).

There will also be additional fields that must be completed: insurer lines of business, profile information (including estimated number of paid claims per year, and whether your company will be using an agent to report along with the agent's Employer Identification Number (EIN) or Tax ID Number (TIN)) and the Claim Submission Method (File transmission or Direct Data Entry).

Note: If you indicate that a reporting agent will be submitting data on your behalf, you will need to provide information about the Agent.

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Direct Data Entry (DDE)

- Open to all RREs that meet definition of Small Reporter
- New RREs will select DDE as their Claim Submission Method
- If existing RRE wants to change to DDE option
 - Please see “Switching to or From Direct Data Entry CBT”

Slide notes

The DDE option is open to all RREs that meet the definition of a Small Reporter. New RREs will select DDE as their claim submission method during the Account Setup process.

If an RRE has already registered under the current file transmission methods and wants to change to the DDE option, please see the “Switching to or From Direct Data Entry” CBT for more information.

Slide 22 - of 45

RRE ID Profile Information

EIN/TIN: #####
Reporter Type: GHP

Required*

Company Name: AAAAAAAAAAAAA
Address 1: AAAAAAAAAAAAA
Address 2: AAAAAAAAAAAAA
City, State Zip: AAAAAAAAAAAAA ,ST ##### - #####
Telephone: ### ### #####
Fax: ### ### #####

File Submission Profile Information

Lines of Business* Hospital Medic

HRA Records only

Estimated Number of Covered Individuals*

Reporting Level* Basic Expanded

Will an Agent report data on your behalf?* Yes No

Agent Company EIN/TIN:

Would you like to receive Unsolicited Alerts? Check here to receive Unsolicited Alerts.

This portion of the RRE Information page will be populated with information submitted during Step 1- New Registration.

Slide notes

This portion of the RRE Information page will be populated with information submitted during Step 1- New Registration.

Insurer Lines of Business: Coverage provided by the RRE reflected in your file submission. Check all that apply by clicking the check box(es).

Estimated Number of Paid Claims Per Year: An estimated number of annual paid claims for the lines of business that will be reported under this RRE ID.

RREs with very few claim reports to make per year may choose to submit claim information using the DDE method on the Section 111 COBSW.

If you are newly registering and will be using the DDE submission method, you must specify an estimated number of claims of 500 or less. If you specify more than 500 claims, you will not be permitted to select the DDE submission method.

Slide 23 - of 45

RRE ID Profile Information

EIN/TIN: #####
Reporter Type: GHP

Required*

Company Name: AAAAAA
Address 1: AAAAAAAAAA
Address 2: AAAAAAAAAA
City, State Zip: AAAAAA
Telephone: ### ### ####
Fax: ### ### ####

File Submission Profile I

Lines of Business* H
HRA Records only

Estimated Number of Cove

Reporting Level* Basic Expanded

Will an Agent report data on your behalf?* Yes No

Agent Company EIN/TIN:

Would you like to receive Unsolicited Alerts? Check here to receive Unsolicited Alerts.

Will an Agent report data on your behalf?: Select **Yes** or **No** by clicking the appropriate radio button.

Answer **Yes** if another entity (consulting company, data services company, etc.) will submit your Section 111 data.

Note: RREs that select DDE may use agents to perform their DDE for an RRE ID(s) as long as the agent is set up as the Account Manager or Account Designee for the RRE ID.

Select **No** if you will not be using an Agent.

Slide notes

Will an Agent report data on your behalf?: Select Yes or No by clicking the appropriate radio button.

Answer Yes if another entity (consulting company, data services company, etc.) will submit your Section 111 data.

Note: RREs that select DDE may use agents to perform their DDE for an RRE ID(s) as long as the agent is set up as the Account Manager or Account Designee for the RRE ID. Select No if you will not be using an Agent.

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RRE ID Profile Information

EIN/TIN: #####
Reporter Type: GHP

Required*

Company Name: AAAAAAAAAAAAA
Address 1: AAAAAAAAAAAAA
Address 2: AAAAAAAAAAAAA
City, State Zip: AAAAAAAAAAAAA ,ST ##### - ####
Telephone: ### ### ####
Fax: ### ### ####

File Submission Profile Information

Lines of Business* Hospital Medical Prescription Drug

HRA Records only

Estimated Number of Covered Individuals: _____

Reporting Level* Basic Expanded

Will an Agent report data on your behalf? Yes No

Agent Company EIN/TIN:

Would you like to receive Unsolicited Alerts? Check here to receive Unsolicited Alerts.

If you will be using an Agent, enter the Agent company's EIN or TIN.

Slide notes

If you will be using an Agent, enter the Agent company's EIN or TIN. Click Continue to proceed.

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Agent Information

You have indicated information:

** Required*

Agent Company EIN/

Agent Company Name:*

Agent Contact First Name:*

Agent Contact Last Name:*

Agent Company Address

Street Line 1:*

Street Line 2:

City, State, Zip:*

Agent Contact Telephone:*

ent

If you indicated that you will be using an Agent to report, you will need to submit information about the Agent on this page.

Slide notes

If you indicated that you will be using an Agent to report, you will need to submit information about the Agent on this page.

Agent Company Name: Name of the company which will be submitting Section 111 data to the BCRC on your behalf.

Agent Contact Name: Name of the technical contact for your Agent company.

Agent Company Address: Company or work mailing address for the technical contact at your Agent company.

Agent Contact Telephone: Company or work telephone number where your Agent technical contact can be reached.

Click Continue to proceed.

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About This Site	CMS Links	How To...	Reference Materials	Contact Us
RRE Information Summary  Print this page				
Please review the information for your RRE ID account. If you need to change any of the information, click the Edit button under the appropriate section. Print this page for your records.				
RRE Company Information		Agent Information		
Acme 6 123 Main Street Towson, MD 21204 EIN/TIN: 912345675 Telephone: 123-456-7890 Fax: 123-455-7890 Lines of Business: NO Fault Estimated Number of Covered Individuals: 300		Agent Company Name: Help U out Agent Contact Name: Marcus Nottingham 129 Riverdrive Rd York, PA 66777-7777 Agent Contact Telephone: (777)666-7777 extn: 6666		
<input type="button" value="Edit"/>		<input type="button" value="Edit"/>		
Account Manager Personal Information				
Nicole Waters AM 234 Next street Towson, MD Telephone: (222)333-5555 extn: 6666 Fax: (555)666-5555 Email: nonDDE@donna-p.cobqa.com				
<input type="button" value="Edit"/>				
Transmission Methods Direct Data Entry				
<input type="button" value="Edit"/>				
<input type="button" value="Continue"/> <input type="button" value="Cancel"/>				

After you have entered information for the RRE Company, Agent, and Account Manager and if the RRE ID Account you are setting up is for DDE, you will see the *RRE Information Summary* page. Review this information for accuracy.

Slide notes

After you have entered information for the RRE Company, Agent, and Account Manager and if the RRE ID Account you are setting up is for DDE, you will see the RRE Information Summary page. Review this information for accuracy.

If you need to change any of the information, click the Edit button for the appropriate section. You may print this page for your records.

Once you have verified all of the information and would like to submit the information, click the Continue button.

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File Transmission Methods

- Select file transmission methods for
 - Claim Input File
 - Query Only File

- File transmission method options
 - Connect:Direct
 - SFTP
 - HTTPS

- If using HEW Software, select version

Slide notes

If the RRE ID Account you are setting up is for a file transmission process, you will be required to select the file transmission method you will be using for each file type you will be supplying.

Liability/No Fault/ Workers' Compensation reporters will supply information for the Claim Input and Query Only Files. There are three separate methods of data transmission:

Connect:Direct (NDM via the CMSNet), Secure File Transfer Protocol (SFTP) or Hypertext Transfer Protocol over Secure Socket Layer (HTTPS).

The BCRC will return the response file back to the RRE using the same transmission method that was chosen for the corresponding input file.

You will also need to supply information about the Health Insurance Portability and Accountability Act (HIPAA) Eligibility Wrapper (HEW) Software.

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File Transmission Methods

Please choose a file transmission method for each file type you will be supplying.

*** Required**

MSP File

File Transmission Method: *

Query Only File

File Transmission Method:

If you plan on using the HIPAA Eligibility Wrapper (HEW) Software supplied by the BCRC, please select the version:

Slide notes

Select the File Submission Method. Choose from MSP File or Query Only File. File Transmission Method: Select Connect:Direct, SFTP or HTTPS from the drop down menu for the file.

HEW Software Version: Used for Query Only files. Select from Mainframe or PC/Server Based. HEW software translates (wraps) the file into a HIPAA-compliant 270 eligibility query file format. The 270 format is created to transfer the file.

The program also runs against the response file to put the file into a format that can be read (unwrapped) on your system. Contact your EDI Representative to request a copy of this software if you do not receive it by the time your RRE is approved for testing. Click Continue to proceed.

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RRE Information Summary

Account information is displayed

- RRE Company Information
- Agent Information
- Account Manager Personal Information
- Account Manager Login Information
- Reporting Option Information
- File Transmission Methods

Review and edit as needed

Print for your records

Slide notes

After you have completed the required RRE Company, Agent, Account Manager, and file transmission method information, the information you entered is displayed.

Review this information for accuracy. If you need to change any of the information, click the 'Edit' button in the appropriate section. Print this page for your records.

Slide 30 - of 45

RRE Information Summary  [Print this page](#)

Please review the information for your RRE ID account. If you need to change any of the information, click the Edit button under the appropriate section. Print this page for your records.

The RRE Information Registration Summary page displays the account information that has been entered.

RRE Company Information

AAAAAAAAAAAAA
AAAAAAAAAAAAA
AAAAAAAAAAAAA,ST #####
EIN/TIN: #####
Telephone: ###-###-####
Fax: --
Lines of Business:
Medical
Estimated Number of Covered Individuals: 600
HRA Records only: N
Receive Unsolicited Alerts: Y

me: AAAAAAAAAAAAA
e: FIRST LAST

AAAAAAAAAAAAA,ST #####
Agent Contact Telephone: (###)###-#### extn: ###

Account Manager Personal Information

FIRST LAST
TITLE
AAAAAAAAAAAAA

AAAAAAAAAAAAA,ST #####
Telephone: (###)###-#### extn: ###
Fax: (###)###-####
Email: email@domain.com

Transmission Methods
File Transmission Method

File Type: MSP Transmission Type: Hypertext Transfer Protocol over Secure Socket Layer (HTTPS)
File Type: Query Only Transmission Type:
HEW Software:

Slide notes

The RRE Information Registration Summary page displays the account information that has been entered. If you need to change any of the information, click the Edit button under that section.

Slide 31 - of 45

Agent Information

You have indicated that a reporting agent information:

*** Required**

Agent Company EIN/TIN:

Agent Company Name:*

Agent Contact First Name:*

Agent Contact Last Name:*

Agent Company Address

Street Line 1:*

Street Line 2:

City, State, Zip:* , -

Agent Contact Telephone:* () - ext.

Once you click the **Edit** button for a section, you will be taken to the appropriate information entry page. Add, change or delete any of the information as needed.

Slide notes

Once you click the Edit button for a section, you will be taken to the appropriate information entry page. Add, change or delete any of the information as needed.

Once the information is correct, click the Continue button to submit the information and return to the Registration Summary page.

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RRE Information Summary  [Print this page](#)

Please review the information for your RRE ID account. If you need to change any of the information, click the Edit button under the appropriate section. Print this page for your records.

Click the Print this page link to print the information displayed on this page.

RRE Company Information

AAAAAAAAAAAA
 AAAAAAAAAAAAA
 AAAAAAAAAAAA,ST #####
 EINTIN: #####
 Telephone: ###-###-####
 Fax: --
 Lines of Business:
 Medical
 Estimated Number of Covered Individuals: 600
 HRA Records only: N
 Receive Unsolicited Alerts: Y

Name: AAAAAAAAAAAAA
 Name: FIRST LAST

Agent Contact Telephone: (###)###-#### extn: ###

Account Manager Personal Information

FIRST LAST
 TITLE
 AAAAAAAAAAAAA

AAAAAAAAAAAA,ST #####
 Telephone: (###)###-#### extn: ###
 Fax: (###)###-####
 Email: email@domain.com

Transmission Methods

File Transmission Method

File Type: MSP Transmission Type: Hypertext Transfer Protocol over Secure Socket Layer (HTTPS)
 File Type: Query Only Transmission Type:
 HEW Software:

Slide notes

Click the Print this page link to print the information displayed on this page.

Once you have reviewed all of the information on the Registration Summary page and would like to submit the information, click the Continue button.

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Thank You

- Displayed after successful completion of account setup
- Contains RRE ID and EDI Representative information
- Details on next steps
- Print for your records

Slide notes

After you have successfully completed the Account Setup for the MMSEA Section 111 COBSW, a “Thank You” page is displayed.

This page will contain your assigned RRE ID and EDI Representative information. Your EDI Representative is your main contact for your Section 111 RRE account, file transmission and reporting issues.

Details on what steps to take next are also provided on this page. Please print this page for your records.

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Thank You

You have successfully completed Step 2, Account Setup, in the Section 111 registration process. This page confirms that you completed Step 2, Account Setup, in the Section 111 registration process.

Your assigned RRE ID is:
#####

Your EDI Representative
The following individual has been assigned as your EDI representative, contact the EDI representative if you any questions regarding the RRE account. Please have your above account number available for reference.

FIRST LAST
Telephone: ###-###-####
Email: address@domain.com
Fax: ###-###-####

Next Steps
Now that this RRE ID Account Setup has been submitted, the information provided will be validated by the BCRC. Once this is completed, the BCRC will send a profile report via E-mail to the named Authorized Representative. You as the Account Manager will be copied on the E-mail.

Your Authorized Representative must review, sign and return the profile report to the BCRC. At that point, you may begin testing your Section 111 files. The BCRC will send an E-mail to your Authorized Representative and Account Manager indicating that testing can begin.
If you do not receive your profile report within 10 business days, please contact your assigned EDI Representative.

You may now return to the Section 111 COBSW homepage, login using the Login ID and Password you just created and invite other users to become Account Designees associated with your RRE ID. This is done by using the Designee Maintenance action from your RRE Listing page.

[Print this page](#)

Slide notes

This page confirms that you completed Step 2, Account Setup, in the Section 111 registration process.

Click the Login button to return to the Section 111 COBSW Home page and login as a user.

Click Exit to exit the Section 111 COBSW.

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Important Information to Consider

- Account Setup
 - Must be completed by Account Manager
 - May not be completed by Authorized Representative
- If Authorized Representative's information is entered by mistake
 - Stop
 - Do not complete Account Setup
 - Contact EDI Department and get information corrected

Slide notes

Remember: The Account Setup step must be completed by the Account Manager during which time he/she will provide their information as the Account Manager.

The Account Setup step may not be completed by the Authorized Representative. If the Authorized Representative's information is entered by mistake during this step, stop.

Do not complete the Account Setup step. Contact the EDI Department, and get the information corrected before proceeding to the Account Setup step.

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Next Steps

- Profile Report sent to Authorized Representative
 - Registration and Account Setup summary information
 - RRE ID
 - EDI Representative contact information
- If you are using a File Transmission Method to submit claims
 - Data file transmission information
 - Production live date and ongoing quarterly file submission timeframe for Claim Input File
- Review, sign, and return Profile Report to the BCRC

Slide notes

Once the Account Setup has been completed on the Section 111 COBSW and processed by the BCRC, a profile report will be sent to your Authorized Representative via e-mail.

The Profile Report contains registration and account set up summary information, RRE ID, and EDI Representative contact information. If you are using a file transmission method to submit your claims, your profile report will also contain data file transmission information and assigned production live date and ongoing quarterly file submission timeframe for the Claim Input File.

Your Authorized Representative must review, sign and return the profile report to the BCRC.

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Next Steps

- DDE Submitters
 - Set to a production reporting status after completing registration process
 - Must commence production reporting

Slide notes

Those RREs registering for DDE will be set to a production reporting status immediately after completing the registration process and must commence production reporting of applicable claims on the Section 111 COBSW.

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Next Steps

- File Submitters
 - May begin testing after the BCRC has received their signed profile report
 - RRE ID
 - Status will be updated by the system as each registration step is completed
 - Placed in Testing status once BCRC receives signed profile report
 - Placed in Production status once testing is completed
 - Expected to move to Production status within 180 days after completion of New Registration step

Slide notes

RREs who have not registered for DDE, may begin testing after the signed profile report has been received by the BCRC.

The status of your RRE ID will be updated by the system as each step of the registration process is completed.

Once the BCRC receives your signed profile report, your RRE ID will be placed in a Testing status. Once testing is completed, your RRE ID will be placed in a Production status.

RRE IDs are expected to move to a Production status within 180 days after initiation of the registration process (completion of the New Registration step).

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Next Steps

- Login to account
 - Maintain RRE information
 - Monitor file processing
 - Review prior file processing results
 - Upload/download files via HTTPS/SFTP (RREs that have selected a file transmission method)
 - Submit and view claim information directly on the Section 111 COBSW (RREs that have selected DDE)

Slide notes

After you complete Account Setup and the BCRC has processed your profile report, you will be able to login to your account.

When you login to the account, you will be able to maintain RRE information (Name, Address, Contact Information), monitor file processing and review prior file processing results.

RREs that have selected a file transmission method will also be able to upload and download files via HTTPS/SFTP. RREs that have selected DDE will be able to submit and view claim information directly on the Section 111 COBSW.

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Section 111 COBSW E-mail Notifications

- The emails described on the next three slides are generated by the system
 - Authorized Representative
 - Account Manager
 - Account Designees

Slide notes

The e-mails described on the next three slides are generated by the system to the Authorized Representative, Account Manager, and/or Account Designees for the RRE ID.

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Section 111 COBSW E-mail Notifications

E-mail notification	Recipient	Purpose
Profile Report	Authorized Representative, Account Manager	Sent after Account Setup step is complete on the Section 111 COBSW. Included attachment with Profile Report. Profile report must be signed by the RRE's Authorized Representative and returned to the BCRC.
Non-Receipt of Signed Profile Report	Authorized Representative, Account Manager	Generated 30 days after the Profile Report e-mail if a signed copy of the profile report has not been received at the BCRC. The Authorized Representative for the RRE ID must sign and return the profile report. If another copy is needed, contact your EDI Representative.
Successful File Receipt	Account Manager	Sent after input file has been successfully received at the BCRC. Informational only. No action required.
Late File Submission	Authorized Representative, Account Manager	Sent 7 days after the end of the file submission period if no Claim Input File was received for the RRE ID. Send file immediately and contact your EDI Representative. This e-mail may be ignored if you have nothing to report for the quarter.

Slide notes

The following e-mails are generated by the system to the Authorized Representative, Account Manager, and/or Account Designees for the RRE ID.

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Section 111 COBSW E-mail Notifications

E-mail notification	Recipient	Purpose
Threshold Error	Account Manager	Sent when an input file has been suspended for a threshold error. Contact your EDI Representative to resolve.
Severe Error	Account Manager	Sent when an input file has been suspended for a severe error. Contact your EDI Representative to resolve.
Ready for Testing	Account Manager	Account setup is complete and the signed profile report has been received at the BCRC. The RRE may begin testing.
Ready for Production	Account Manager	Testing requirements have been met and production files will now be accepted for the RRE ID.
Successful File Processed	Account Manager	The BCRC has completed processing on an input file and the response file is available.

Slide notes

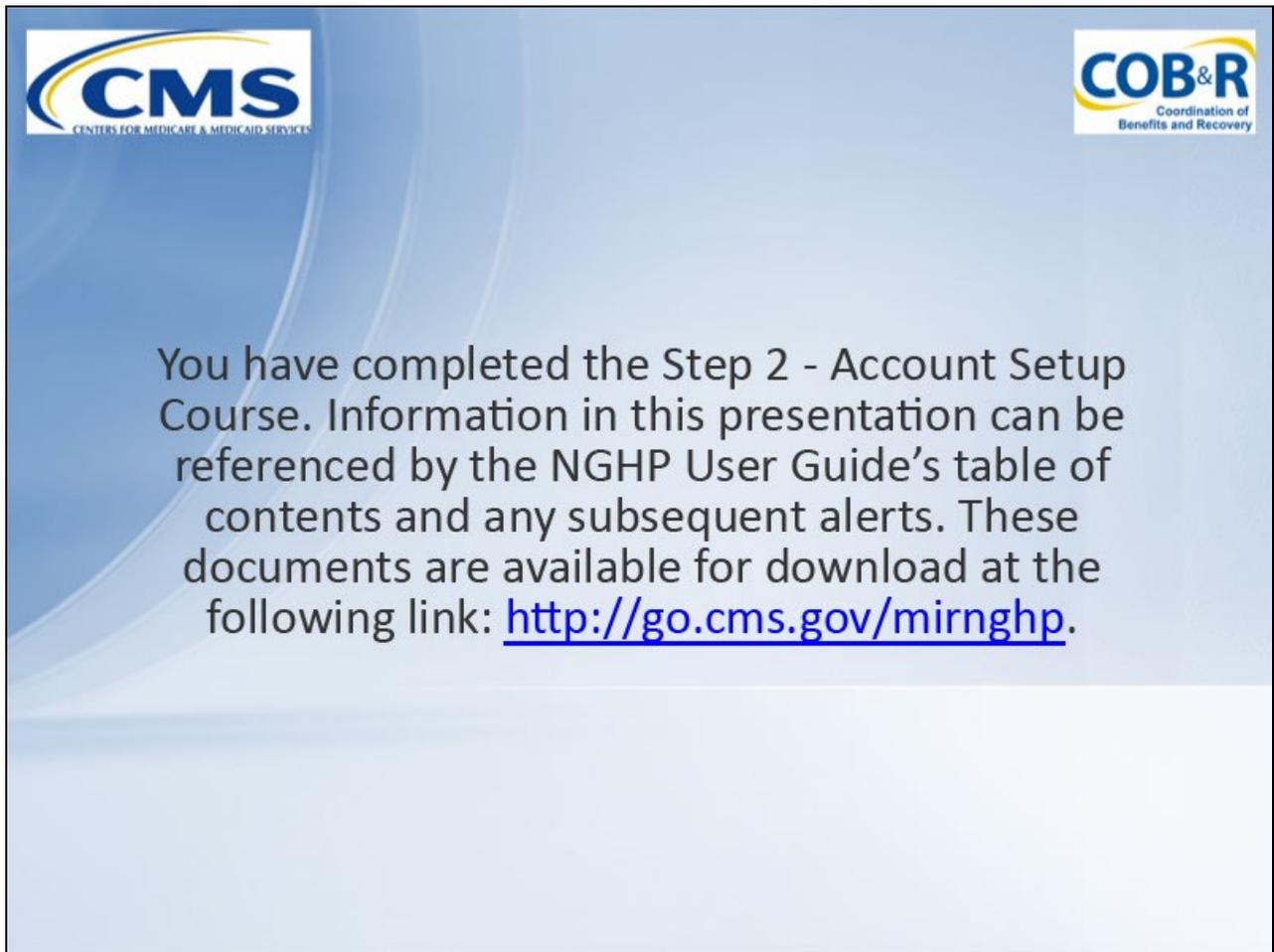
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Section 111 COBSW E-mail Notifications

E-mail notification	Recipient	Purpose
Account Designee Invitation	Account Designee	Sent an Account Designee after the Account Manager for the RRE ID adds the Account Designee to the RRE ID on the Section 111 COBSW. If the Account Designee is a new user, the e-mail will contain an URL with a secure token link for the user to follow to obtain a login ID for the Section 111 COBSW.
Personal Information Changed	User Affected (Account Manager or Account Designee)	Generated after a user changes his/her personal information on the Section 111 COBSW. Informational only.
Password Reset	User Affected (Account Manager or Account Designee)	Generated when a user's Password is reset on the Section 111 COBSW.
Login ID Request	User Affected (Account Manager or Account Designee)	Generated after a user completes the "Forgot Login ID" function on the Section 111 COBSW.

Slide notes

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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: "You have completed the Step 2 - Account Setup Course. Information in this presentation can be referenced by the NGHP User Guide's table of contents and any subsequent alerts. These documents are available for download at the following link: <http://go.cms.gov/mirnghp>."**Slide notes**

You have completed the Step 2 - Account Setup Course. Information in this presentation can be referenced by the NGHP User Guide's table of contents and any subsequent alerts. These documents are available for download at the following link: <http://go.cms.gov/mirnghp>.

Slide 45 - of 45



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Slide notes

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