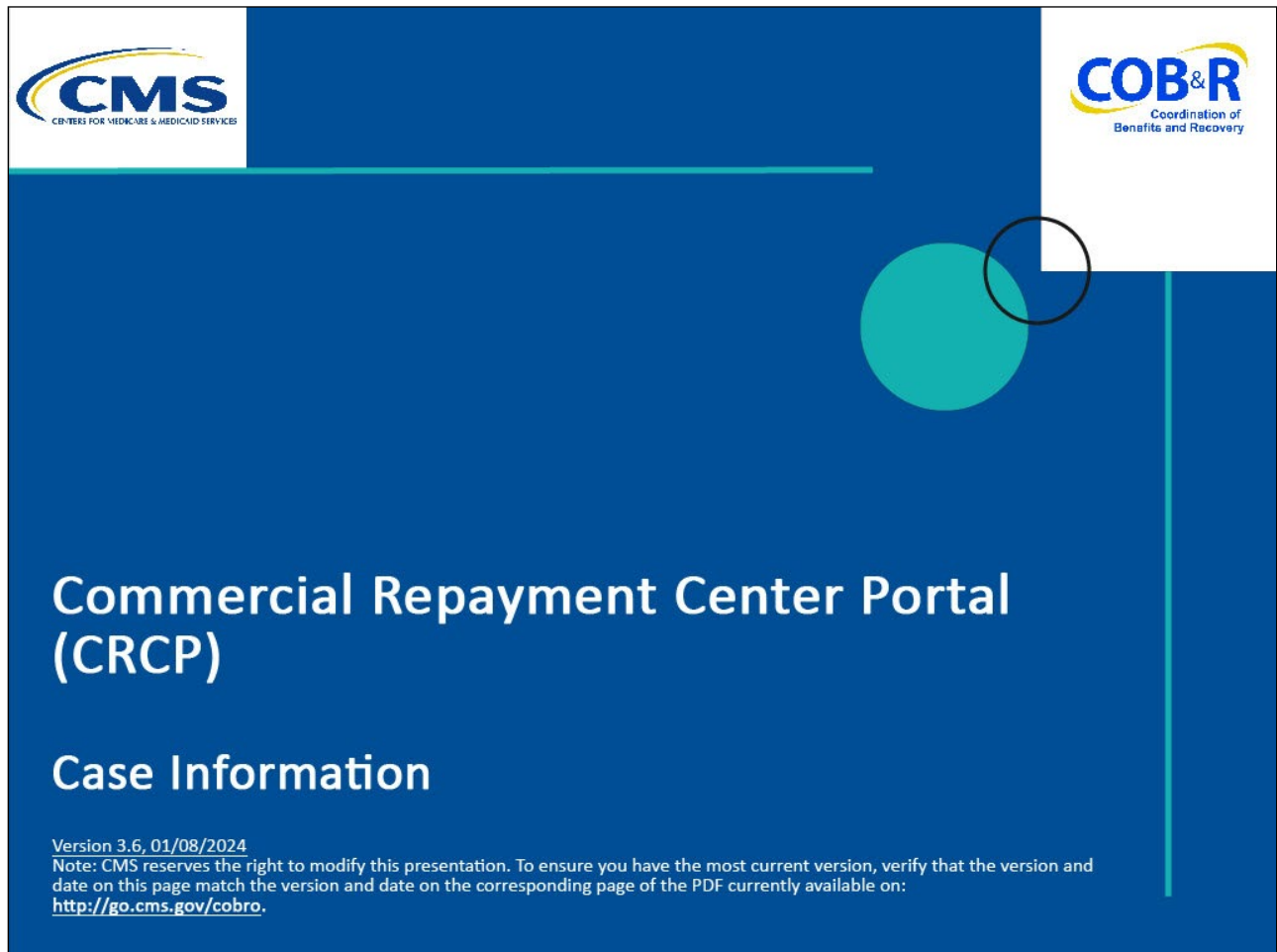


Case Information

Slide 1 of 28 - Case Information



CMS
CENTERS FOR MEDICARE & MEDICAID SERVICES

COB&R
Coordination of
Benefits and Recovery

Commercial Repayment Center Portal (CRCP)

Case Information

Version 3.6, 01/08/2024
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/cobro>.

Slide notes

Welcome to the Commercial Repayment Center Portal (CRCP) Case Information course.

Slide 2 of 28 - 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 in the CRCP User Guide found under the *Reference Materials* menu at the following link:
<https://www.cob.cms.hhs.gov/CRCP/>.

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 in the CRCP User Guide found under the Reference Materials menu at the following link: [CMS CRCP Website](https://www.cob.cms.hhs.gov/CRCP/).

Slide 3 of 28 - Course Overview

Course Overview

- How to view case specific information for a beneficiary included in a demand on the CRCP
 - Beneficiary
 - Demand
 - Employer and Insurer
 - Financial History
 - Correspondence Activity
 - Defense History
 - Submitting Documentation
 - Electronic Payments

**Slide notes**

This course will explain how to view case-specific information for a beneficiary included in a demand on the CRCP.

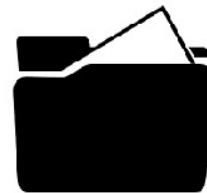
It will describe how to utilize the Case Information page to see the following case-related information:

- Beneficiary
- Demand
- Employer and Insurer
- Financial Summary
- Correspondence Activity
- Defense History
- Electronic Payments
- Submitting Documentation

Slide 4 of 28 - Background

Background

- CRC issues a demand to recover money in cases where Medicare paid primary but the GHP had primary payment responsibility
- A demand generally includes multiple beneficiaries (cases)
- View *CRCP Case Information* page to see information on a particular case that is included in a demand

**Slide notes**

If Medicare paid primary when the Group Health Plan (GHP) had primary payment responsibility, the Commercial Repayment Center (CRC) will seek repayment on behalf of CMS.

When the CRC issues a demand letter for payment, the demand may include multiple beneficiaries/cases.

To review information on a particular beneficiary/case that is included in a demand, you will access the Case Information page on the CRCP.

Slide 5 of 28 - Login Warning Page

Slide notes

To review beneficiary or case information, log into the CRCP at the following link: [CMS CRCP Website](https://www.cob.cms.hhs.gov/CRCP/). The Login Warning page will appear. Click “I Accept” to continue to Login to the CRCP.

Slide 6 of 28 - Welcome to the CRCP Page

The screenshot shows the CRCP Welcome page. At the top is a navigation bar with links: About This Site, CMS Links, How To..., Reference Materials, and Contact Us. The main heading is "Welcome to the CRCP". Below it is a paragraph explaining the portal's purpose. A link for auxiliary aids is provided. A "CRCP Messages" section contains two "ATTENTION" notices. The "Getting Started" section explains registration requirements and defines roles for Authorized Representative and Account Manager. At the bottom, two buttons are shown: "New Registration (PIN Request)" (Step 1) and "Account Setup" (Step 2). A login form on the right side is highlighted with a red box, containing fields for Login ID, Password, and links for "Forgot Login ID" and "Forgot Password", along with "Login" and "Clear" buttons.

Slide notes

The Welcome to the CRCP page will appear along with a section to sign into your account.

Slide 7 of 28 - Account Listing

Skip Navigation | Login ID : [REDACTED] | [Print this page](#)




Commercial Repayment Center Portal

Home | User Options | About This Site | CMS Links | How To... | Reference Materials | Contact Us | Log off

Account Listing [Quick Help](#)

The Account IDs associated to your Login ID are listed on this page. Account IDs with a green leaf (🌿) have opted in to "Go Paperless". These accounts receive letter notification emails instead of mailed letters. You are responsible for viewing all correspondence on the CRCP for "Go Paperless" accounts. Select the Account ID you want to access by clicking the appropriate Account ID link. To view a list of all Tax Identification Numbers (TINs) associated to an Account ID, click the corresponding View TINs Listing link.

Multi-Factor Authentication

Status: **Initial Process**
Next Step: **Getting Started**



Multi-Factor Authentication

CRCP users may request access to view unmasked Medicare beneficiary Protected Health Information (PHI)/Personally Identifiable Information (PII). Individuals requesting this access must complete the ID Proofing and Multi-Factor Authentication (MFA) process. The status of your request will display as a link under the Multi-Factor Authentication box. You will click this link to progress through the required steps. Once you have successfully completed this process your status will be changed to Complete.

During the ID Proofing process, you will be asked to provide current personal information and respond to questions created by Experian Credit Services (an outside entity) to confirm your identity. This information, the questions, and your answers will not be stored on the CRCP. This process will not impact your credit score.

To use MFA services, you will be required to register for a Factor Type (Voice Call and/or Text Message (SMS)) as a method of receiving your security token to access the CRCP application using your MFA Login. When registering for Voice Call, a landline phone or mobile device may be used to receive the security token via phone call. To register for Text Message (SMS) you must register with a mobile phone number to receive your security token via text message. After the Factor registration, you must then activate the Factor for your login ID. You may only have ONE registered or activated phone number per factor type.

You will be able to activate the factor after the Next Step link has changed to Factor Required. To begin the ID Proofing process, click the Next Step: Getting Started link.

Account ID	Company Name	Associated TINs
111111111 	CIGNA	View TINs Listing
222222222	United Health Care	View TINs Listing

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Slide notes

After a successful login, the Account Listing page will appear.

This page lists the accounts associated with your Login ID. Select the Account ID link for the account you want to access.

Note: CRCP users may request access to view unmasked Medicare beneficiary Protected Health Information (PHI)/Personally Identifiable Information (PII). Individuals requesting this access must complete the ID Proofing and Multi-Factor Authentication (MFA) process. The status of your request will display as a link under the Multi-Factor Authentication box. For more information on MFA, see the Multi-Factor Authentication CBT course.

Slide 8 of 28 - Account Detail

The screenshot displays the 'Account Detail' page for Account ID 11111111 - CIGNA. At the top, there are logos for CMS (Centers for Medicare & Medicaid Services) and COB&R (Coordination of Benefits and Recovery). A navigation bar includes links for Home, User Options, Account Settings, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Log off. A 'Print this page' button is also visible. The main content area is titled 'Account Detail' and includes a 'Quick Help' icon. It states that the user has selected Account ID 11111111 - CIGNA and provides instructions on how to access different account IDs. Under the 'Available Actions' section, there are six buttons with associated text: 'Demand Listing' (highlighted with a red box), 'Case Search', 'Request Letter Access', 'Go Paperless', 'Letter Notifications', and 'Open Debt Report'. A 'Previous' button is located at the bottom left. A footer note mentions that to remove access related to a letter, the Account Manager must contact an EDI Representative at the BCRC.

Slide notes

When the Account Detail page appears, click the Demand Listing link.

Note: The Open Debt Report, Go Paperless, and Letter Notifications hyperlinks and associated text is only available for Account Managers.

Slide 9 of 28 - Case Search Page

Demand Listing Quick Help

Unresolved/open demands that were issued in the past three months are listed on this page. To search for any Demand Letter ID, including a demand that has been closed, enter your criteria and then click Search.

Demand Letter ID : Demand Letter ID Search Hint

Demand Letter Sent Date From: / / (MM/DD/YYYY)

Demand Letter Sent Date To: / / (MM/DD/YYYY) From and To Date Search Hint

Demand Letters Issued to Companies Associated with Account ID: 111111 Results Returned: 5

You may view a list of Beneficiaries/Case ID's included in a Demand Letter as long as the Status is Open. To view this list, click the Demand Letter ID link for the applicable letter. If you need additional information regarding a demand that has been resolved/closed, please contact the Commercial Repayment Center at 1-855-798-2627.

Viewed	Demand Letter ID	Number of Cases	Letter Date	Demand Status
Yes	86123455	1	04/13/2014	Open
Yes	86123454	1	04/11/2014	Open
Yes	86123453	1	04/10/2014	Open
No	86123452	1	04/09/2014	Open
	86123451	1	04/08/2014	Closed

[Account Detail](#)

Slide notes

The Demand Listing page appears. By default, this page lists all unresolved/open demands that the CRC has issued in the past three months.

You may search for any Demand Letter ID using the Search function. See the “Demands” CBT for more information.

Note: No more than 100 letters will display at any given time.

To view case specific information, first locate the Demand Letter ID that includes the case you want to examine and then click the Demand Letter ID link. Note: This link will only be enabled if the Demand Status is ‘Open’.

You will not be able to view beneficiary/case information if the Demand Status is ‘Closed’. The Demand Status is ‘Closed’ when the status of each case included in a Demand Letter ID is ‘Closed’.

If you need information regarding a demand that has been closed, contact the CRC at 1-855-798-2627.

Slide 10 of 28 - Case Search Results

Home User Options Account Settings About This Site CMS Links How To... Reference Materials Contact Us Log off

Demand Detail [Quick Help](#)

You have selected Demand Letter ID: 861236547.

The Total Demand Amount originally included on this letter was:		\$51,100.45	
Employer Name:	BLUE CROSS	Insurer Name:	CIGNA
Employer TIN:	12336544	Insurer TIN:	2234567897

To search for a specific Case ID/beneficiary included in this Demand Letter, enter your criteria, and then click Search. Once located, click the Case ID link to view detailed information for that case.

Case ID: [Case ID Search Hint](#)

Medicare ID: [Medicare ID Search Hint](#)

Beneficiary Last Name: [Beneficiary Last Name Search Hint](#)

Case IDs/Beneficiaries Included in the Demand Letter Results Returned: 5

Case ID	Claim Count	Medicare ID	Beneficiary First Name	Beneficiary Last Name	Case Demand Amount	Case Status	Date Closed	Case Viewed	Treasury Referral Date	Treasury Account Number	Current Status of Debt
C1234560001	133	****1234A	Mike	Lansing	\$4,400.00	Open		No	01/22/2019	2131	Debt Referred to Treasury
C1234560002	13	****2345A	John	Bosely	\$15,400.00	Open		No			
C1234560003	83	****4456A	Elizabeth	Florence	\$16,900.00	Open		Yes	02/27/2019	A2582	Intent to Refer Letter Sent
C1234560004	23	****2244A	Frances	Christobell	\$400.00	Open		Yes			
C1234560005	283	****3365A	Blaxton	Jasper	\$14,000.00	Closed	05/10/2016	Yes	04/24/2018	N2588	Debt Recalled from Treasury (Referral Exemption)

[Demand Listing](#) [Make a Payment](#) [Submitted Defenses](#)

Slide notes

Once you click the Demand Letter ID link, the Demand Detail page appears.

Slide 11 of 28 - Demand Detail Page

Home
User Options ▾
Account Settings ▾
About This Site ▾
CMS Links ▾
How To... ▾
Reference Materials ▾
Contact Us
Log off

Quick Help

Demand Detail

You have selected Demand Letter ID: 861236547.

The Total Demand Amount originally included on this letter was:		\$51,100.45	
Employer Name:	BLUE CROSS	Insurer Name:	CIGNA
Employer TIN:	12336544	Insurer TIN:	2234567897

To search for a specific Case ID/beneficiary included in this Demand Letter, enter your criteria, and then click Search. Once located, click the Case ID link to view detailed information for that case.

Case ID: [Case ID Search Hint](#)

Medicare ID: [Medicare ID Search Hint](#)

Beneficiary Last Name: [Beneficiary Last Name Search Hint](#)

Case IDs/Beneficiaries Included in the Demand Letter Results Returned: 5

Case ID	Claim Count	Medicare ID	Beneficiary First Name	Beneficiary Last Name	Case Demand Amount	Case Status	Date Closed	Case Viewed	Treasury Referral Date	Treasury Account Number	Current Status of Debt
C1234560001	133	*****1234A	Mike	Lansing	\$4,400.00	Open		No	01/22/2019	2131	Debt Referred to Treasury
C1234560002	13	*****2345A	John	Bosely	\$15,400.00	Open		No			
C1234560003	83	*****4456A	Elizabeth	Florence	\$16,900.00	Open		Yes	02/27/2019	A2582	Intent to Refer Letter Sent
C1234560004	23	*****2244A	Frances	Christobell	\$400.00	Open		Yes			
C1234560005	283	*****3365A	Blaxton	Jasper	\$14,000.00	Closed	05/10/2016	Yes	04/24/2018	N2588	Debt Recalled from Treasury (Referral Exemption)

Demand Listing
Make a Payment
Submitted Defenses

Slide notes

The bottom portion of this page lists all of the beneficiaries/Case IDs included in the demand letter.

For each beneficiary included in the demand, a masked Medicare ID is displayed along with the Beneficiary Name, Case Amount, Case Status, Date Closed, and Case Viewed fields.

A Case Viewed column was added to this page to help identify when new Demands have been added to the account and a Treasury Referral Date, Treasury Account Number, and Current Status of Debt fields have also been added to provide additional treasury information.

The Make a Payment button and the Submitted Defenses button also display on the Demand Detail page.

Click a Case ID link to view detailed case information for the selected case.

Slide 12 of 28 - Case Information

The screenshot shows a web interface for Case Information. At the top, there is a navigation bar with links: Home, User Options, Account Settings, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Log off. Below this is the 'Case Information' header with a 'Quick Help' icon. The main content area contains a paragraph explaining the information is related to Case ID: 11111111 and Demand Letter ID: 123456789, with links for Demand Detail, Demand Listing, Case Search, View/Submit Defense, and Submit Documentation. A note states the information is current as of 12/09/2013. The 'Case Details' section is divided into four tables: Beneficiary Information, Demand Information, Employer Information, and Insurer Information. Below these is a 'Financial Summary' section with a table of financial data and a row of buttons: Demand Detail, Demand Listing, Case Search, View/Submit Defense, and Submit Documentation.

Case Information

The information displayed on this page is related to **Case ID: 11111111** which is included on **Demand Letter ID: 123456789**. Click **Demand Detail** to go to the *Demand Detail* page. Click **Demand Listing** to go to the *Demand Listing* page. Click **Case Search** to search for any Case ID/Beneficiary associated to your Account. Click **View/Submit Defense** to submit a new defense for this case or view defenses previously submitted for claims/lines associated to this case.

Please note: The information displayed on these pages is current as of: 12/09/2013.

Case Details

Beneficiary Information		Demand Information	
Beneficiary Name:	Joe W. Smith	Total Demand Amount:	\$51,100.45
Medicare ID:	*****9099A	Claim Count:	45
Insurance Group ID:	A122345678	Case Demand Amount:	\$2,300.99
Insurance Policy ID:	Not on File	Case Status:	Demand Issued
Date MSP Record Accepted by CMS:	11/12/2017	Date Closed:	11/12/2018

Employer Information		Insurer Information	
Employer Name:	Blue Cross	Insurer Name:	Not on File
Employer TIN:	0243567899	Insurer TIN:	Not on File

Financial Summary Electronic Payment History Correspondence Activity Defense History

Account Receivable Date:	12/01/2017	Interest Rate:	0.10125
Case Outstanding Balance:	\$11,100.00	Interest Start Date:	01/17/2018
Principal Collected:	\$1100.00	Interest Accrued:	\$155.45
Remaining Principal Balance Amount:	\$8,971.40	Interest Collected:	(\$450.67)
Adjusted Amount:	\$0.00	Remaining Interest Balance Amount:	\$145.79
Treasury Referral Date:		Balance as of Date:	03/09/2018
Treasury Account Number:			
Current Status of Debt:			

Demand Detail **Demand Listing** **Case Search** **View/Submit Defense** **Submit Documentation**

Slide notes

The Case Information page appears. The Case ID and Demand Letter ID are shown at the top of the page. If you have selected the incorrect Case ID, click Previous to return to the Demand Detail page.

All information included on the Case Information page is current as of the date noted at the top of the page. If you have any questions regarding the information included on this page, please contact the CRC at 1-855-798-2627.

The Case Details section of this page is broken into four sections: Beneficiary, Demand, Employer, and Insurer Information. The Beneficiary Information section includes the Beneficiary’s Name, masked Medicare ID, Insurance Group ID, Insurance Policy ID, and Date MSP Record Accepted by CMS.

The Demand Information section includes the Total Demand Amount, Claim Count, Case Demand Amount, Case Status, and Date Closed.

The Employer Information and Insurer Information sections include the company name and Tax Identification Number (TIN) for the employer and the insurer (if it is available).

Note: If there is no data to display for a particular field in the Case Details section, the CRCP will show the phrase ‘Not on File’.

The bottom half of Case Information page includes tabbed sections where you can view information regarding the Financial Summary, Electronic Payment History, Correspondence Activity, and Defense History for the case.

Note: Links/buttons have been added to Case Information Page for easy access to the Demand Listing page, Case Search page and View/Submit Defenses. Also, certain fields on the Make a Payment and on the Financial Summary Tab on the Case Information pages will now show data reported in real-time from HIGLAS. Additionally, updates have been made to clarify that balance amounts on the Open Debt Report may not reflect recent adjustments and may differ from what is shown on the CRCP case pages.

Slide 13 of 28 - Financial Summary Tab

Home User Options Account Settings About This Site CMS Links How To... Reference Materials Contact Us Log off

Case Information [Quick Help](#)

The information displayed on this page is related to Case ID: 111111111 which is included on Demand Letter ID: 123456789. Click **Demand Detail** to go to the *Demand Detail* page. Click **Demand Listing** to go to the *Demand Listing* page. Click **Case Search** to search for any Case ID/Beneficiary associated to your Account. Click **View/Submit Defense** to submit a new defense for this case or view defenses previously submitted for claims/lines associated to this case.

Please note: The information displayed on these pages is current as of: 12/09/2013.

Case Details

Beneficiary Information		Demand Information	
Beneficiary Name:	Joe W. Smith	Total Demand Amount:	\$51,100.45
Medicare ID:	*****9099A	Claim Count:	45
Insurance Group ID:	A122345678	Case Demand Amount:	\$2,300.99
Insurance Policy ID:	Not on File	Case Status:	Demand Issued
Date MSP Record Accepted by CMS:	11/12/2017	Date Closed:	11/12/2018

Employer Information		Insurer Information	
Employer Name:	Blue Cross	Insurer Name:	Not on File
Employer TIN:	0243567899	Insurer TIN:	Not on File

Financial Summary [Electronic Payment History](#) [Correspondence Activity](#) [Defense History](#)

Account Receivable Date:	12/01/2017	Interest Rate:	0.10125
Case Outstanding Balance:	\$11,100.00	Interest Start Date:	01/17/2018
Principal Collected:	\$1100.00	Interest Accrued:	\$155.45
Remaining Principal Balance Amount:	\$8,971.40	Interest Collected:	(\$450.67)
Adjusted Amount:	\$0.00	Remaining Interest Balance Amount:	\$145.79
Treasury Referral Date:		Balance as of Date:	03/09/2018
Treasury Account Number:			
Current Status of Debt:			

[Demand Detail](#) [Demand Listing](#) [Case Search](#) [View/Submit Defense](#) [Submit Documentation](#)

Slide notes

The Financial Summary tab shows the Account Receivable Date, Case Outstanding Balance, Principal Collected, Remaining Principal Balance Amount, Adjusted Amount, Treasury Referral Date, Treasury Account Number, Current Status of Debt, Interest Rate, Interest Start Date, Interest Accrued, Interest Collected, Remaining Interest Balance Amount, and Balance as of Date for the case.

When the Account Receivable balance goes to zero for a case, the Principal Collected, Adjusted Amount, Interest Accrued, and Interest Collected will display zero in these fields. All other fields will remain unchanged.

Note: The Financial Summary tab now includes three fields that show real-time data from HIGLAS.

Slide 14 of 28 - Electronic Payment History Tab

Case Information

The information displayed on this page is related to Case ID: 111111111 which is included on Demand Letter ID: 123456789. Click [Demand Detail](#) to go to the Demand Detail page. Click [Demand Listing](#) to go to the Demand Listing page. Click [Case Search](#) to search for any Case ID/Beneficiary associated to your Account. Click [View/Submit Defense](#) to submit a new defense for this case or view defenses previously submitted for claims/lines associated to this case.

Please note: The information displayed on these pages is current as of: 12/09/2013.

[Quick Help](#)

Case Details

Beneficiary Information		Demand Information	
Beneficiary Name:	Joe W. Smith	Total Demand Amount:	\$51,100.45
Medicare ID:	*****9099A	Claim Count:	45
Insurance Group ID:	A122345678	Case Demand Amount:	\$2,300.99
Insurance Policy ID:	Not on File	Case Status:	Demand Issued
Date MSP Record Accepted by CMS:	11/12/2017	Date Closed:	11/12/2018

Employer Information		Insurer Information	
Employer Name:	Blue Cross	Insurer Name:	Not on File
Employer TIN:	0243567899	Insurer TIN:	Not on File

Financial Summary |
 Electronic Payment History |
 Correspondence Activity |
 Defense History

Remaining Principal Amount: \$2,500.00
 Remaining Interest Amount: \$0.00
 Total Remaining Balance Amount: \$2,500.00

When the payment process at Pay.gov has finalized and the Pay.gov Status is **Accepted**, your payment will be processed by the CRC and applied to the remaining balance. The remaining balance amounts will not reflect your payment until the Demand Balance Status is **Complete**.

Payment Date	Payment Method	Account Holder Name	Payment Amount	Pay.gov Payment Status	Pay.gov Confirmation Number	Demand Balance Status	Demand Balance Update Date
06/10/2019	ACH	Jack Johnson	\$2,500.00	Accepted	33333333	In Process	
05/01/2019	PayPal	Jack Johnson	\$1,000.00	Accepted	22222222	Complete	05/07/2019
05/01/2019	Debit Card	Jack Johnson	\$1,000.00	Declined	11111111		

Note: Only payments made electronically will display on this page. To verify if a paper check was received, please click the Correspondence Activity tab.

Demand Detail |
 Demand Listing |
 Case Search |
 View/Submit Defense |
 Submit Documentation

Slide notes

The Electronic Payment History Tab shows the Remaining Principle Amount, Remaining Interest Amount, and Total Remaining Balance Amount. Additionally, the [Pay.gov](#) Payment Date, Payment Method, Account Holder Name, Payment Amount, Pay.gov. Payment Status, Pay.gov. Confirmation Number, Demand Balance Status, and demand balance Update Date are displayed.

Click any column heading to sort the information displayed. Click Previous at any time to return to the Demand Detail page.

Slide 15 of 28 - Correspondence Activity Tab

Case Information

The information displayed on this page is related to Case ID: 111111111 which is included on Demand Letter ID: 123456789. Click [Demand Detail](#) to go to the Demand Detail page. Click [Demand Listing](#) to go to the Demand Listing page. Click [Case Search](#) to search for any Case ID/Beneficiary associated to your Account. Click [View/Submit Defense](#) to submit a new defense for this case or view defenses previously submitted for claims/lines associated to this case.

Please note: The information displayed on these pages is current as of: 12/09/2013.

[Quick Help](#)

Case Details

Beneficiary Information	
Beneficiary Name:	Joe W. Smith
Medicare ID:	*****9099A
Insurance Group ID:	A122345678
Insurance Policy ID:	Not on File
Date MSP Record Accepted by CMS:	11/12/2017

Employer Information	
Employer Name:	Blue Cross
Employer TIN:	0243567899

Demand Information	
Total Demand Amount:	\$51,100.45
Claim Count:	45
Case Demand Amount:	\$2,300.99
Case Status:	Demand Issued
Date Closed:	11/12/2018

Insurer Information	
Insurer Name:	Not on File
Insurer TIN:	Not on File

Financial Summary
Electronic Payment History
Correspondence Activity
Defense History

Select the correspondence option you wish to view:

All Correspondence
 Correspondence Received
 Correspondence Sent

Correspondence ID	Correspondence Type	Uploaded Document Name	Date Received	Date Sent	Status	Status Date
86620372	Check	Doc.pdf		03/01/2016	Open	03/01/2016
86670372	Defense Request	sometfile.pdf		03/01/2001	Closed	03/01/2001
86620772	Status Request	sample.pdf	03/01/2019		Open	03/01/2017
86620362	Bankruptcy Notification	one.pdf	03/01/2010		Open	03/01/2017

Demand Detail
Demand Listing
Case Search
View/Submit Defense
Submit Documentation

Slide notes

The Letter Activity tab shows all incoming and outgoing correspondence related to the Case ID, except correspondence related to a defense.

For correspondence sent to the CRC, you will see the Document ID (in the Correspondence ID column), date received at the CRC, and the letter description.

For correspondence that the CRC has sent, you will see the Letter ID (in the Correspondence ID column), the date sent from the CRC, and the letter description. Click on any column heading to sort the information displayed.

To view correspondence related to a defense, click the Defense History tab.

Slide 16 of 28 - Defense History Tab

Case Information

The information displayed on this page is related to Case ID: 111111111 which is included on Demand Letter ID: 123456789. Click [Demand Detail](#) to go to the Demand Detail page. Click [Demand Listing](#) to go to the Demand Listing page. Click [Case Search](#) to search for any Case ID/Beneficiary associated to your Account. Click [View/Submit Defense](#) to submit a new defense for this case or view defenses previously submitted for claims/lines associated to this case.

Please note: The information displayed on these pages is current as of: 12/09/2013.

[Quick Help](#)

Case Details

Beneficiary Information	
Beneficiary Name:	Joe W. Smith
Medicare ID:	*****9099A
Insurance Group ID:	A122345678
Insurance Policy ID:	Not on File
Date MSP Record Accepted by CMS:	11/12/2017

Employer Information	
Employer Name:	Blue Cross
Employer TIN:	0243567899

Demand Information	
Total Demand Amount:	\$51,100.45
Claim Count:	45
Case Demand Amount:	\$2,300.99
Case Status:	Demand Issued
Date Closed:	11/12/2018

Insurer Information	
Insurer Name:	Not on File
Insurer TIN:	Not on File

[Financial Summary](#)
[Electronic Payment History](#)
[Correspondence Activity](#)

[Defense History](#)

Defenses submitted on the CRCP or received in the mail for the selected Case ID are listed below.

Document ID	Defense Number	Defense Type	Defense Received	Decision	Decision Date	Viewed
88123854	21445587	EMP	01/02/2014	Partial	02/24/2014	No
88123444	21445583	COV	01/03/2014	Invalid	02/22/2014	Yes
88123834	21445287	COV	03/22/2014	Pending Review		

Demand Detail

Demand Listing

Case Search

View/Submit Defense

Submit Documentation

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Slide notes

The Defense History tab lists information regarding defenses that you have submitted through the CRCP as well as those defenses you have sent to the CRC by mail for the selected Case ID.

For each defense you have submitted, the Document ID, Defense Number, and Defense Received date is shown. The Defense Number is the number assigned by the CRC to your defense correspondence.

The Defense Received date is the date the CRC received the incoming defense correspondence. If the CRC has responded to your defense, the decision is displayed in the Decision (Outgoing Response) column for the selected case.

The date the CRC made the decision will also be shown.

Until the CRC makes a decision regarding the defense, a value of 'Pending' will be displayed in the Decision column and the Decision Date will be blank. You can sort the information by clicking any column heading.

Slide 17 of 28 - Submit Documentation Button

Case Information [Quick Help](#)

The information displayed on this page is related to Case ID: 111111111 which is included on Demand Letter ID: 123456789. Click [Demand Detail](#) to go to the Demand Detail page. Click [Demand Listing](#) to go to the Demand Listing page. Click [Case Search](#) to search for any Case ID/Beneficiary associated to your Account. Click [View/Submit Defense](#) to submit a new defense for this case or view defenses previously submitted for claims/lines associated to this case.

Please note: The information displayed on these pages is current as of: 12/09/2013.

Case Details

Beneficiary Information		Demand Information	
Beneficiary Name:	Joe W. Smith	Total Demand Amount:	\$51,100.45
Medicare ID:	*****9099A	Claim Count:	45
Insurance Group ID:	A122345678	Case Demand Amount:	\$2,300.99
Insurance Policy ID:	Not on File	Case Status:	Demand Issued
Date MSP Record Accepted by CMS:	11/12/2017	Date Closed:	11/12/2018

Employer Information		Insurer Information	
Employer Name:	Blue Cross	Insurer Name:	Not on File
Employer TIN:	0243567899	Insurer TIN:	Not on File

[Financial Summary](#)
 [Electronic Payment History](#)
 [Correspondence Activity](#)
 [Defense History](#)

Defenses submitted on the CRCP or received in the mail for the selected Case ID are listed below.

Document ID	Defense Number	Defense Type	Defense Received	Decision	Decision Date	Viewed
88123854	21445587	EMP	01/02/2014	Partial	02/24/2014	No
88123444	21445583	COV	01/03/2014	Invalid	02/22/2014	Yes
88123834	21445287	COV	03/22/2014	Pending Review		

[Demand Detail](#)
 [Demand Listing](#)
 [Case Search](#)
 [View/Submit Defense](#)
 [Submit Documentation](#)

[What is This?](#)

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Slide notes

To submit additional case documentation for a case or defense, click the Submit Documentation button.

Slide 18 of 28 - Submit Case Documentation Page

Skip Navigation | Login ID : [redacted] | [Print this page](#)

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Submit Case Documentation [Quick Help](#)

An asterisk (*) indicates a required field.

Please select the **Document Type** which best describes the type of document you wish to submit to the CRC for Case ID: 201807108011219 . You can submit multiple Document Types and related documentation in the same submission. To do this, select the applicable **Document Type** and upload the related documentation. When you return to this page, select the next **Document Type** and upload that related documentation. Repeat this process until you are done. **Note:** This functionality cannot be used to submit a new defense for a claim/line item. You will only be permitted to submit additional defense documentation for a previous defense if that defense is pending a CRC decision. To submit a new defense, click the **Submit Defense** button on the Case Information page.

Document Type: Select

- Select
- Additional Defense Documentation**
- Authorization Correspondence
- Payment Correspondence
- Refund Request
- Status Inquiry/Other

To upload documentation, please click here: [Upload Documentation](#)

Click **Continue** to proceed with your submission. Click **Cancel** to return to the Case Information page without submitting any documents.

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Slide notes

The Submit Case Documentation page will appear. Select the Document Type from the drop-down menu that best describes the type of document you wish to submit to the CRC for the selected Case ID. You can submit multiple Document Types in the same submission. To do this, select the first Document type and upload the related documentation. You will return back to this page, and you can select the next Document Type and upload documentation for it as well.

To upload your documentation, click the Upload Documentation link.

Slide 19 of 28 - Case Documentation Upload Page

The screenshot shows the 'Case Documentation Upload' page. At the top, there are logos for CMS (Centers for Medicare & Medicaid Services) and COB&R (Coordination of Benefits and Recovery). A navigation bar includes links for Home, User Options, Account Settings, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Log off. The main content area is titled 'Case Documentation Upload' and includes a 'Quick Help' link. Below the title, there is a paragraph of instructions: 'Please click Choose File to find the document(s) that relate to the Document Type: "Additional Defense Documentation" selected on the previous page for Case ID:201807108011219. Where possible, please combine all documents for the same document type into one file prior to upload. Each uploaded document must be in .PDF or .TIF format, cannot be larger than 40MB (megabytes), cannot be encrypted, must be virus free, the filename must be 80 characters or less and the filename cannot include spaces.' Below this text are five rows, each containing a 'Choose File' button and the text 'No file chosen'. At the bottom of the main content area, there is a paragraph: 'Click Continue to upload the document(s). Click Cancel to return to the Submit Case Documentation page without uploading any documents.' Below this are 'Cancel' and 'Continue' buttons. A footer bar contains links for CMS/HHS Vulnerability Disclosure Policy, Privacy Policy, User Agreement, and Adobe Acrobat.

Slide notes

Click the Choose File button to search for the related document. Where possible, please combine all documents for the same document type into one file prior to upload. Each uploaded document must be in .PDF or .TIF format and cannot be larger than 40MG. Files cannot be encrypted and must be virus free. The filename must be 80 characters or less and cannot include spaces.

Once you have selected your document(s), click Continue. Click Cancel to return to the Submit Case Documentation page without uploading any documents.

Slide 20 of 28 - Submit Case Documentation - Documents Attached

Skip Navigation | Login ID : [redacted] | [Print this page](#)

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Submit Case Documentation [Quick Help](#)

An asterisk (*) indicates a required field.

Please select the **Document Type** which best describes the type of document you wish to submit to the CRC for Case ID: 201807108011219 . You can submit multiple Document Types and related documentation in the same submission. To do this, select the applicable **Document Type** and upload the related documentation. When you return to this page, select the next **Document Type** and upload that related documentation. Repeat this process until you are done. **Note:** This functionality cannot be used to submit a new defense for a claim/line item. You will only be permitted to submit additional defense documentation for a previous defense if that defense is pending a CRC decision. To submit a new defense, click the **Submit Defense** button on the Case Information page.

Document Type:

To upload documentation for the selected **Document Type**, please click here: [Upload Documentation](#)

Below is a list of documents to be submitted to the CRC. If you would like to delete a document from the list, click the Delete link to the right of the document name.

Document Name	Document Type	
test.pdf	Authorization Correspondence	Delete
test2.pdf	Additional Defense Documentation	Delete

Click **Continue** to submit the uploaded documents and receive confirmation. Click **Cancel** to return to the Case Information page without submitting any documents.

Slide notes

The Submit Case Documentation page will redisplay with a list of documents you have selected to be submitted to the CRC. Review the documents in the lists before continuing. If you would like to delete a document from the list, click the Delete link to the right of the document name.

If all documents appear to be correct, click Continue to submit the uploaded documents and receive confirmation.

Slide 21 of 28 - Case Documentation Submission Confirmation Page

The screenshot shows the 'Case Documentation Submission Confirmation' page. At the top, there are logos for CMS (Centers for Medicare & Medicaid Services) and COB&R (Coordination of Benefits and Recovery). A navigation bar includes links for Home, User Options, Account Settings, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Log off. The main content area features a title, a confirmation message, a table of submitted documents, and a 'Continue' button. A footer contains links to CMS/HHS Vulnerability Disclosure Policy, Privacy Policy, User Agreement, and Adobe Acrobat.

Skip Navigation | Login ID : [REDACTED] | [Print this page](#)

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Case Documentation Submission Confirmation [Quick Help](#)

You have successfully submitted the information displayed on this page for Case ID: 201807108011219.

Document Name	Document Type	Correspondence ID	Submitted Date
test.pdf	Authorization Correspondence	1234565	06/14/2023
test2.pdf	Authorization Correspondence	1234565	06/14/2023

Click [Continue](#) to return to the *Case Information* page.

[Continue](#)

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Slide notes

The Case Documentation Submission Confirmation page will appear stating that the documents have been submitted successfully for your case. Click Continue to return to the Case Information page.

Slide 22 of 28 - Account Detail - Case Search Link

The screenshot displays the 'Account Detail' page for account ID 11111111 - CIGNA. At the top, there are logos for CMS (Centers for Medicare & Medicaid Services) and COB&R (Coordination of Benefits and Recovery). A navigation bar includes links for Home, User Options, Account Settings, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Log off. The main content area is titled 'Account Detail' and includes a 'Quick Help' icon. Below the title, it states: 'You have selected Account ID: 11111111 - CIGNA'. It explains that information associated with this ID will be presented on applicable pages and provides instructions on how to access these pages. A section titled 'Available Actions' contains six buttons with descriptions and links: 'Demand Listing', 'Case Search' (highlighted with a red box), 'Request Letter Access', 'Go Paperless', 'Letter Notifications', and 'Open Debt Report'. At the bottom left, there is a 'Previous' button. A footer note mentions that to remove access related to a letter, the Account Manager must contact an EDI Representative at the BCRC, with contact information provided.

Slide notes

You now also have the option to perform a direct search for a case associated to your account and access the Case Information page. From the Account Detail page, click the Case Search link.

Slide 23 of 28 - Case Search Page

The screenshot shows the 'Case Search' page of the CMS Commercial Repayment Center Portal. At the top, there are logos for CMS (Centers for Medicare & Medicaid Services) and COB&R (Coordination of Benefits and Recovery). Navigation links include Home, User Options, Account Settings, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Log off. A 'Skip Navigation' link and a 'Login ID' field are also present. The main content area is titled 'Case Search' and includes a 'Quick Help' link. Below the title, there is a paragraph of instructions: 'To search for a specific case associated to this Account ID, enter a Case ID, and then click Search. Once located, click the Case ID link to view detailed information for that case. You can also click the Demand ID link to view the Demand Detail page for the selected demand. Click Cancel to return to the Account Detail page.' A search form is highlighted with a red border, containing a 'Case ID:' label, an input field, a 'Case ID Search Hint' link, and a 'Search' button. Below the form is a 'Cancel' button. At the bottom of the page, there is a footer with links to 'CMS/HHS Vulnerability Disclosure Policy', 'Privacy Policy', 'User Agreement', and 'Adobe Acrobat'.

Slide notes

From the Case Search page, you can enter a Case ID and click Search.

Slide 24 of 28 - Case Search Results Page

Skip Navigation | Login ID : [redacted] | [Print this page](#)

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Case Search [Quick Help](#)

To search for a specific case associated to this Account ID, enter a Case ID, and then click **Search**. Once located, click the **Case ID** link to view detailed information for that case. You can also click the **Demand ID** link to view the *Demand Detail* page for the selected demand. Click **Cancel** to return to the *Account Detail* page.

Case ID: [Case ID Search Hint](#)

Search Results

Case ID	Demand ID	Medicare ID	Beneficiary First Name	Beneficiary Last Name	Case Demand Amount	Case Status	Date Closed
C1234560001	861236547	****1234A	Mike	Lansing	\$4,400.00	Open	
C1234560002	861236551	1EG4TE5MK73	Jack	London	\$58800.45	Closed	05/05/2020
C1234560003	861236547	****1234A	Denise	Simpson	\$10000.00	Open	
C1234560004	861236547	****1234A	Rosemary	Clinton	\$2101.00	Closed	06/05/2021

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Slide notes

Your search results will display in a table including the following columns:

- Case ID
- Demand ID
- Masked Medicare ID
- Beneficiary First Name
- Beneficiary Last Name
- Case Demand Amount
- Case Status
- Date Closed

Click the Case ID link to access the Case Information page.

Slide 25 of 28 - Case Information Page

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Case Information [Quick Help](#)

The information displayed on this page is related to Case ID: 11111111 which is included on Demand Letter ID: 123456789. Click **Demand Detail** to go to the *Demand Detail* page. Click **Demand Listing** to go to the *Demand Listing* page. Click **Case Search** to search for any Case ID/Beneficiary associated to your Account. Click **View/Submit Defense** to submit a new defense for this case or view defenses previously submitted for claims/lines associated to this case.

Please note: The information displayed on these pages is current as of: 12/09/2013.

Case Details

Beneficiary Information		Demand Information	
Beneficiary Name:	Joe W. Smith	Total Demand Amount:	\$51,100.45
Medicare ID:	*****9099A	Claim Count:	45
Insurance Group ID:	A122345678	Case Demand Amount:	\$2,300.99
Insurance Policy ID:	Not on File	Case Status:	Demand Issued
Date MSP Record Accepted by CMS:	11/12/2017	Date Closed:	11/12/2018

Employer Information		Insurer Information	
Employer Name:	Blue Cross	Insurer Name:	Not on File
Employer TIN:	0243567899	Insurer TIN:	Not on File

Financial Summary | **Electronic Payment History** | Correspondence Activity | Defense History

Account Receivable Date:	12/01/2017	Interest Rate:	0.10125
Case Outstanding Balance:	\$11,100.00	Interest Start Date:	01/17/2018
Principal Collected:	\$1100.00	Interest Accrued:	\$155.45
Remaining Principal Balance Amount:	\$8,971.40	Interest Collected:	(\$450.67)
Adjusted Amount:	\$0.00	Remaining Interest Balance Amount:	\$145.79
Treasury Referral Date:		Balance as of Date:	03/06/2018
Treasury Account Number:			
Current Status of Debt:			

Demand Detail **Demand Listing** **Case Search** **View/Submit Defense** **Submit Documentation**

Slide notes

The Case Information page will appear.

Slide 26 of 28 - Course Summary

Course Summary

- How to view case specific information for a beneficiary included in a demand on the CRCP
 - Beneficiary
 - Demand
 - Employer and Insurer
 - Financial History
 - Correspondence Activity
 - Defense History
 - Submitting Documentation
 - Electronic Payments



**Slide notes**

This course explained how to view case-specific information for a beneficiary included in a demand on the CRCP.

It described how to utilize the Case Information page to see the following case-related information:

- Beneficiary
- Demand
- Employer and Insurer
- Financial Summary
- Correspondence Activity
- Defense History
- Electronic Payments
- Submitting Documentation

Slide 27 of 28 - Conclusion

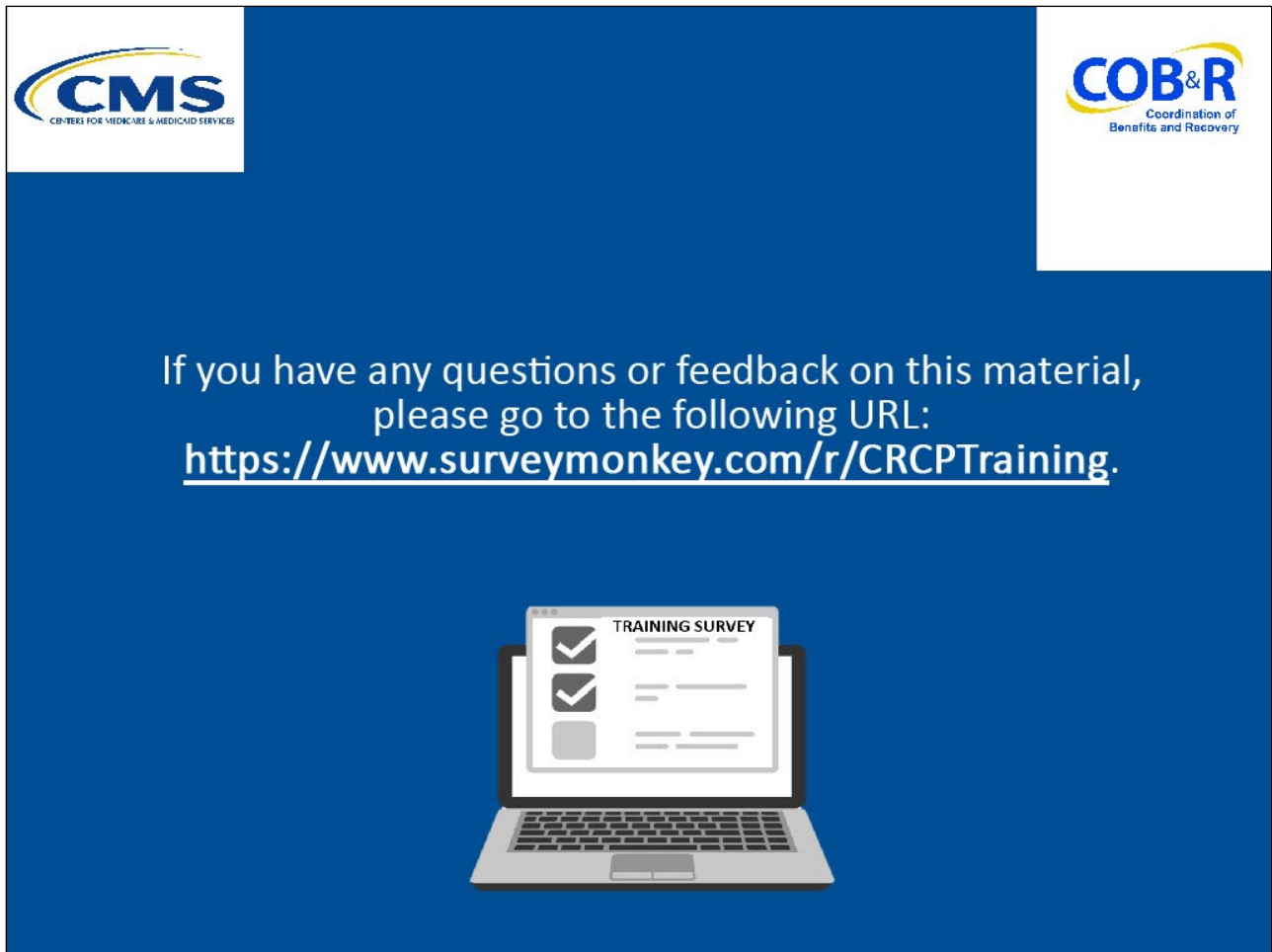


You have completed the CRCP Case Information course. Information in this course can be referenced by using the CRCP User Guide found under the *Reference Materials* menu at the following link:
<https://www.cob.cms.hhs.gov/CRCP/>.

Slide notes

You have completed the CRCP Case Information course. Information in this course can be referenced by using the CRCP User Guide found under the Reference Materials menu at the following link: [CMS CRCP Website](https://www.cob.cms.hhs.gov/CRCP/).

Slide 28 of 28 - CRCP Training 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 to the following URL: <https://www.surveymonkey.com/r/CRCPTraining>." Below the text is an illustration of a laptop displaying a "TRAINING SURVEY" form with two checked checkboxes.

Slide notes

If you have any questions or feedback on this material, please go to the following URL: [CRCP Training Survey](https://www.surveymonkey.com/r/CRCPTraining).