Account Designee Access

Slide 1 - of 22 - Account Designee Access

Slide notes

Welcome to the Commercial Repayment Center Portal (CRCP) Account Designee Access course.

Slide 2 of 22 - Disclaimer

Disclaimer

While all information in this document is believed to be correct at the time of writing, this Computer Based Training (CBT) is for educational purposes only and does not constitute official Centers for Medicare & Medicaid Services (CMS) instructions. All affected entities are responsible for following the instructions in the CRCP User Guide found under the *Reference Materials* menu at the following link: https://www.cob.cms.hhs.gov/CRCP/.

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Slide 3 of 22 - Course Overview

Course Overview

- Account Designee Registration
  - Setting up a Login ID and Password

- CRCP Functions of the Account Designee

Slide notes

This course explained the basic registration process a new user will follow to become an Account Designee, (i.e., how you will set up your Login ID and Password) and the basic CRCP functions you will have access to once registered.

Slide 4 of 22 - Account Designee

Slide notes

The CRCP Account Manager invites Account Designees to assist with the case recovery process on the CRCP. This includes tracking Group Health Plan (GHP) cases and submitting documented defenses.

Slide 5 of 22 - Invitation Email

Slide notes

Once you have been selected and added to an account as an Account Designee, the CRCP sends you an invitation email that includes instructions on your next steps. A sample email is shown on the slide. The invitation email will include the CRCP Account ID.

If you already have a Login ID for the Section 111 Coordination of Benefits Secure Website (COBSW), Workers' Compensation Medicare Set-Aside Portal (WCMSAP), Medicare Secondary Payer Recovery Portal (MSPRP) or CRCP (for another account), you will not register for another Login ID. The invitation email will include a link to the CRCP. You will access the CRCP using your existing Login ID and Password for these systems.

If you do not already have a Login ID for the Section 111 COBSW, WCMSAP, MSPRP, or CRCP, you must click on the link in the invitation email to register.

Slide 6 of 22 - Login Warning Page

Slide notes

When you click the link in the invitation email, the Login Warning page will appear. This page provides information about CRCP security measures including access, penalty and privacy laws. This page can be printed from the CRCP by clicking the Print this page link on the website.

Scroll to the bottom of this page to review the entire statement. You must agree to the terms of this warning each time you access the CRCP. Click the I Accept link at the bottom of the page to continue.

Slide 7 of 22 - Account Designee Registration Page

Slide notes

The Account Designee Registration page appears. As an Account Designee, you register yourself on the CRCP. You will only go through this process once, as you need only one Login ID no matter how many Account IDs you will ultimately work with.

This is the initial page in the registration process where you will create your Login ID and Password for the CRCP.

Slide 8 of 22 - Passphrase

Slide notes

You are required to enter the Passphrase given to you by the Account Manager for this account. The Passphrase is a short sequence of case-sensitive letters, numbers, and/or symbols, up to 30 characters long.

Enter the passphrase exactly the way it was given to you. If the Account Manager did not provide you with the Passphrase, contact them at the phone number or email address displayed on this page.

Slide 9 of 22 - User Agreement and Privacy Policy

Slide notes

Read the User Agreement and Privacy Policy which may be viewed in the scroll box at the bottom of the Account Designee Registration page. Alternatively, you can print a copy of the agreement by clicking the View and Print the User Agreement and Privacy Policy link.

You must agree to the terms in the User Agreement to proceed with your registration. To accept the agreement, click the I accept checkbox and then click Continue to proceed to the next page in the Account Designee Registration process.

Slide 10 of 22 - Account Designee Personal Information Page

Slide notes

The Account Designee Personal Information page appears. All fields with an asterisk (*) are required.

Enter your name, phone number and mailing address. Place the street number and street name in the Address Line 1 field. Place other information such as suite number, attention to, etc. in the Address Line 2 field, if applicable.

When you have entered the required information, click Continue.

Slide 11 of 22 - Account Designee Login Information Page

Slide notes

The Account Designee Login Information page appears. This page is used to set up your Login ID and Password. Use your existing ID or create and enter a Login ID and enter and re-enter a Password that conforms to the CMS standard guidelines shown on the slide. You will use your Login ID and Password to access the CRCP site.

Slide 12 of 22 - Security Questions

Slide notes

Choose security questions and provide answers that are easily remembered. This information will allow you to access your Login ID and reset your Password in the event you forget either one.

When you have completed the Account Designee Login Information page, click Continue.

Slide 13 of 22 Account Designee Registration Summary Page

Slide notes

The Account Designee Registration Summary page will appear next. This page includes a summarized view of the information that was entered during the Account Designee registration process. It also provides you with the opportunity to revise your name, phone number, address, Login ID and/or Password.

Once you have completed any corrections, click Continue on the page you are editing, as well as each subsequent page until you return to the Account Designee Registration Summary page.

When you have verified the information, click Continue.

Slide 14 of 22 - Account Designee - Thank You Page

Slide notes

The Account Designee Thank You page will appear. This confirms that you have successfully completed your registration.

Click OK to return to the Login Warning page.

Slide 15 of 22 - Login Warning Page

Slide notes

Click the I Accept link at the bottom of the page to continue.

Slide 16 of 22 - Welcome to the CRCP - Login Page

Slide notes

The Welcome to the CRCP page appears. You can login to the CRCP using the Login ID and Password you just created and begin using the CRCP to access accounts associated with your Login ID. Enter your Login ID and Password and then click Login.

If you forget your password, select "Forgot Password" and you can enter the temporary password sent to the designated email for this account.

The Forgot Password feature on the CRCP Welcome page now allows users to unlock their account, if locked after three unsuccessful login attempts, or to reactivate an inactive account. Note: To provide increased user security, additional security questions have been added to the Forgot Login ID and Forgot Password pages.

Note: To provide increased user security, additional security questions have been added to the Forgot Login ID and Forgot Password pages. Three preliminary questions linked to your personal registration information will appear prior to your security questions.

Slide 17 of 22 - Account Listing Page

Slide notes

The Account Listing page appears. You are now logged into the CRCP system. The Account Listing page is the CRCP Home page. This page functions as the main page where you will select the Account ID that you want to work on. The Account IDs listed on this page are the accounts you are associated with.

Click the Account ID you want to work with.

Slide 18 of 22 - Account Detail Page

Slide notes

The Account Detail page will appear. The Account ID you just selected is displayed at the top of the page. This page functions as the main page where you can access the CRCP functions available to you: Demand Listing, Case Search, and Request Letter Access. Note: The following links are only available for the Account Manager: Open Debt Report, Go Paperless, and Letter Notifications.

Demand Listing is used to view demands/case information or to submit defense documentation. For more information on this function, see the "Demands" CBT. Once a Demand is issued, users can make electronic payments. For more information on this function, see the "Electronic Payment" CBT.

Case Search is used to search for a case associated with the selected Account ID.

Request Letter Access is used to associate data related to a Demand or Defense Letter to your CRCP account. See the "Request Letter Access" CBT for more information.

Note: To help users better monitor demanded cases where balances are due the following columns have been added to the CRCP Open Debt Report page: Claim Count, Treasury Ref Date, Last Letter, Last Letter Date, and Fed Agency ID. To provide additional information, four columns to identify authorized parties have been added to the Open Debt Report as well.

Go Paperless is used to request/update paperless preferences for the account selected.

Letter Notification is used to view/print "Go Paperless" letter notification emails and letters for the account ID selected. To enhance Go Paperless functionality, a Clear button, and a new downloaded column have been added to the Letters for Email Date page so users can see when paperless letters were downloaded.

Open Debt Report is used to view all cases that have an Accounts Receivable amount greater than zero.

Slide 19 of 22 - Assistance

Slide notes

If you are unable to register for the CRCP or are having trouble logging in to your account, please contact an Electronic Data Interchange (EDI) Representative. EDI Representatives may be reached by phone at: (646) 458-6740.

Slide 20 of 22 - Course Summary

Course Summary

- Account Designee Registration

  - Setting up a Login ID and Password

- CRCP Functions of the Account Designee

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This course explained the basic registration process a new user will follow to become an Account Designee, (i.e., how you will set up your Login ID and Password) and the basic CRCP functions you will have access to once registered.

Slide 21 of 22 - Conclusion
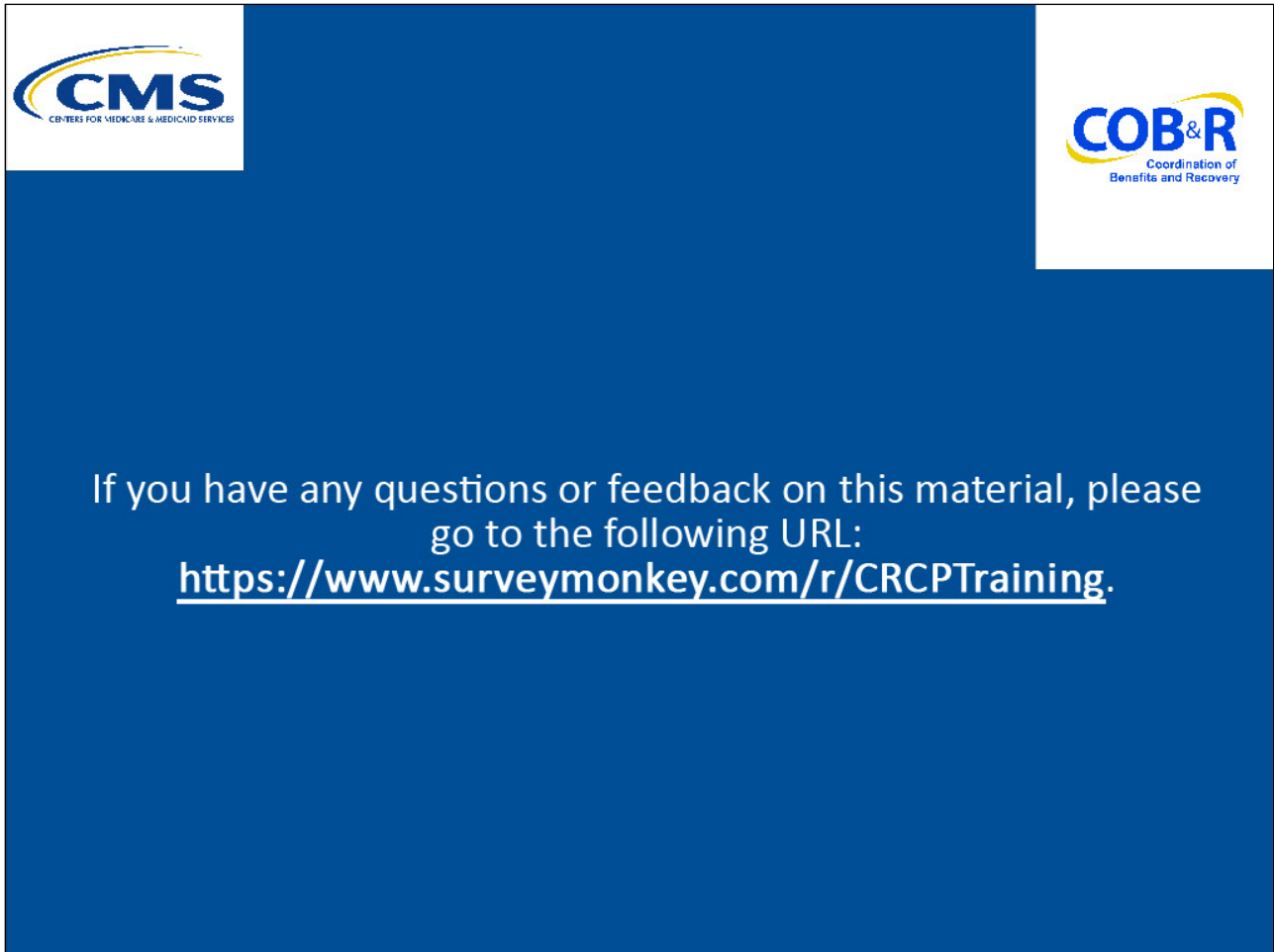

Slide notes

You have completed the CRCP Account Designee Access course. Information in this course can be referenced by using the CRCP User Guide found under the Reference Materials menu at the following link: Commercial Repayment Center Portal link.

Slide 22 of 22 - CRCP Training Survey

Slide notes

If you have any questions or feedback on this material, please go to the following URL: https://www.surveymonkey.com/r/CRCPTraining.