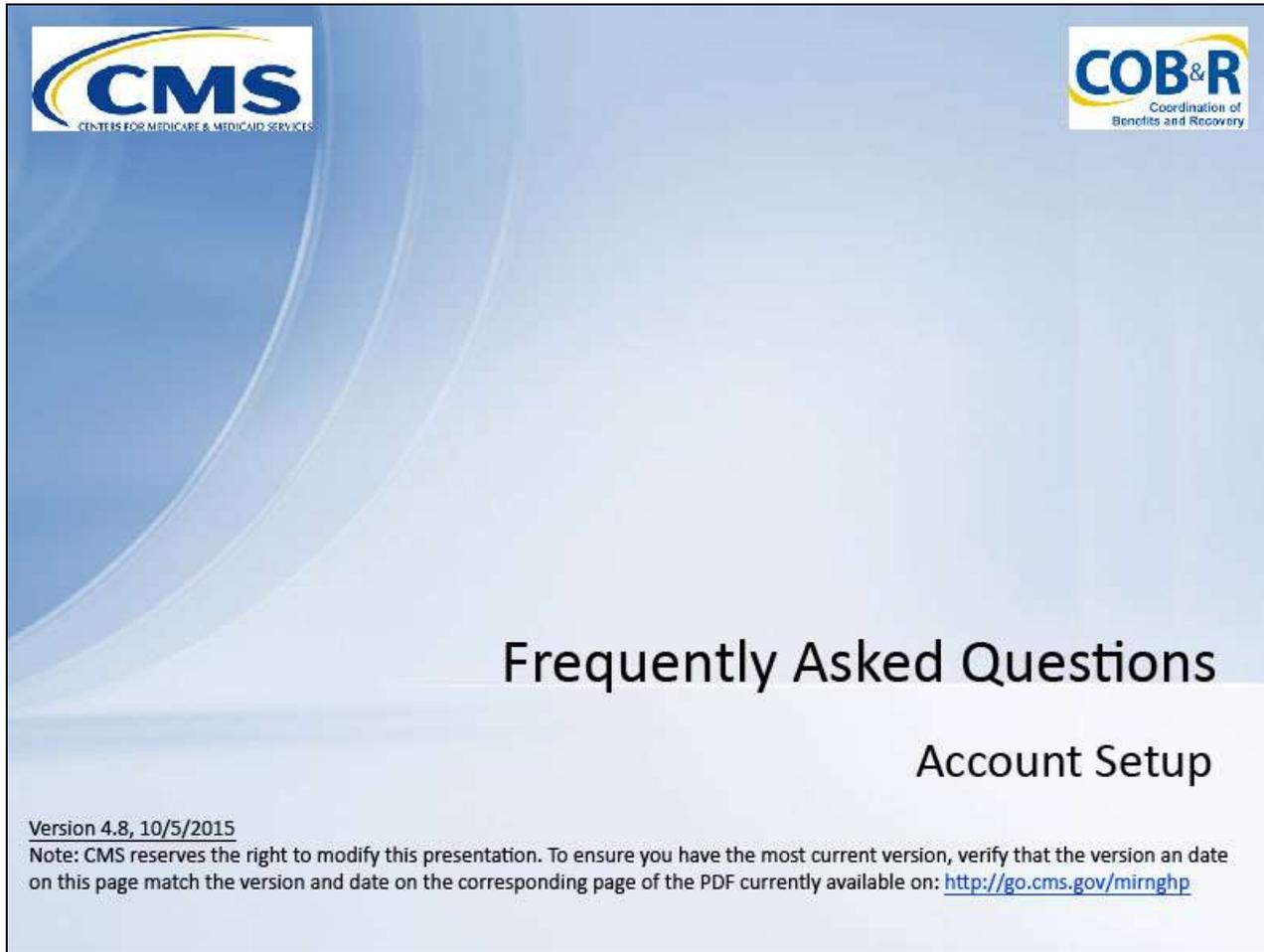


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The slide features a light blue background with a subtle wave pattern. In the top left corner is the CMS logo (Centers for Medicare & Medicaid Services). In the top right corner is the COB&R logo (Coordination of Benefits and Recovery). The main title is centered in a large, black, sans-serif font. Below the title, the version and date are listed, followed by a note and a URL.

CMS
CENTERS FOR MEDICARE & MEDICAID SERVICES

COB&R
Coordination of
Benefits and Recovery

Frequently Asked Questions

Account Setup

Version 4.8, 10/5/2015
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 Account Setup Frequently Asked Questions 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).

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Disclaimer

While all information in this document is believed to be correct at the time of writing, this Computer Based Training (CBT) is for educational purposes only and does not constitute official Centers for Medicare & Medicaid Services (CMS) instructions for the MMSEA Section 111 implementation. All affected entities are responsible for following the instructions found at the following link: <http://go.cms.gov/mirnghp>.

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Frequently Asked Questions Index

- Account Process Slides 4-12, 36-37
- Section 111 COBSW User Roles Slides 11-25
 - Authorized Representative
 - Account Manager
 - Account Designee
 - Agent
- Data Transmission Methods Slides 26-29
- Section 111 COBSW Login and Password Slides 30-31
- Account Setup Troubleshooting Slides 32-35

Slide notes

Account Setup Process; Section 111 Coordination of Benefits Secure Web site (COBSW) User Roles (Authorized Representative, Account Manager, Account Designee, Agent); Data Transmission Methods;

Section 111 COBSW Login and Password; Account Setup Troubleshooting.

Note: Liability insurance (including self-insurance), no-fault insurance and workers' compensation are sometimes collectively referred to as "non-group health plan" or "NGHP". The term NGHP will be used in this CBT for ease of reference.

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What is Account Setup?

- Second step in the RRE registration process
 - After New Registration
- Completed by Account Manager
 - RRE account information
 - Account Manager information
 - Agent information (if applicable)
 - Data transmission method information

Slide notes

Account Setup is the second step in the RRE registration process on the Section 111 COBSW. It is completed after the RRE has completed New Registration and received the RRE ID and Personal Identification Number (PIN).

The Account Manager must complete this step. The application will ask for RRE account information, Account Manager information, agent information (if applicable), and data transmission method information.

For more detail, see the NGHP User Guide Registration Procedure Chapter or the Section 111 COBSW-Step 2-Account Setup course.

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Do I have to complete Account Setup for every RRE ID?

- Yes



Slide notes

Yes, RREs must complete Account Setup for every RRE ID.

Slide 6 - of 38

What information do I need to complete Account Setup?

- RRE ID and associated PIN
- Account Manager will enter personal information including name, job title, address, phone number and e-mail address
- Account information related to expected volume of data to be exchanged under this RRE ID (estimated number of annual paid claims for the lines of business reported under this RRE ID)
- Reporting agent name, address, contact e-mail and TIN
- Data transmission method(s) (file or DDE)
- File transmission information needed if the Connect:Direct transmission method is selected
 - See the NGHP User Guide Technical Information Chapter for more information
 - You must have destination dataset names available if the Connect:Direct method is selected or this step cannot be completed and all the other data you provided will not be saved

Slide notes

You will need your RRE ID and the associated PIN. The Account Manager will enter personal information including name, job title, address, phone number and e-mail address.

Account information related to expected volume of data to be exchanged under this RRE ID (which is the estimated number of annual paid claims for the lines of business reported under this RRE ID).

Reporting agent name, address, contact e-mail and Tax Identification Number (TIN);

Data transmission method(s) (file or DDE); and you will need

File transmission information needed if the Connect:Direct transmission method is selected.

See the NHGP User Guide Technical Information Chapter for more information.

You must have destination dataset names available if the Connect:Direct method is selected or this step cannot be completed and all the other data you provided will not be saved.

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Who can complete Account Setup?

- Only the Account Manager can perform the Account Setup step
 - Obtain Login ID
 - Personally agree to the terms of the User Agreement
- If you need to change your Account Manager after this step, contact your EDI Representative

Slide notes

Only the Account Manager can perform the Account Setup step. In this step, the Account Manager will obtain a Login ID and must personally agree to the terms of the User Agreement.

If you need to change your Account Manager after completing this step, contact your assigned Electronic Data Interchange (EDI) Representative.

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Can the Account Manager delegate Account Setup to another Section 111 COBSW user?

- No, the Account Manager must personally perform the Account Setup step

Slide notes

No, the Account Manager must personally perform the Account Setup.

Slide 9 - of 38

I do not have my Connect:Direct transmission information and was unable to complete the Account Setup. What should I do?

- Obtain information then complete Account Setup
- All data lost from first try
- Cannot save partial setups, must start over

Slide notes

Obtain the information and then complete the Account Setup on the Section 111 COBSW. All data will be lost from your first try. You cannot save partial setups, you must start over.

Slide 10 - of 38

How are EDI Representatives assigned to RRE IDs?

- They are randomly assigned by the system
- If you have registered for multiple RRE IDs and want one EDI Representative, contact one of the EDI Representatives assigned to you, and request a reassignment of all RRE IDs to one EDI Representative

Slide notes

EDI Representatives are randomly assigned by the system. If you have registered for multiple RRE IDs and want one EDI Representative, contact one of the EDI Representatives assigned to you, and request a reassignment of all RRE IDs to one EDI Representative.

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What is meant by the “number of paid claims”? Does it apply to my entire organization or just what I report under this RRE ID?

- Yearly, annual count of paid claims for the line of business reported under this RRE ID
- Just an estimate for sizing purposes, no validation



Slide notes

This is the yearly, annual count of paid claims for the insurance reporting that will be done under this RRE ID. This number is just an estimate for sizing purposes, it will not be validated.

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If I begin the Account Setup or New Registration process and need to stop, will I be able to save my information?

- No
 - Partial registrations or account setups may not be saved and completed later

Slide notes

No, partial registrations or account setups may not be saved and completed later.

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Can an Authorized Representative complete Account Setup (my e-mail address was rejected)?

- No
 - Account Manager must complete Setup
 - In this step, the Account Manager will obtain a Login ID and must personally agree to the terms of the User Agreement
 - Account Manager e-mail address cannot match an Authorized Representative
- Report to Electronic Data Interchange (EDI) Representative if the incorrect Authorized Representative e-mail address was provided during New Registration

Slide notes

No, the Account Manager must complete the Setup. In this step, the Account Manager will obtain a Login ID and must personally agree to the terms of the User Agreement.

The Account Manager e-mail address cannot match that of an Authorized Representative.

Report the problem to your EDI Representative if the incorrect Authorized Representative e-mail address was provided during New Registration.

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I provided the wrong Authorized Representative in the New Registration step (put in the Account Manager instead). What should I do?

- Report to EDI Representative

**Slide notes**

Report the problem to your EDI Representative.

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What is an Account Manager?

- Each RRE ID can only have one Account Manager. This is a user of the Section 111 COBSW who controls the administration of an RRE's account, manages other users associated with the RRE ID and controls the overall reporting process.
 - Must complete the Account Setup step on the Section 111 COBSW and obtain a Login ID
 - Can be associated with another RRE ID if they receive the authorized PIN from the BCRC mailing
 - Controls other users' (Account Designees') access to the RRE ID on the Section 111 COBSW

Slide notes

Each RRE ID can only have one Account Manager. This is a user of the Section 111 COBSW who controls the administration of an RRE's account, manages other users associated with the RRE ID and controls the overall reporting process.

The Account Manager must complete the Account Setup step on the Section 111 COBSW and obtain a Login ID.

The Account Manager can be associated with another RRE ID if they receive the authorized PIN from the Benefits Coordination & Recovery Center (BCRC) mailing.

The Account Manager controls other users' (Account Designees') access to the RRE ID on the Section 111 COBSW.

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What is an Account Manager?

- Manages the RRE ID account information
- Can upload and download files to the Section 111 COBSW via the HTTPS file transfer method
- Can transmit files via the SFTP file transfer method
- Can submit and view claim information if the RRE has specified the DDE option
- Cannot be an Authorized Representative
- Cannot be an Account Designee for the same RRE ID

Slide notes

The Account Manager manages the RRE ID account information. The Account Manager can upload and download files to the Section 111 COBSW via Hypertext Transfer Protocol over Secure Socket Layer (HTTPS)

if the RRE has specified HTTPS as the file transfer method; transmit files via Secure File Transfer Protocol (SFTP) if the RRE has specified SFTP as the file transfer method; and, submit and view claim information if the RRE has specified the DDE option.

The Account Manager can review file transmission status and statistics.

The Account Manager cannot be an Authorized Representative for any RRE ID and cannot be an Account Designee for the same RRE ID.

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When do I identify my Account Manager?

- During Account Setup
 - Enter RRE ID and PIN
 - Enter his/her information
 - Obtain a Login ID

Slide notes

The Account Manager should be identified during the Account Setup step. The Account Manager will enter the RRE ID and PIN and then enter his/her information to obtain a Section 111 COBSW Login ID.

Slide 18 - of 38

We are setting up more than one RRE ID for reporting. Do I *have* to use the same person for the Account Manager? Can I use the same person?

- Same or different - RRE's choice

Slide notes

You may use the same person or a different person. This is the RRE's choice.

Slide 19 - of 38

Can I be the Authorized Representative for one RRE ID and the Account Manager for another?

- No, Authorized Representative cannot be user of Section 111 COBSW for any RRE ID

Can I be the Account Manager for one RRE ID and the Account Designee for another?

- Yes, roles are by RRE ID

Slide notes

No, the Authorized Representative cannot be a user of Section 111 COBSW for any RRE ID.

Can I be the Account Manager for one RRE ID and an Account Designee for another?

Yes, these roles are by RRE ID.

Slide 20 - of 38

What is an Account Designee?

- Account Manager may invite other individuals to register as users of the Section 111 COBSW associated with the RRE ID
- Account Designees assist Account Manager with the reporting process
 - RRE employees or agents
 - No limit to the number of Account Designees associated with RRE ID
 - May be associated with multiple RRE IDs, if invited by an Account Manager
 - Cannot invite other users to the account
 - Cannot update RRE account information
 - For same RRE ID, cannot be
 - Authorized Representative
 - Account Manager

Slide notes

The Account Manager may invite other individuals to register as users of the Section 111 COBSW associated with the RRE ID. Account Designees assist the Account Manager with the reporting process.

Account Designees may be RRE employees or agents.

There is no limit to the number of Account Designees associated with the RRE ID. The Account Designee may be associated with multiple RRE IDs, if invited by an Account Manager. The Account Designee cannot invite other users to the account.

The Account Designee cannot update RRE account information. For the same RRE ID, the Account Designee cannot be the Authorized Representative or Account Manager.

Slide 21 - of 38

Should my agent be my Account Manager or an Account Designee?

- RRE decision based on who should
 - Control account information
 - Manage other users
 - Be responsible for day-to-day reporting issues

Slide notes

This is the RRE's decision based on who should control account information, who should manage other users and who should be responsible for day-to-day reporting issues.

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How do I invite my agent as an Account Designee? How does my agent get a Section 111 COBSW Login ID?

- See “How to Invite Designees” and Help page
- Only Account Manager can invite a Designee
- Account Manager goes to Login page, logs in, sees RRE Listing page, selects Designee Maintenance action next to RRE ID - must invite to *each* RRE ID
- Agent will get e-mail

Slide notes

See “How to Invite Designees” and the Help page. Only the Account Manager can invite a Designee.

The Account Manager will go to the Login page, log in, see the RRE Listing page, select Designee Maintenance action next to the RRE ID – and must invite to each RRE ID. The Agent will receive an e-mail.

Slide 23 - of 38

I don't have my agent's TIN. What should I do?

- Obtain it and complete setup later or complete setup without agent information and add this information later
- Can still invite agents as Account Designees

Slide notes

You can obtain it and complete the setup later or complete the setup without the agent information and add this information later. You can still invite agents as Account Designees.

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What if I'm using more than one agent?

- If under the same RRE ID, put one agent company in Account Setup
 - People from both agents can be added as Designees
- If both will report Claim Input File records on separate files, need 2 RRE IDs and put one agent under each RRE ID

Slide notes

If the agents are under the same RRE ID, put one agent company in the Account Setup. People from both agent companies can be added as Designees.

If both agents will report Claim Input File records on separate files, you will need 2 RRE IDs and put one agent under each RRE ID.

Slide 25 - of 38

My agent wants to receive the Section 111 COBSW e-mails. What should I do?

- Must be an Account Manager to get e-mails
- Account Manager must forward to others

Slide notes

You must be an Account Manager to get e-mails. The Account Manager must forward the e-mails to others.

Slide 26 - of 38

How do I know which data transmission method to use?

- Large files - SFTP, Connect:Direct
 - Must have CMSNet account for Connect:Direct
 - Most costly of the options
- Small files (i.e., less than 24,000 records on a regular basis)
 - HTTPS
- RREs with 500 or less claim reports on a yearly basis
 - May choose to submit claim information using DDE



Slide notes

For large files, you may want to select SFTP or Connect:Direct. You must have a CMSNet account for Connect:Direct. This is the most costly of the options.

For small files (i.e., less than 24,000 records on a regular basis), you may want to use HTTPS.

RREs with very few claim reports (i.e., 500 or less claim reports on a yearly basis) may choose to submit claim information using DDE method on the Section 111 COBSW.

See the NGHP User Guide for more information.

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I don't plan to use the Query File. What should I put for the transmission method?

- Select the same method that was selected for the Claim Input File or default to HTTPS since that's the simplest
- If you decide to use this file later, you can change the file transmission method (if needed) by contacting your EDI Representative

Slide notes

Select the same method that was selected for the Claim Input File or default to HTTPS since that's the simplest. If you decide to use this file later, you can change the file transmission method (if needed) by contacting your EDI Representative.

Slide 28 - of 38

For SFTP, where do I send my files?

- They are sent to a Section 111 COBSW server
- See server address, port and directories in User Guide
- Need credentials
 - Section 111 COBSW Login ID and password for Account Manager or any Account Designee associated with RRE ID

Slide notes

The files are sent to a Section 111 COBSW server. See server address, port and directories in the User Guide.

You will need certain credentials, such as a Section 111 COBSW Login ID and password for the Account Manager or any Account Designee associated with the RRE ID.

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Do I need a different Login ID for each RRE ID I setup?

- No, one Login ID per person

Slide notes

No, you will only need one Login ID per person.

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I got an error saying that my password contains a reserved word? What is that and what should I do?

- A reserved word is a key word used by the Section 111 COBSW that has special meaning within the program and cannot be used in creating a user-defined password
- Please see the list of all reserved words on the Help page

Slide notes

A reserved word is a key word used by the Section 111 COBSW that has special meaning within the program and cannot be used in creating a user-defined password.

Please see the list of all reserved words on the Help page link on the Log In information screen.

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My PIN is locked. How can I reset it (i.e., how can I complete Account Setup)

- Report to an EDI Representative



Slide notes

Report the problem to your EDI Representative.

Slide 32 - of 38

I received an unspecified error during Account Setup. What should I do?

- Report to an EDI Representative
- Capture and send screen print if possible



Slide notes

Report the error to your EDI Representative. Capture and send a screen print if possible.

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I need to change the RRE company information that was entered during New Registration. What should I do?

- Some information can be changed by
 - Account Manager logs into Section 111 COBSW and uses the update RRE function
- Contact EDI Representative to update
 - Authorized Representative
 - Account Manager
 - File transmission method
 - Note: Account Managers can change from the HTTPS or SFTP file submission method to DDE (if the RRE indicated they had less than 500 paid claims per year during registration)

Slide notes

You can change some information later after the Account Setup. The Account Manager can log into the Section 111 COBSW and use the update RRE function.

However, you cannot change the Authorized Representative, the Account Manager, or the file transmission method. You will need to contact your EDI Representative to change these.

Note: Account Managers can change from the HTTPS or SFTP file submission method to DDE (if the RRE indicated they had less than 500 paid claims per year during registration).

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We have not received our profile report.
What should I do?

- Wait 10 business days
- Contact EDI Representative

Slide notes

Wait 10 business days from the completion of account setup to receive the report. If you have not received it, contact your EDI Representative.

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How is the file submission timeframe assigned?

- It is based on parameters supplied during registration (i.e., number of annual paid claims for the line of business reported under this RRE ID)
- Timeframes are assigned in order to spread the BCRC file processing as evenly as possible throughout each quarter

Slide notes

The file submission timeframe is based on parameters supplied during registration (i.e., number of annual paid claims for the line of business reported under this RRE ID).

Timeframes are assigned in order to spread the BCRC file processing as evenly as possible throughout each quarter.

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When can I start testing?

- Return profile report
- The BCRC processes it
- May begin testing Section 111 file
- Once testing is completed, RRE ID will be placed in a production status
 - RRE IDs are expected to move to production status within 180 days after completion of the New Registration step
- No testing is required for the DDE option
 - RRE IDs set to a production status after the signed profile report is received at the BCRC and production reporting may begin immediately thereafter

Slide notes

When you have returned your profile report and the BCRC has processed it, you will be moved into “test status.” Once your profile report has been marked as received by the BCRC, you may begin testing your Section 111 files.

The BCRC will send an e-mail to your Account Manager indicating that testing can begin. 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).

Note: No testing is required for the DDE option. RRE IDs for DDE submitters will be set to a production status after the signed profile report is received at the BCRC and production reporting may begin immediately thereafter.

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