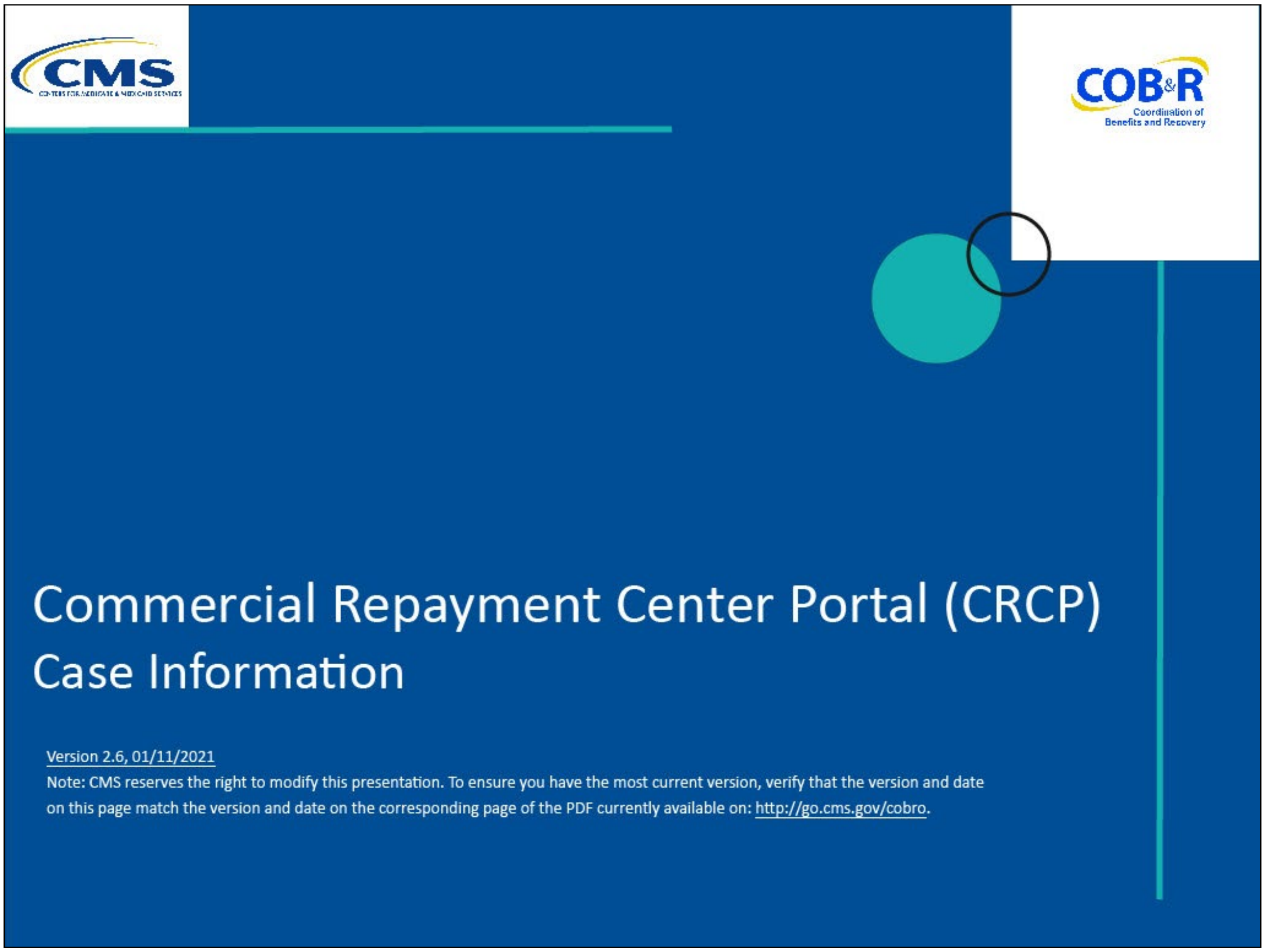
Case Information

Slide 1 of 17 - Case Information

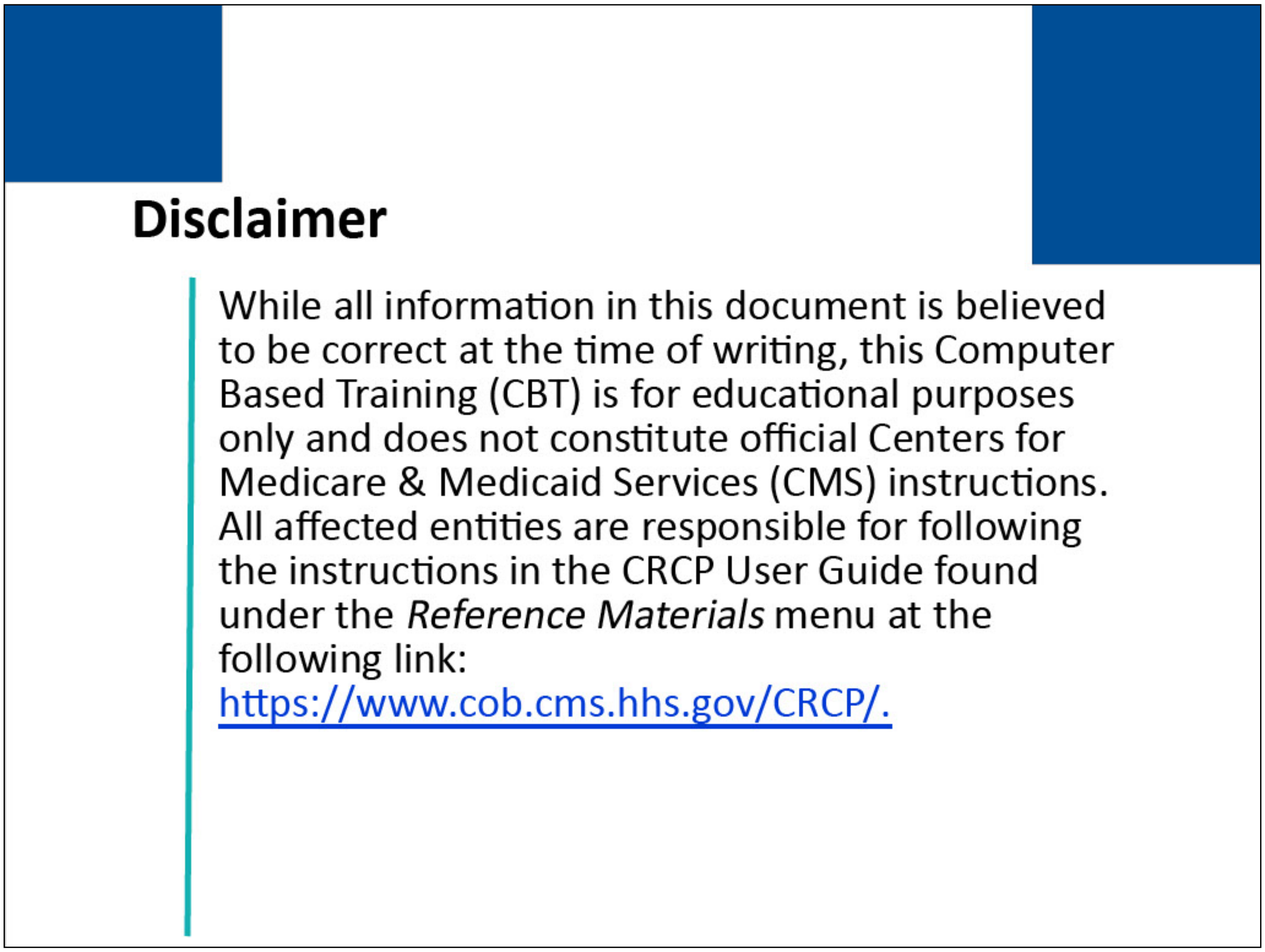


Slide notes

Welcome to the Commercial Repayment Center Portal (CRCP) Case Information course. As a reminder, you may view the slide number you are on by clicking the moving cursor.

Additionally, you can view the narration by clicking the CC button in the lower right-hand corner of the screen.

Slide 2 of 17- Disclaimer



Slide notes

While all information in this document is believed to be correct at the time of writing, this Computer Based Training or (CBT) is for educational purposes only and does not constitute official Centers for Medicare & Medicaid Services or (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: CRCP Website .

Slide 3 of 17 - Course Overview

Course Overview

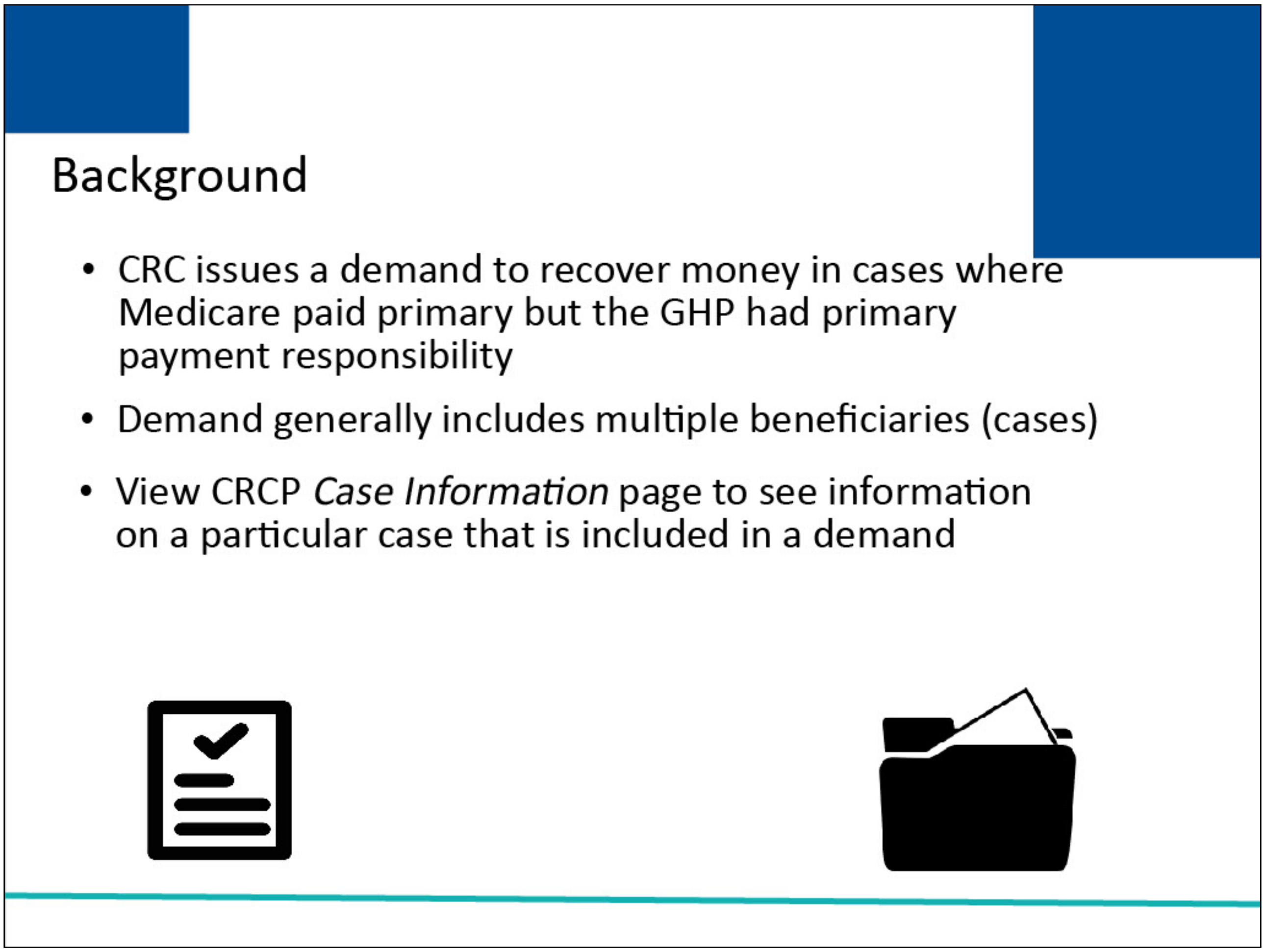
- How to view case specific information for a beneficiary included in a demand on the CRCP
  - Beneficiary
  - Demand
  - Employer and Insurer
  - Financial
  - Letter Activity
  - Defense History
  - Submitted Documents
  - Electronic Payments

Slide notes

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

It describes how to utilize the Case Information page to see the following case-related information: beneficiary, demand, employer and insurer, financial, letter activity, defense history submitted documents and electronic payments.

Slide 4 of 17 - Background



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 or case that is included in a demand, you will access the Case Information page on the CRCP.

Slide 5 of 17 - Account Listing Page

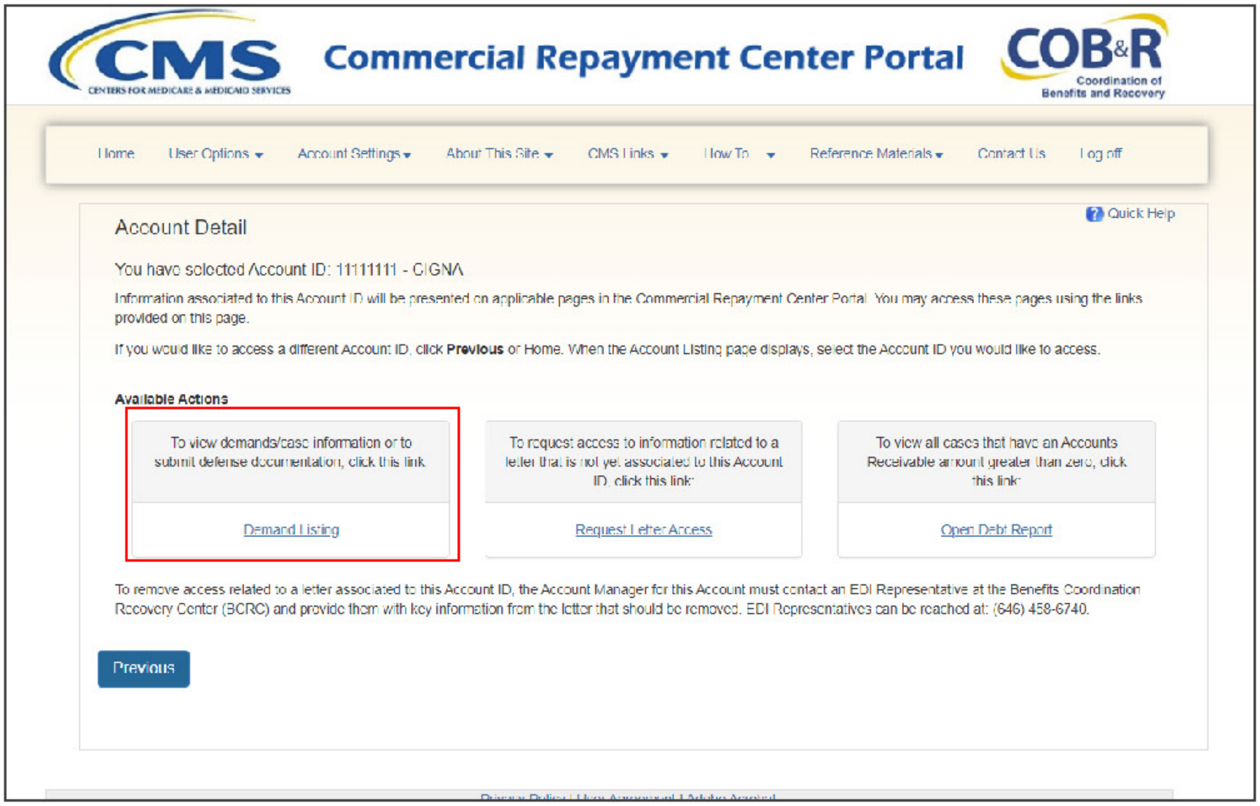
Slide notes

To review beneficiary or case information, log into the CRCP at the following link: Commercial Repayment Center Portal link. After a successful login, the Account Listing page displays.

This page lists the accounts associated to 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 6 of 17 - Account Detail Page

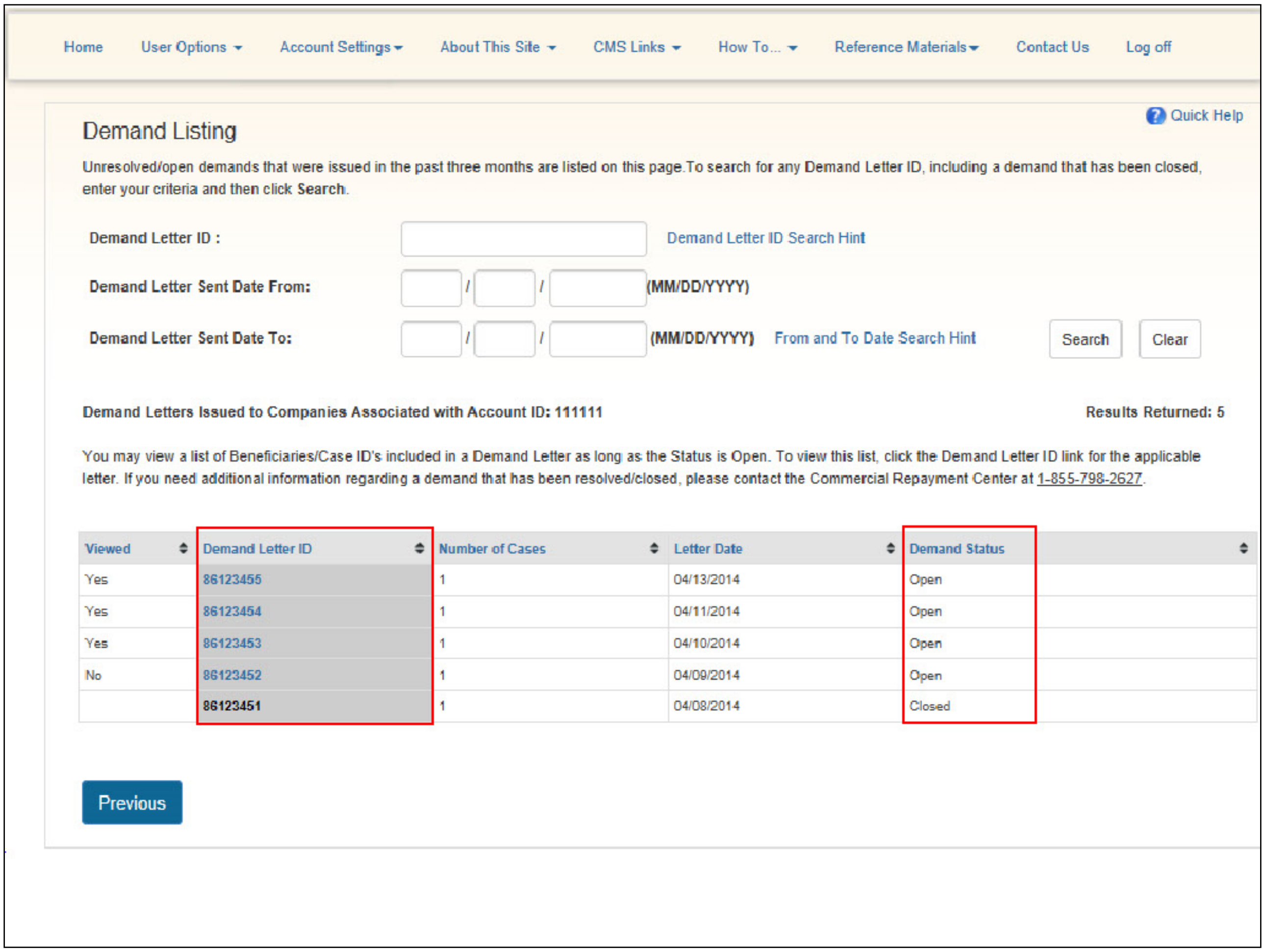


Slide notes

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

Note: The Open Debt Report hyperlink and associated text is only available for Account Managers.

Slide 7 of 17 - Demand Listing Page



Slide notes

The Demand Listing page displays. By default, this page lists all unresolved/open demands that the CRC has issued in the past 3 months.

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

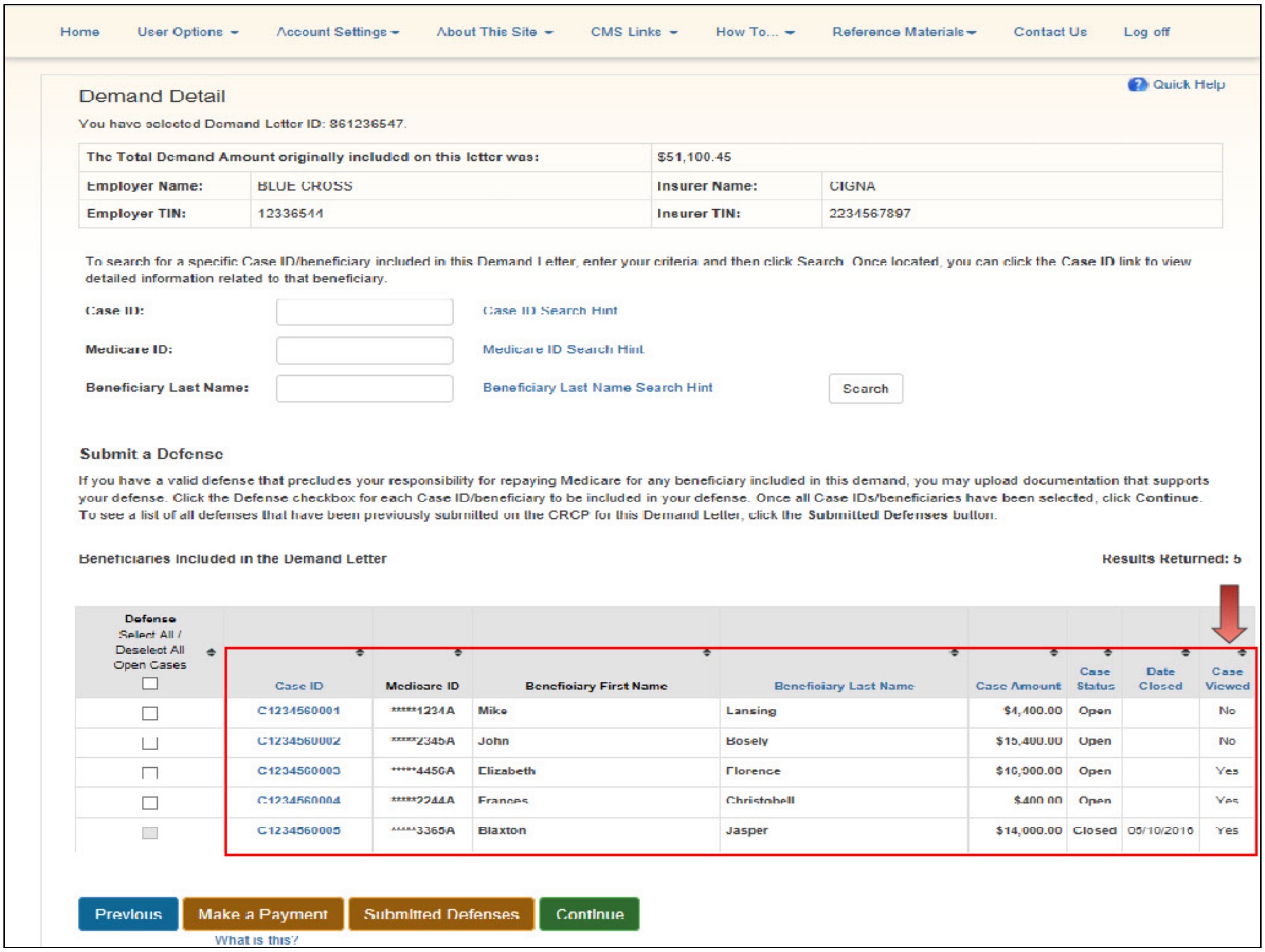
Note: No more than 100 letters will display at any given time.

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 8 of 17 - 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, you can click the Case ID link to view detailed information related to that beneficiary.

Case ID: Case ID Search Hint

Medicare ID: Medicare ID Search Hint

Beneficiary Last Name: Beneficiary Last Name Search Hint Search

Submit a Defense

If you have a valid defense that precludes your responsibility for repaying Medicare for any beneficiary included in this demand, you may upload documentation that supports your defense. Click the Defense checkbox for each Case ID/beneficiary to be included in your defense. Once all Case IDs/beneficiaries have been selected, click Continue. To see a list of all defenses that have been previously submitted on the CRCP for this Demand Letter, click the Submitted Defenses button.

Beneficiaries Included in the Demand Letter Results Returned: 5

Defense Select All / Deselect All Open Cases	Case ID	Medicare ID	Beneficiary First Name	Beneficiary Last Name	Case Amount	Case Status	Date Closed	Case Viewed
☐	C1234560001	*****1234A	Mike	Lansing	$4,400.00	Open		No
☐	C1234560002	*****2345A	John	Bosely	$15,400.00	Open		No
☐	C1234560003	*****4456A	Elizabeth	Florence	$16,900.00	Open		Yes
☐	C1234560004	*****2244A	Frances	Christobell	$400.00	Open		Yes
☐	C1234560005	*****3365A	Blaxton	Jasper	$14,000.00	Closed	05/10/2016	Yes

Previous | Make a Payment | Submitted Defenses | Continue

What is this?

Slide notes

Once you click the Demand Letter ID link, the Demand Detail page displays. This page lists all of the beneficiaries/Case IDs included in the demand letter.

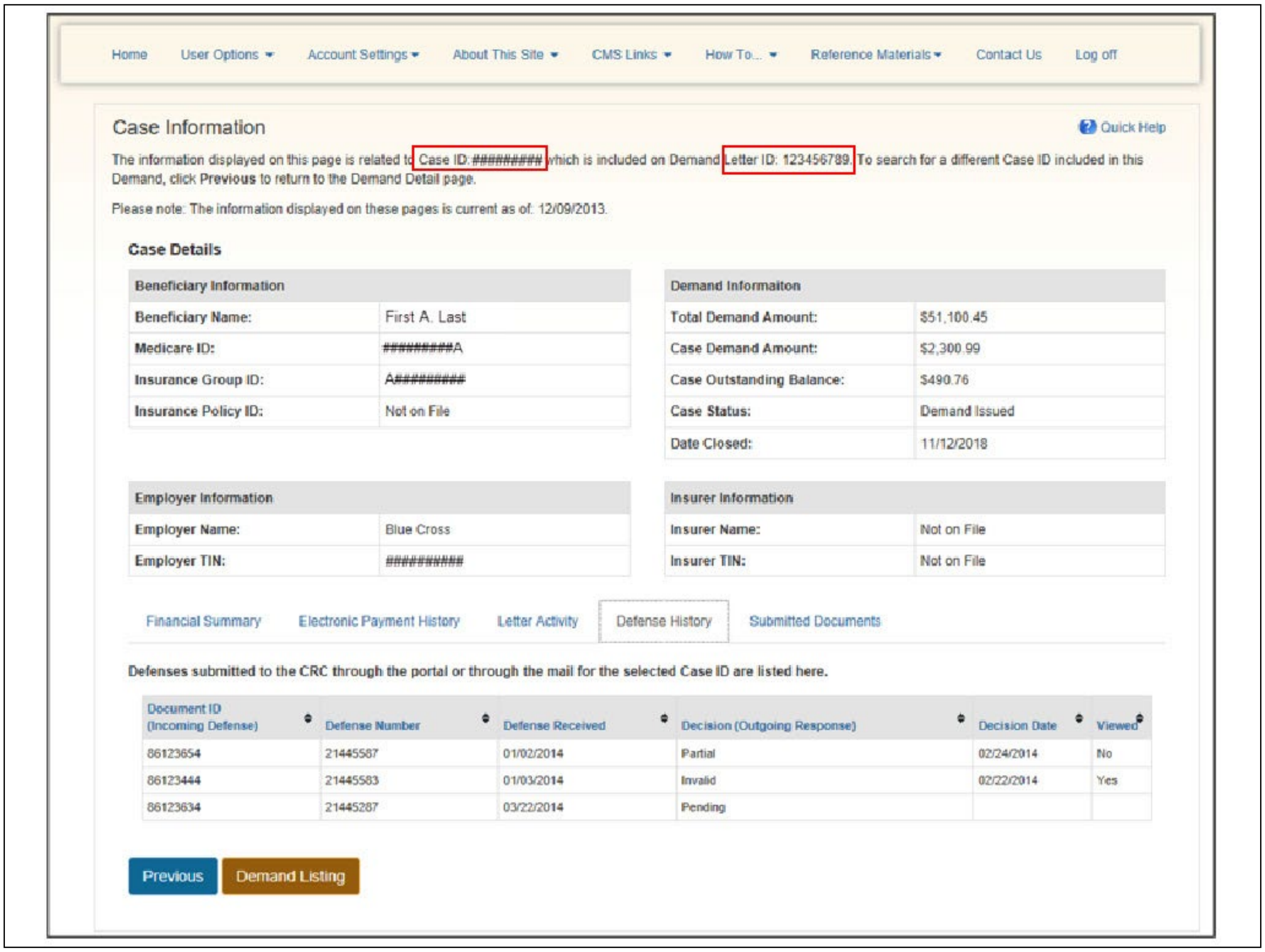
For each beneficiary included in the demand, a masked Medicare ID is displayed along with the Beneficiary Name, Case Amount, Case Status, Date Closed and Case Viewed fields.

Note: A Viewed column was added to this page to help identify when new Demands have been added to the account.

The Make a Payment button also displays on the Demand Detail page.

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

Slide 9 of 17 - Case Information Page



Slide notes

The Case Information page displays. 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 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. The Beneficiary Information section includes the Beneficiary's Name, masked Medicare ID, Insurance Group ID and Insurance Policy ID.

The Demand Information section includes the Total Demand Amount, Case Demand Amount, Case Outstanding Balance and Case Status.

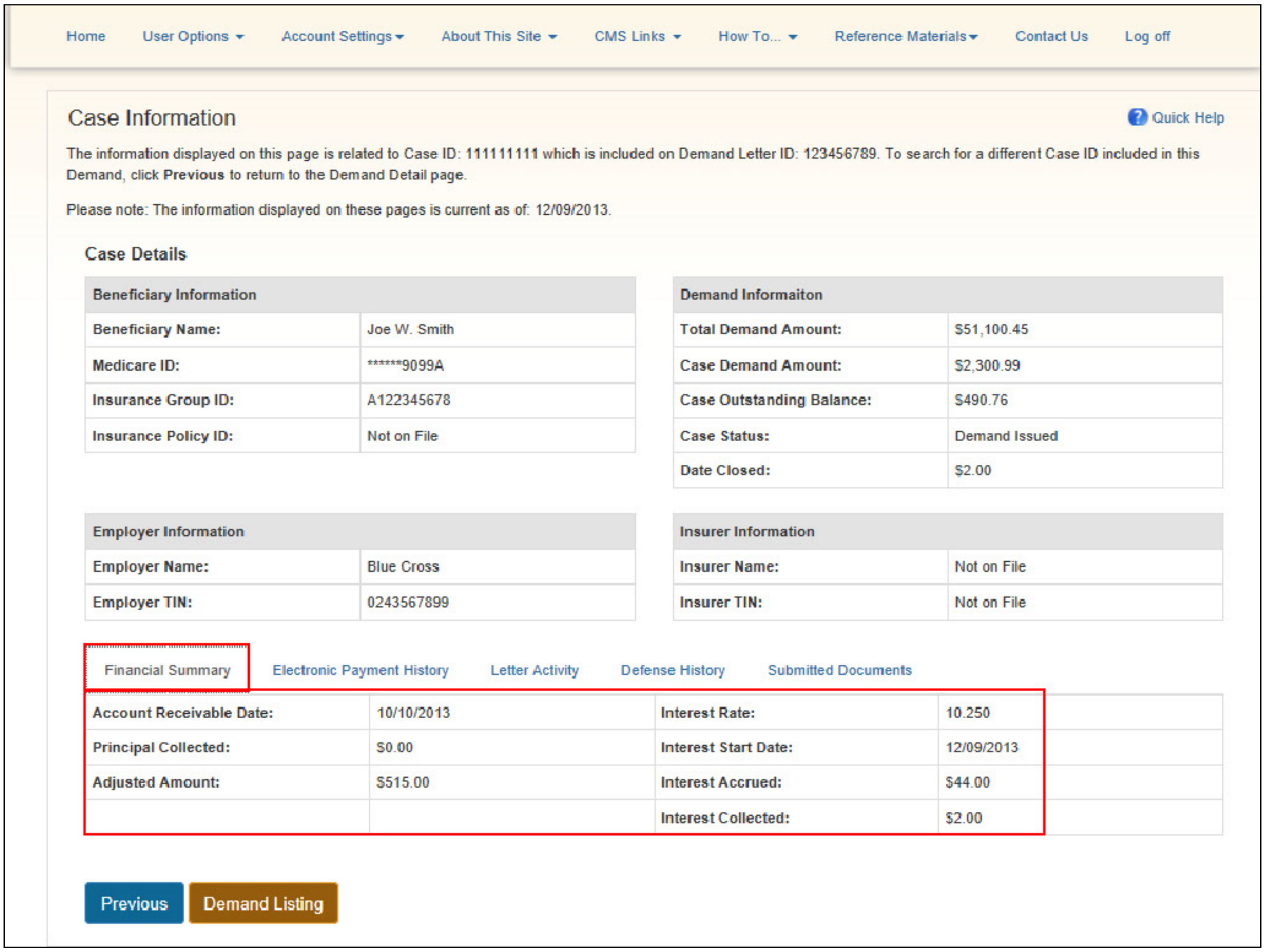
The Employer Information and Insurer Information sections include the company name and Tax Identification Number (TIN) for the employer and the insurer (if it is available).

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, letter activity, defense history and submitted documents for the case.

Note: A Demand Listing button has been added to this page for simpler navigation back to the Demand Listing page.

Slide 10 of 17 - Case Details



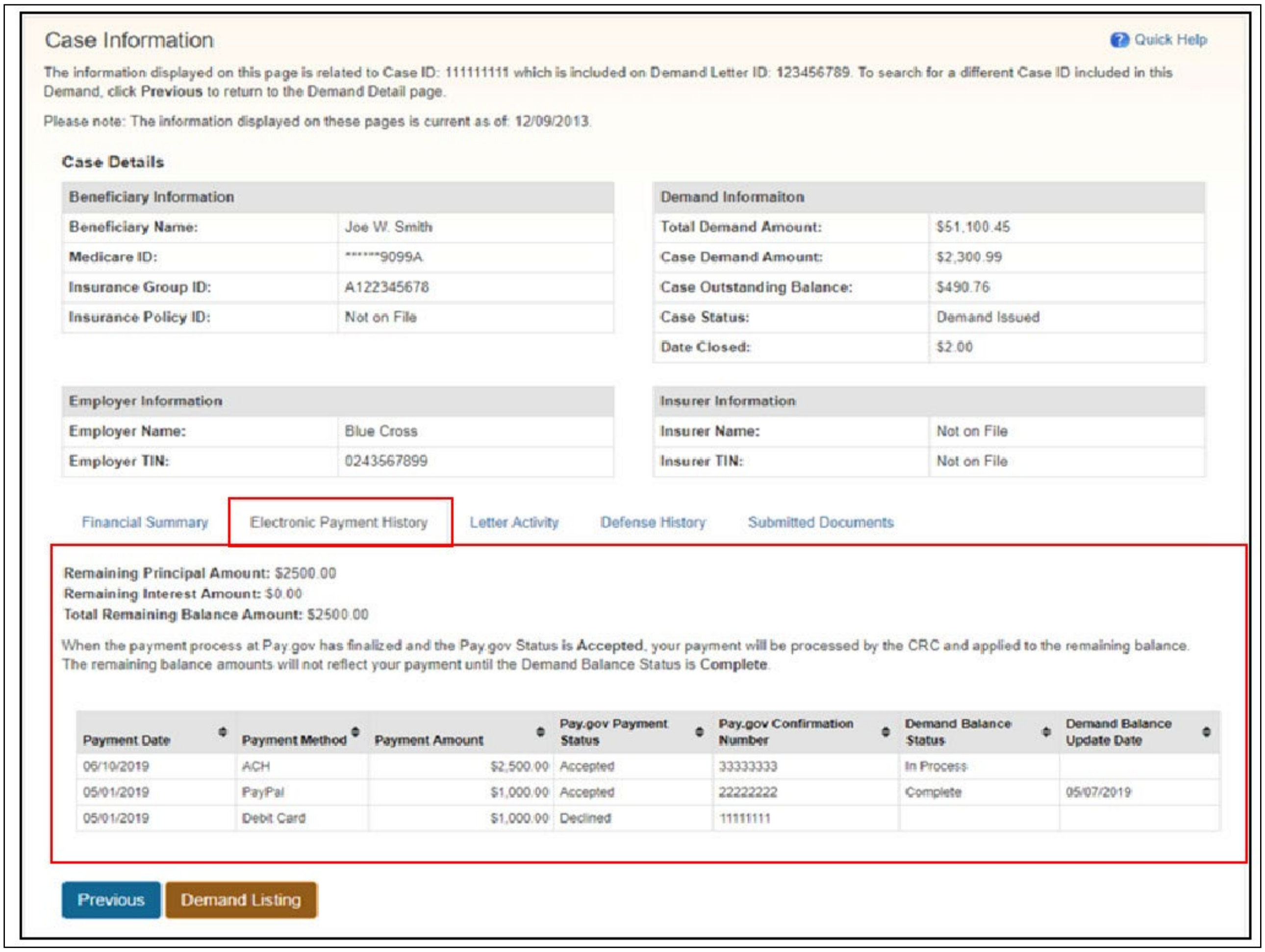
Slide notes

From the case information page, Authorized users can initiate payment. You will then be automatically directed to Pay.gov with the payment amount pre-populated. Users can pay through direct debit using their bank account information, debit card, and PayPal. For more information see the Electronic Payment CBT.

The Financial Summary tab shows the Account Receivable Date, Principal Collected, Adjusted Amount, Interest Rate, Interest Start Date, Interest Accrued and Interest Collected 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.

Slide 11 of 17 - Case Details



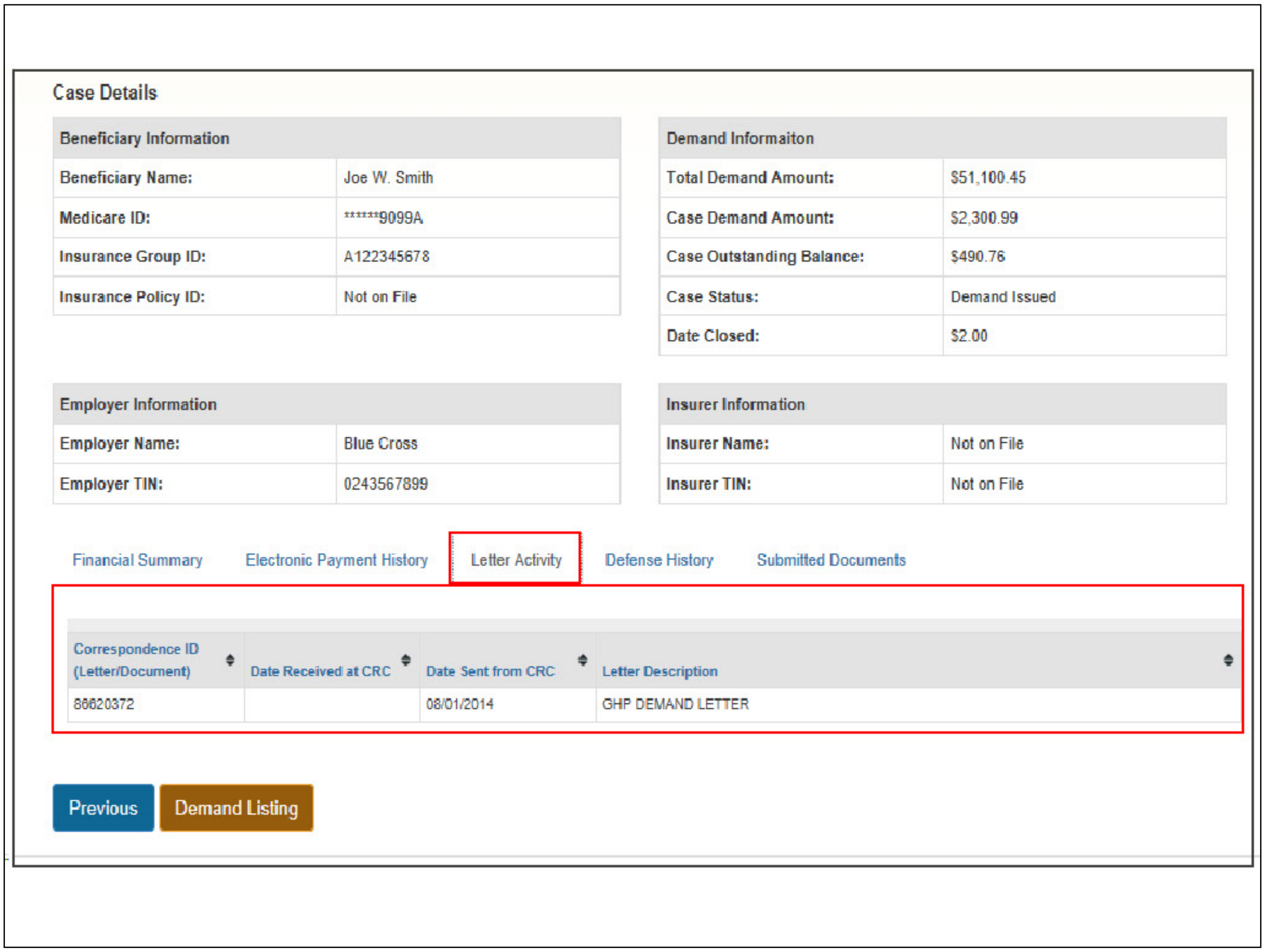
Slide notes

The Electronic Payment History Tab shows the principle amount, remaining interest and remaining balance.

Additionally, the payment date, method, amount, payment status, confirmation number, and demand balance are displayed.

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

Slide 12 of 17 - Case Details



Case Details

Beneficiary Information	
Beneficiary Name:	Joe W. Smith
Medicare ID:	******9099A
Insurance Group ID:	A122345678
Insurance Policy ID:	Not on File

Demand Informaiton	
Total Demand Amount:	$51,100.45
Case Demand Amount:	$2,300.99
Case Outstanding Balance:	$490.76
Case Status:	Demand Issued
Date Closed:	$2.00

Employer Information	
Employer Name:	Blue Cross
Employer TIN:	0243567899

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

Financial Summary Electronic Payment History Letter Activity Defense History Submitted Documents

Correspondence ID (Letter/Document)	Date Received at CRC	Date Sent from CRC	Letter Description
86620372		08/01/2014	GHP DEMAND LETTER

Previous Demand Listing

Slide notes

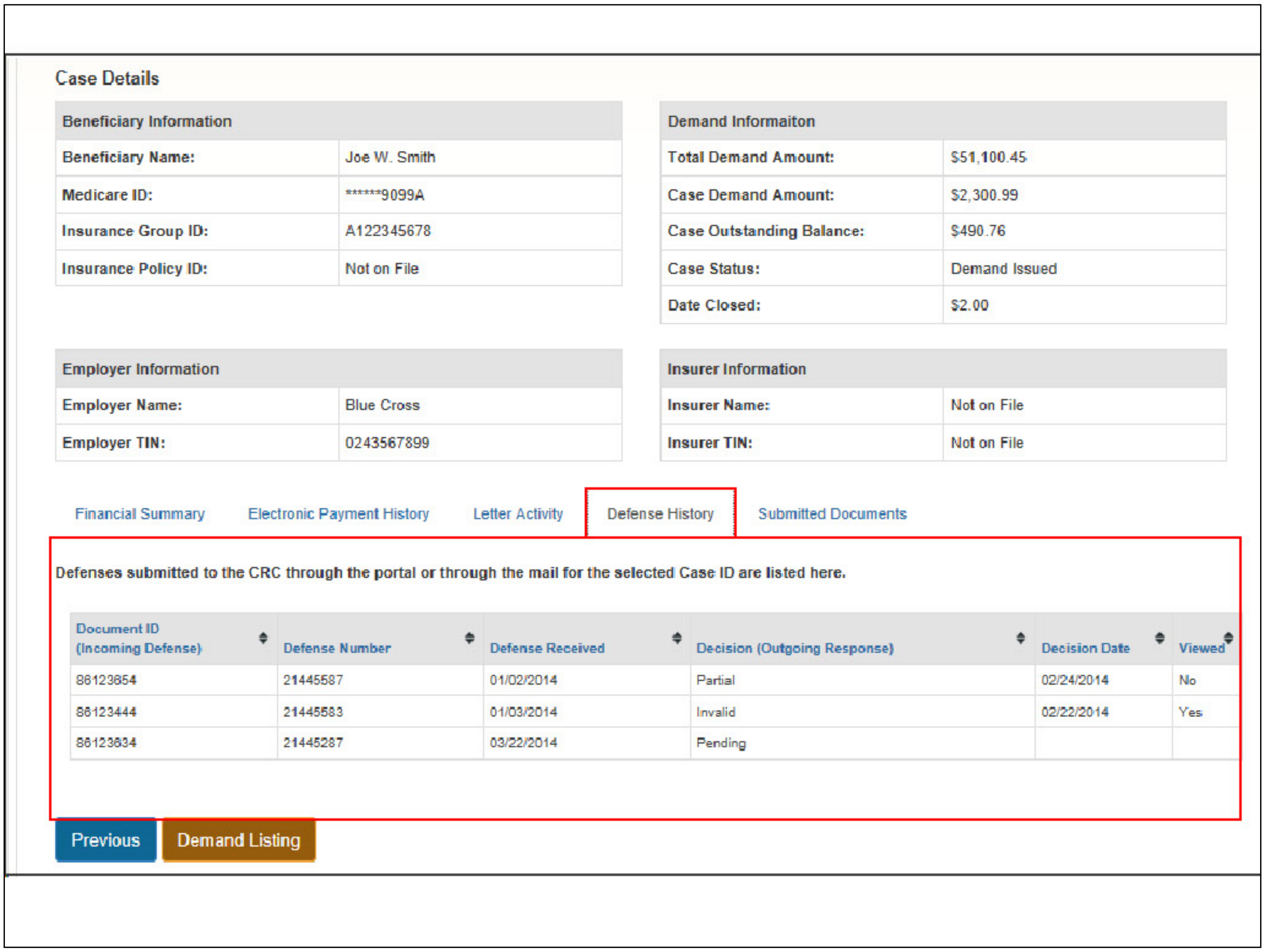
The Letter Activity tab shows all incoming and outgoing correspondence related to the Case ID, except correspondence related to a defense.

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 13 of 17 - Case Details



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.

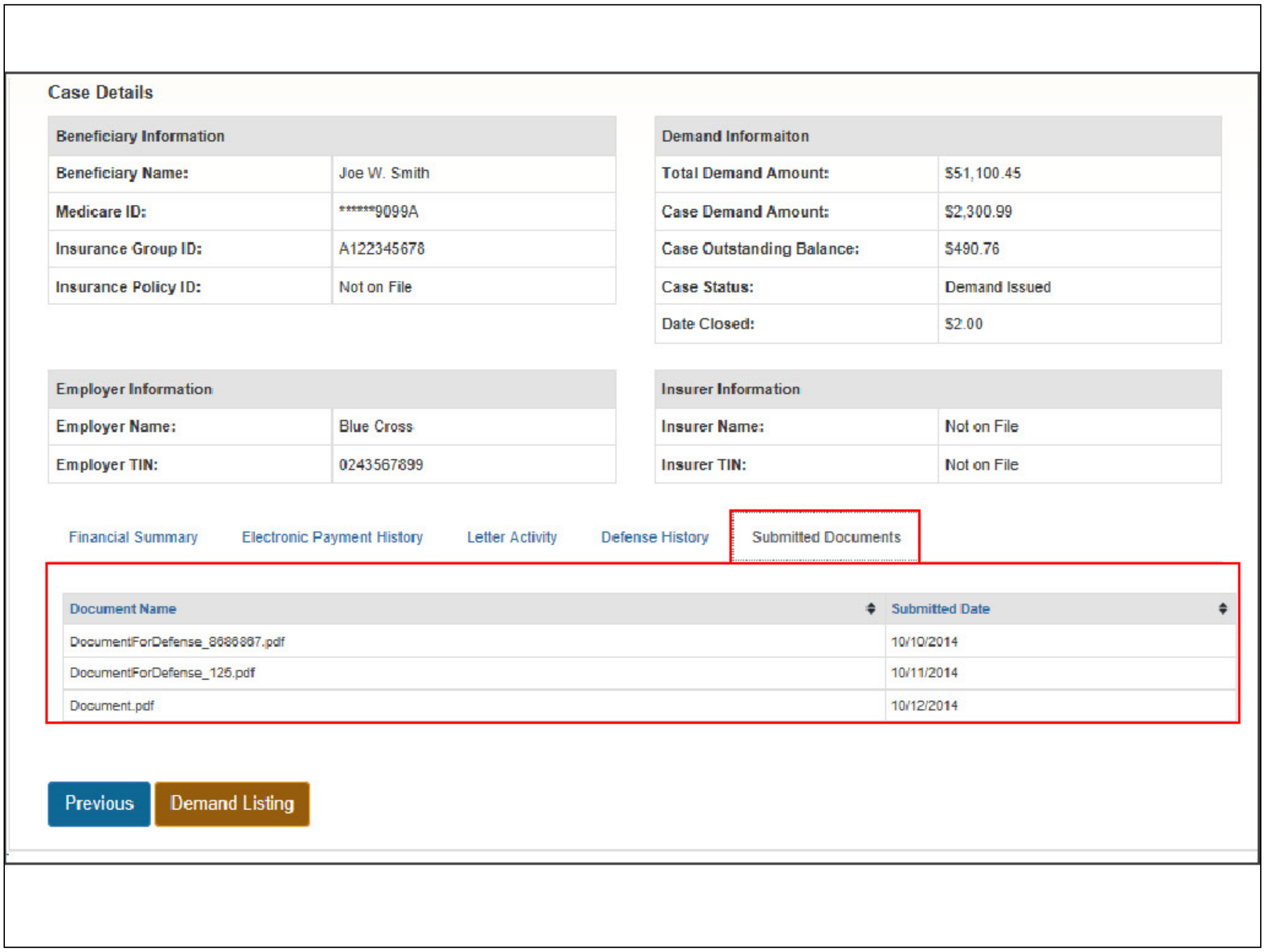
The date the CRC made the decision will also be shown.

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.

Click the Submitted Documents tab to view files that were submitted on the CRCP.

Enter slide note

Slide 14 of 17 - Case Details

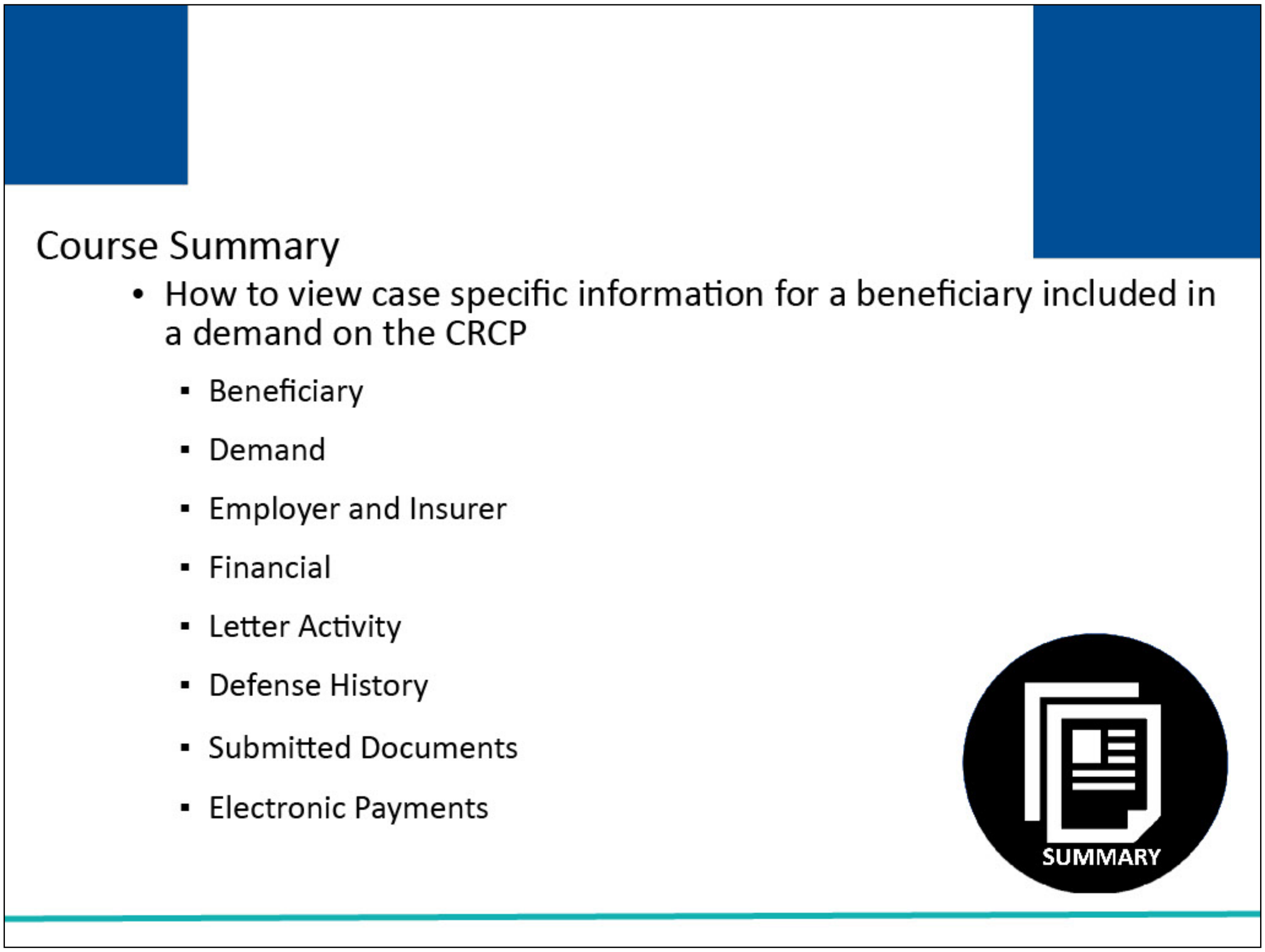


Slide notes

The Submitted Documents tab shows the Document Name and Submitted Date for each file you have submitted through the CRCP for the selected Case ID.

You cannot view or download the submitted documentation. Click either column heading to sort the information displayed. Click Previous at any time to return to the Demand Detail page.

Slide 15 of 17 - Course Overview



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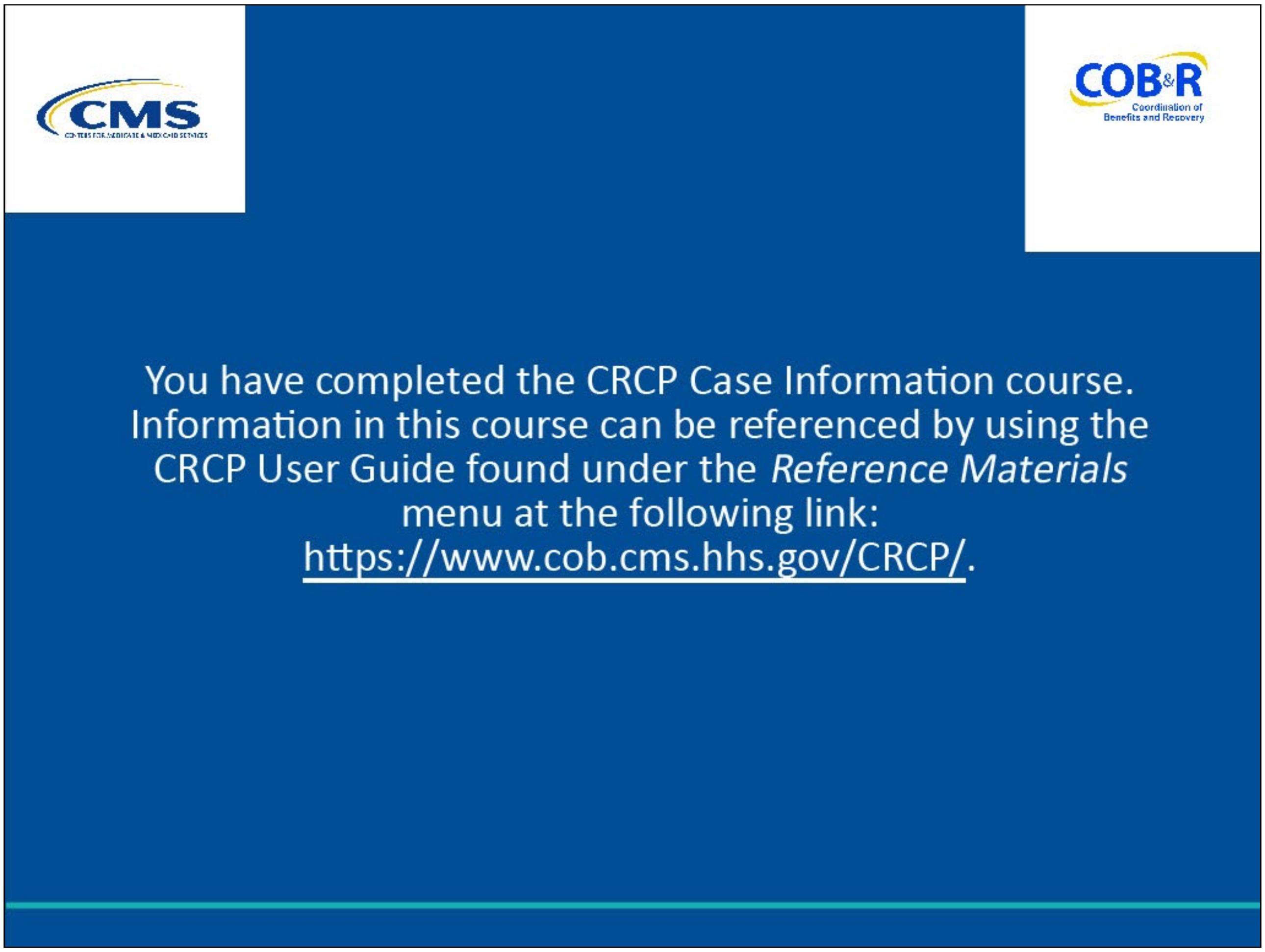
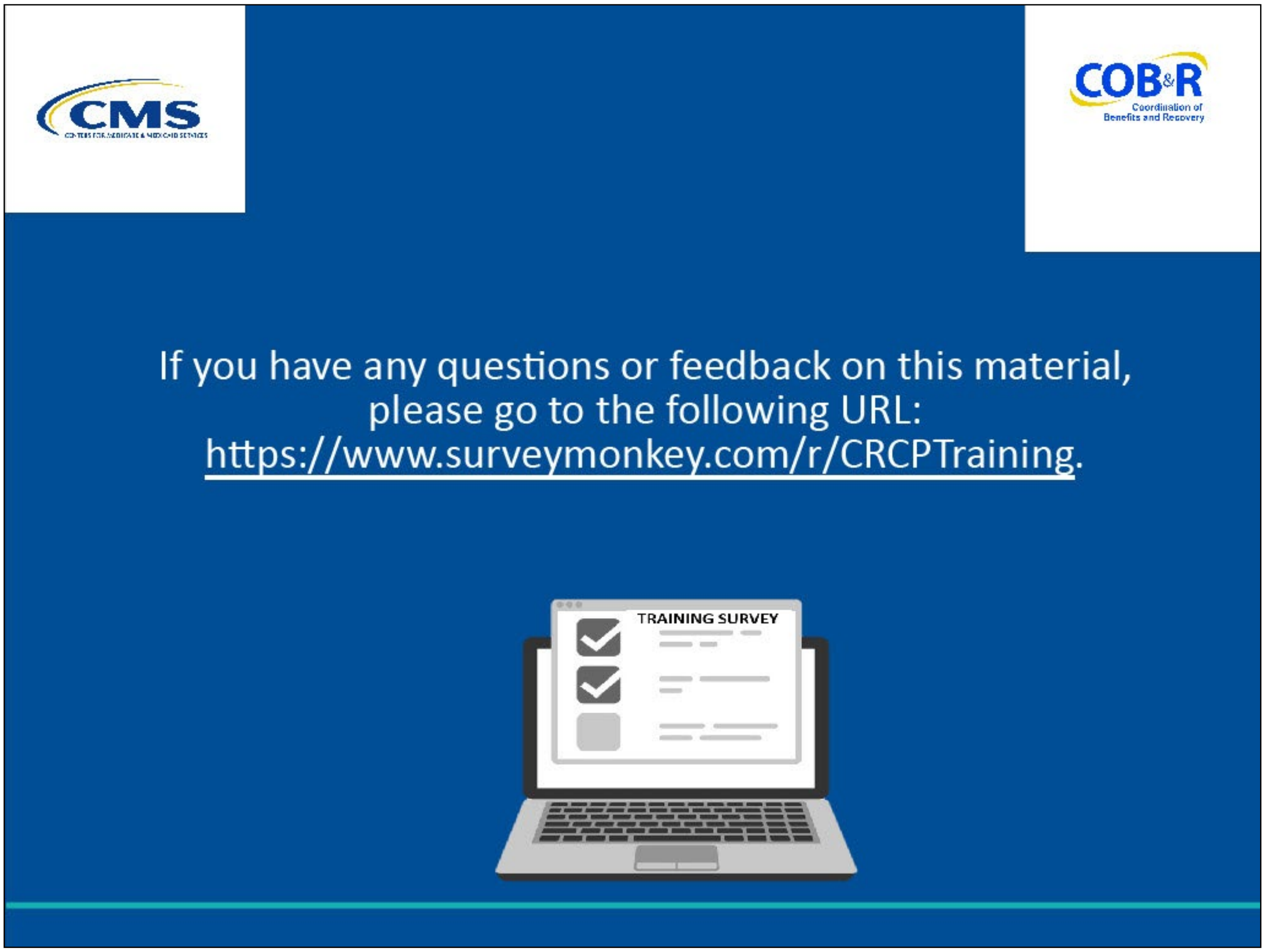
Slide 16 of 17 - Conclusion



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: CRCP Website.

Slide 17 of 17 - Survey



Slide notes

If you have any questions or feedback on this material, please go to the following URL: CRCP Training Survey.