Account Designee Maintenance

Slide 1 of 30 - Account Designee Maintenance
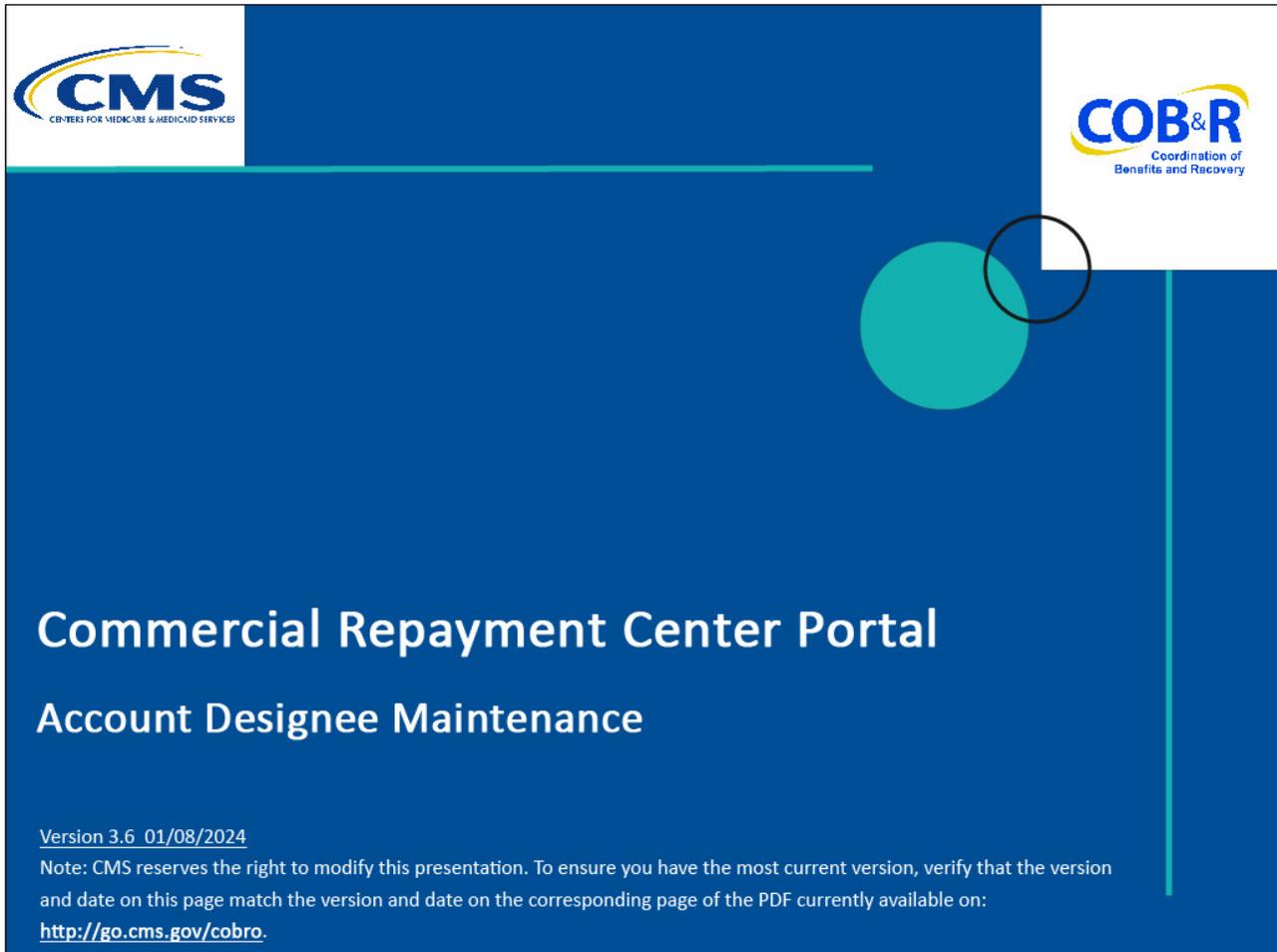
Slide notes

Welcome to the Commercial Repayment Center Portal or CRCP Account Designee Maintenance course.

Slide 2 of 30 - 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

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Slide 3 of 30 - Course Overview

Course Overview

- How an Account Manager oversees Account Designees

    - Invite/add an Account Designees to a CRCP account

    - Update Account Designee information
        - Re-generate invitation email

    - Delete an Account Designee from a CRCP account

Slide notes

This course explains how the Account Manager can invite or add individuals (Account Designees) to assist with a CRCP account. It describes how to update Account Designee information and how to re-generate the invitation email. It will also explain how to delete Account Designees from an account.

Slide 4 of 30 - CRCP Account
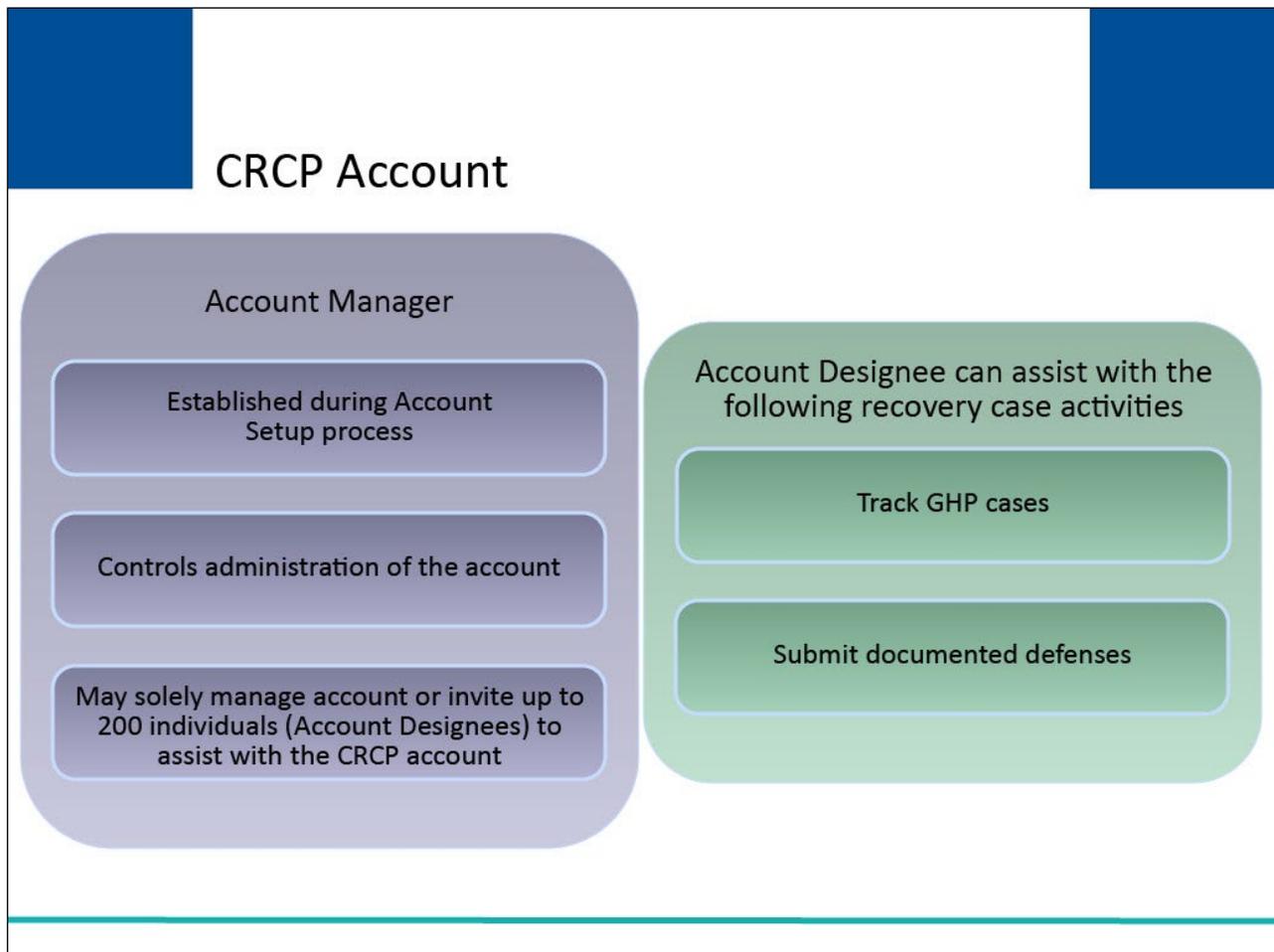
Slide notes

Each CRCP account must have an assigned Account Manager who is established during the Account Setup process. This person controls the administration of the organization's account and recovery case workload.

The Account Manager may choose to manage the entire account by themselves or may invite up to 200 individuals (Account Designees) to assist in this process.

Account Designees can assist the Account Manager with the following recovery case activities: tracking Group Health Plan or GHP cases and submitting documented defenses.

Slide 5 of 30 - Account Listing Page

Slide notes

Once you are registered as a CRCP user, you may login to the CRCP at the following link: CMS CRCP Website. Each time a user visits the CRCP website, the Login Warning page will appear.

Slide 6 of 30- Account Listing Page

Slide notes

From the Welcome page, enter your login ID and password.

Slide 7 of 30 - Account Listing Page

Slide notes

To add Account Designees, the Account Manager logs into the CRCP at the following link: https://www.cob.cms.hhs.gov/CRCP/. After a successful login, the Account Listing page will appear.

This page lists the accounts associated to your Login ID. Select the Account ID link for the account you want to invite a designee.

Slide 8 of 30 - Account Detail Page

Slide notes

The Account Detail page will appear. The Account ID selected is shown at the top of the page. If you have selected the incorrect Account ID, click Previous to return to the Account Listing page.

Note: The Go Paperless and Open Debt Report hyperlinks and associated text are only available for Account Managers.

Slide 9 of 30 - Account Detail Page

Slide notes

Select Designee Maintenance from the Account Settings drop-down menu.

Slide 10 of 30 - Account Designee Listing Page

Slide notes

The Account Designee Listing page will appear. This page lists all designees that have been invited or assigned to the account. To add an Account Designee, you must first invite them. To begin this process, click Add Designee.

Slide 11 of 30 - Account Designee Information Page

Slide notes

The Account Designee Invitation page will appear. Enter and re-enter the email address of the individual you wish to invite and click Continue.

Slide 12 of 30- Add Account Designee
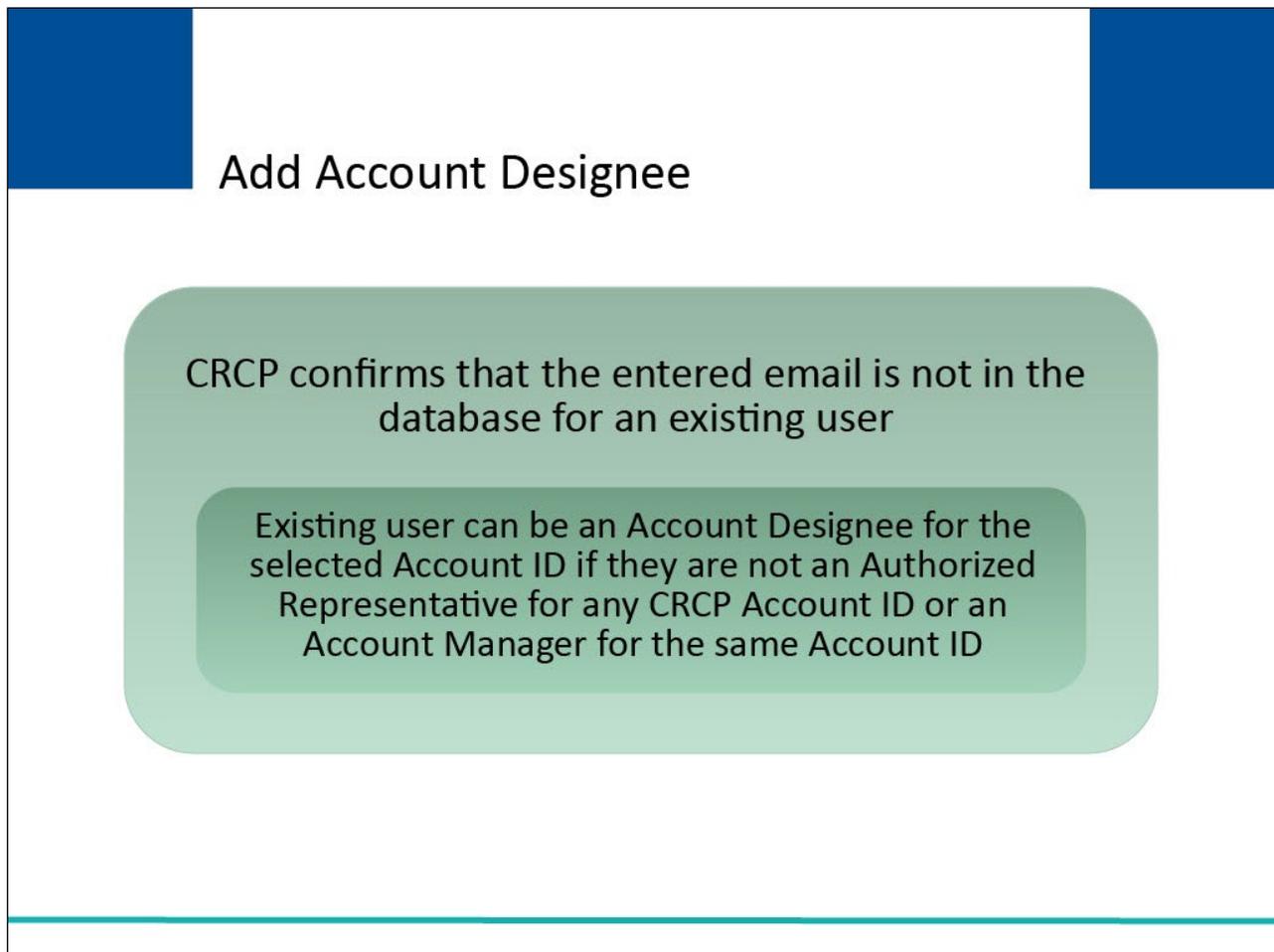
Slide notes

The CRCP will determine if the invited Account Designee is an existing user (i.e., is an existing user of the Section 111 Coordination of Benefits Secure Website (COBSW), Workers' Compensation Medicare Set-Aside Portal (WCMSAP), Medicare Secondary Payer Recovery Portal (MSPRP) and/or the CRCP (for another account)).

An existing user can be an Account Designee for your Account ID as long as they are not an Authorized Representative for any CRCP Account ID, or the Account Manager for the same Account ID.

Slide 13 of 30- Account Designee Invitation Page

Slide notes

When the Account Manager clicks Continue on the Account Designee Information page, the Account Designee Invitation page will appear. If the entered email address is found in the system (i.e., the intended Account Designee is already a user of the Section 111 COBSW, WCMSAP, MSPRP or CRCP), this page displays the Designee First and Last Name and the Designee email address as read-only data fields. Confirm that the information displayed is correct and click Continue to proceed.

If the email address is not found in the system, you must enter the first and last name for the invited Account Designee, and create a Passphrase (a short, case-sensitive phrase, up to 30 characters). Enter and re-renter the Passphrase. Do not cut and paste this information.

You must contact your Account Designee and provide them with the Passphrase. The Account Designee will need this Passphrase to register. Click Continue to proceed.

Slide 14 of 30 - Account Designee Confirmation Page

Slide notes

The Account Designee Confirmation page will appear. This page confirms that the Account Designee has been invited to the account. Click OK.

Slide 15 of 30- Account Designee Listing Page

Slide notes

The Account Designee Listing page re-appears. If the entered email address was found in the system, the Account Designee is listed with an 'Active' Status. If the email address was not found in the system, the Account Designee is listed with a 'Pending' status.

Slide 16 of 30 - Invitation Email

Slide notes

Once the invitation process is complete, the Account Designee will receive an email notifying them that they have been invited to be an Account Designee for the account.

If the Account Designee is an existing user (i.e., is already a user of the Section 111 COBSW, WCMSAP, MSPRP or the CRCP), they will be notified that they may log into the CRCP and complete tasks related to the CRCP account.

If the Account Designee is not an existing user, they will be instructed to click on the link provided in the email. This link will transfer them to a CRCP registration page where they will be required to enter the Passphrase that you created.

When they have completed the registration process, the Account Designee will be able to access the CRCP account.

Slide 17 of 30 - Update Account Designee Information
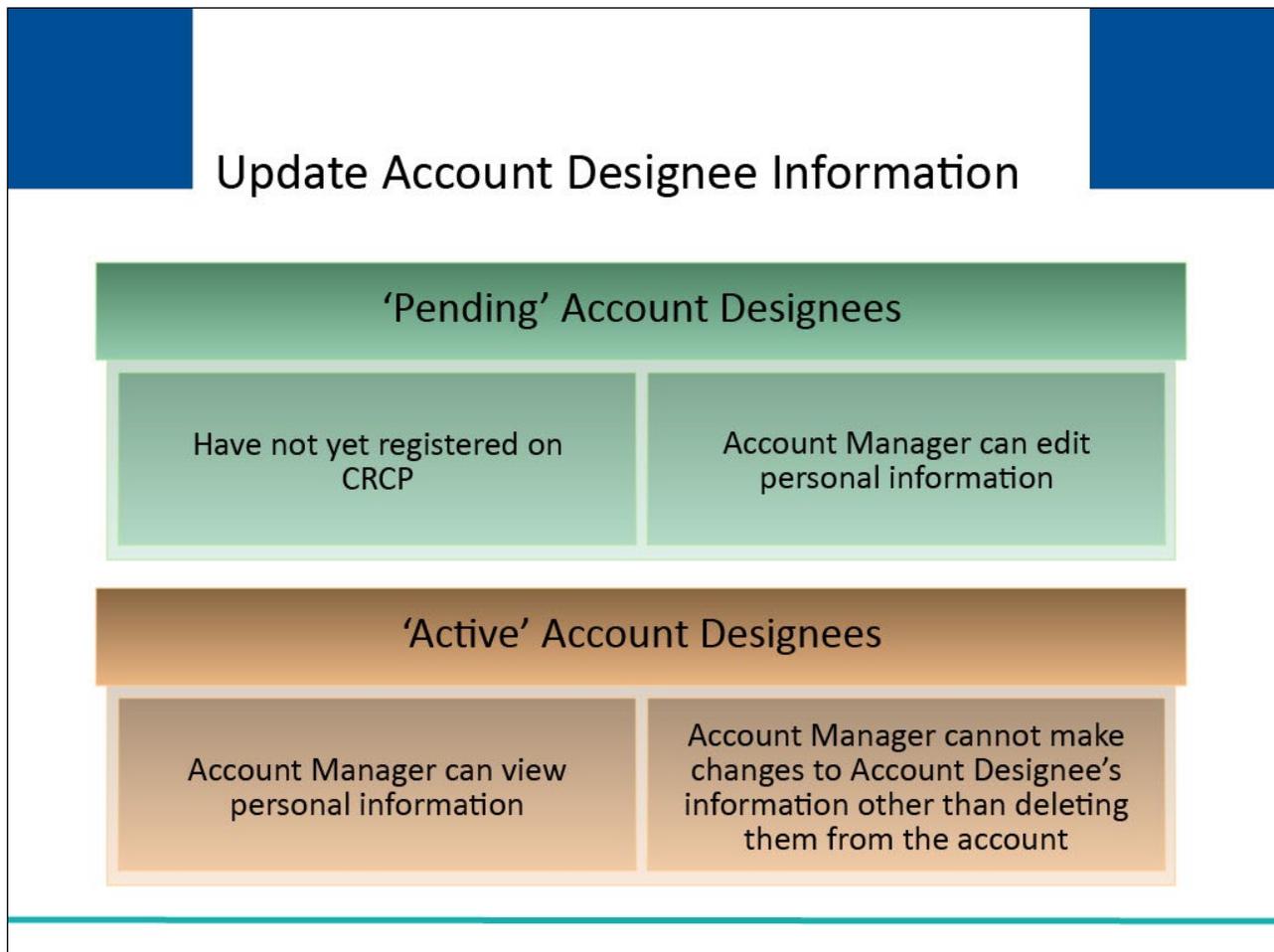
Slide notes

Account Designees in 'Pending' status have not yet registered on the CRCP. An Account Manager can edit personal information for Account Designees in 'Pending' status.

Account Managers can only view personal information for Account Designees in 'Active' status. Once the Account Designee has registered and has a Login ID, the Account Manager cannot make changes to the Account Designee's information other than deleting the Account Designee from the account.

Slide 18 of 30 - Account Designee Listing Page

Slide notes

To make changes to an Account Designee's personal information in 'Pending' status, go to the Account Designee Listing page and click the last name of the individual whose information you wish to update.

Slide 19 of 30- Update Account Designee Information Page

Slide notes

The Update Account Designee Information page will appear. The personal information previously entered for the Account Designee is shown and is open for editing. Revise any information as needed and click Continue.

Slide 20 of 30 - Update Account Designee Confirmation Page

Slide notes

The Account Designee's personal information is updated and the Update Account Designee Confirmation page will appear.

Slide 21 of 30 - Regenerate Invitation Email

Regenerate Invitation Email

- If Account Designee misplaces/deletes email

    ▪ Account Manager can regenerate email

- Previously-generated link will no longer work once new email is generated

- Invitations only regenerated for Account Designees in 'Pending' status

Slide notes

If the Account Designee has misplaced or deleted the invitation email, it can be regenerated. The token link in the previous invitation email will no longer work once a new email is generated. Invitation emails can only be regenerated for Account Designees in 'Pending' status.

Slide 22 of 30 - Account Designee Listing Page

Slide notes

To regenerate the invitation email, go to the Account Designee Listing page and click the last name of the individual that needs the email regenerated.

Slide 23 -of 30 - Update Account Designee Information Page

Slide notes

The Update Account Designee Information page will appear. Select the Regenerate invitation email check box beneath the Account Designee's personal information and then click Continue.

Slide 24 of 30 - Account Designee Listing Page

Slide notes

The Account Designee Listing page will re-appear. The system re-generates the invitation email and sends it to the email address registered for the Account Designee.

To remove an Account Designee from the CRCP account, click the X next to the individual's name.

Slide 25 of 30 - Delete Account Designee Confirmation Page

Slide notes

The Delete Account Designee Confirmation page will appear. If you do not want to delete this Account Designee from the CRCP account, click Cancel to return to the Account Designee Listing page. The Account Designee will still be listed with their status unchanged.

Slide 26 of 30- Account Designee Listing Page

Slide notes

The Account Designee Listing page will appear. The Account Designee that was deleted will no longer appear on the listing and will no longer be able to access this CRCP account. Note: The Account Designee will not be deleted from any other account they are associated with.

Slide 27 of 30 - Assistance

Slide notes

If you are unable to add, update, or delete an Account Designee from your account, please contact an Electronic Data Interchange or EDI Representative. EDI Representatives are available at: (646) 458-6740.

Slide 28 of 30 - Course Summary

Course Summary

- How an Account Manager oversees Account Designees

  - Invite/add an Account Designees to a CRCP

  - Update Account Designee information

    - Re-generate invitation email
  - Delete an Account Designee from a CRCP account

SUMMARY

Slide notes

This course explained how the Account Manager can invite or add individuals (Account Designees) to assist with a CRCP account. It described how to update Account Designee information and how to re-generate the invitation email. It also explained how to delete Account Designees from an account.

Slide 29 of 30- Conclusion

Slide notes

You have completed the CRCP Account Designee Maintenance 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 30 of 30 - 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.