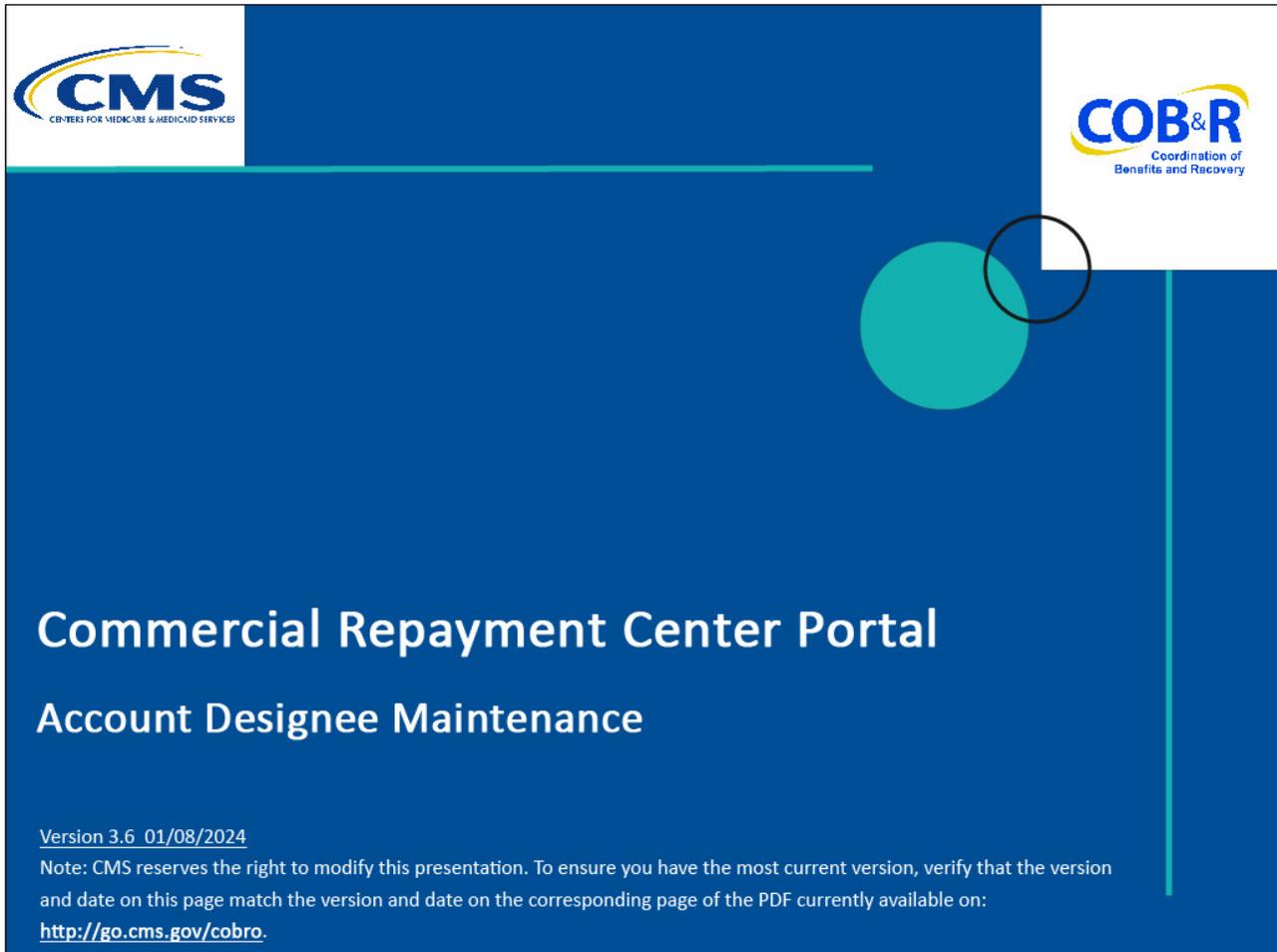


Account Designee Maintenance

Slide 1 of 30 - Account Designee Maintenance



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). A large teal circle is positioned on the right side, partially overlapping the COB&R logo. A thin teal horizontal line is located below the CMS logo, and a thin teal vertical line is located to the right of the COB&R logo.

Commercial Repayment Center Portal

Account Designee Maintenance

[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 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

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: <https://www.cob.cms.hhs.gov/CRCP/>.

Slide 3 of 30 - Course Overview

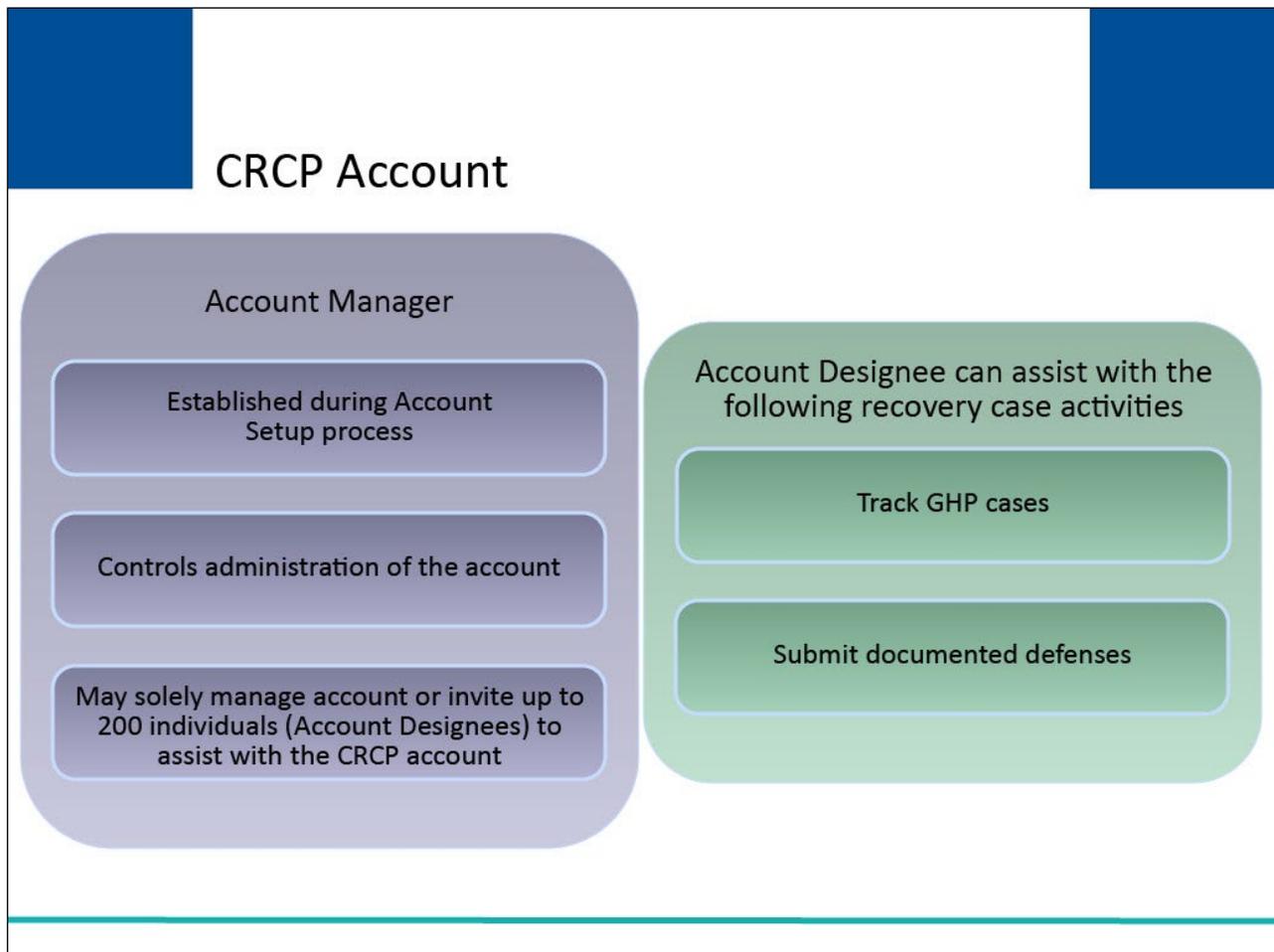
Course Overview

- 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

Print this page

CMS Commercial Repayment Center Portal **COB&R**
CENTERS FOR MEDICARE & MEDICAID SERVICES Coordination of Benefits and Recovery

Login Warning

UNAUTHORIZED ACCESS TO THIS COMPUTER SYSTEM IS PROHIBITED BY LAW

This warning banner provides privacy and security notices consistent with applicable federal laws, directives, and other federal guidance for accessing this Government system, which includes: (1) this computer network, (2) all computers connected to this network, and (3) all devices and storage media attached to this network or to a computer on this network. This system is provided for Government-authorized use only. Unauthorized or improper use of this system is prohibited and may result in disciplinary action, and/or civil and criminal penalties.

Personal use of social media and networking sites on this system is limited as to not interfere with official work duties and is subject to monitoring

By using this system, you understand and consent to the following:

- *You have no reasonable expectation of privacy regarding any communication or data transiting or stored on this system.
- *The Government may monitor, record, and audit your system usage, including usage of personal devices and email systems for official duties or to conduct HHS business. Therefore, you have no reasonable expectation of privacy regarding any communication or data transiting or stored on this system. At any time, and for any lawful Government purpose, the Government may monitor, intercept, and search and seize any communication or data transiting or stored on this system.
- *Any communication or data transiting or stored on this system may be disclosed or used for any lawful Government purpose.

<http://www.cms.hhs.gov/About-CMS/Agency-Information/Aboutwebsite/Security-Protocols.html>

Privacy Act Statement

The collection of this information is authorized by Section 1862(b) of the Social Security Act (codified at 42 U.S.C 1395y(b)) (see also 42, C.F.R. 411.24). The information collected will be used to identify and recover past conditional and mistaken Medicare primary payments and to prevent Medicare from making mistaken payments in the future for those Medicare Secondary Payer situations that continue to exist.

Attestation of Information

The information provided is complete, truthful, accurate, and meets all requirements set forth to use this process; and, I have read and understand all of the Centers for Medicare & Medicaid Services information at <https://www.cms.gov/Medicare/Coordination-of-Benefits-and-Recovery/Coordination-of-Benefits-and-Recovery-Overview/CRCP/Commercial-Repayment-Center-Portal-.html>

LOG OFF IMMEDIATELY if you do not agree to the conditions stated in this warning.

CMS/HHS Vulnerability Disclosure Policy | Privacy Policy | User Agreement | Adobe Acrobat

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

Welcome to the CRCP

The Commercial Repayment Center Portal (CRCP) is a secure web-based system that provides Employers/Other Plan Sponsors and Insurers/Third Party Administrators with a way to manage their Group Health Plan (GHP) recovery activities more efficiently. With the use of this portal, users may view demand information on line and submit defense documentation electronically.

For information about the availability of auxiliary aids and services, please visit:
<http://www.medicare.gov/about-us/nondiscrimination/nondiscrimination-notice.html>

CRCP Messages

The CRCP will be unavailable nightly from approximately midnight - 4am Eastern Standard Time.

Getting Started

Registration is required to use this application. Your **Authorized Representative** must complete the *New Registration (PIN Request)* and your **Account Manager** must complete the *Account Setup*. These individuals cannot be the same person.

The **Authorized Representative (AR)** is the person in your organization who has the legal authority to bind your organization to a contract and to the terms of CRCP requirements. This is usually a senior executive or partner of your company or firm. The AR has ultimate accountability for the information submitted on the CRCP.

The **Account Manager (AM)** is the person who will actively manage the GHP case workload for the account. This includes inviting **Account Designees (ADs)** and managing their access to the account.

For more information on the registration process and CRCP user roles, please refer to the *How to Get Started* help document, located under the *How To* menu on the Navigation bar. To begin the registration process, your CRCP Authorized Representative will click the **New Registration (PIN Request)** button.

Step 1

New Registration (PIN Request)

(Letter ID and TIN required)

Step 2

Account Setup

(Account ID and PIN required)

Sign in to your account:

Login ID:

[Forgot Login ID](#)

Password:

[Forgot Password](#)

Login

Clear

2-Factor Login

Developer Note: To demonstrate 2-Factor login.

CMS/HHS Vulnerability Disclosure Policy | Privacy Policy | User Agreement | Adobe Acrobat

Slide notes

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

Slide 7 of 30 - Account Listing Page

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 to confirm your identity with Experian Credit Services (an outside entity). This information 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
11111111 🌿	CIGNA	View TINs Listing
22222222	United Health Care	View TINs Listing

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

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

Account Detail Quick Help

You have selected Account ID: 11111111 - CIGNA

Information associated to this Account ID will be presented on applicable pages in the Commercial Repayment Center Portal. You may access these pages using the links provided on this page.

If you would like to access a different Account ID, click [Previous](#) or Home. When the Account Listing page displays, select the Account ID you would like to access.

Available Actions

To view demands/case information or to submit defense documentation, click this link: Demand Listing	To search for a case associated to this Account ID, click this link: Case Search	To request access to information related to a letter that is not yet associated to this Account ID, click this link: Request Letter Access
To request/update paperless preferences for this account, click this link: Go Paperless	To view/print "Go Paperless" letter notification e-mails and letters, click this link: Letter Notifications	To view all cases that have an Accounts Receivable amount greater than zero, click this link: Open Debt Report

To remove access related to a letter associated to this Account ID, the Account Manager for this Account must contact an EDI Representative at the Benefits Coordination Recovery Center (BCRC) and provide them with key information from the letter that should be removed. EDI Representatives can be reached at: (646) 458-6740.

[Previous](#)

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

The screenshot shows the 'Account Detail' page of the 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). A navigation bar includes links for Home, User Options, Account Settings (highlighted with a red box), About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Log off. A dropdown menu for 'Account Settings' is open, with 'Designee Maintenance' selected and highlighted with a red box. Other options in the menu include 'Update Authorized Representative (AR) Information', 'View Associated TINs', and 'View Account Activity'. The main content area is titled 'Account Detail' and includes a 'Quick Help' icon. Below the title, there is a section for 'Available Actions' with six buttons: 'Demand Listing', 'Case Search', 'Request Letter Access', 'Go Paperless', 'Letter Notifications', and 'Open Debt Report'. At the bottom left, there is a 'Previous' button.

Slide notes

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

Slide 10 of 30 - Account Designee Listing Page

The screenshot shows the 'Account Designee Listing' page. At the top, there are navigation links: Home, User Options, Account Settings, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Log off. The page title is 'Account Designee Listing' with a 'Quick Help' link. Below the title, there is a paragraph explaining that individuals listed were invited to be Account Designees for Account ID: 111111. It also provides instructions on how to add, edit, or delete designees. A 'Total Number of Account Designees: 3' is displayed. A 'Clear Filters' button is present. Below this is a table with columns: Delete, Last Name, First Name, E-mail Address, Passphrase, Status, and Last Login Date. The table contains three rows of data. At the bottom of the table area, there are 'Cancel' and 'Add Designee' buttons. A footer contains links for CMS/HHS Vulnerability Disclosure Policy, Privacy Policy, User Agreement, and Adobe Acrobat.

Delete	Last Name	First Name	E-mail Address	Passphrase	Status	Last Login Date
X	Jones	Ben	benj@comapny.com		Active	04/18/2018
X	Carey	Micheal	cmicheal@domain.com	letmein	Pending	
X	Deans	Micheal	cmicheal@domain.com	letmein	Pending	

Slide notes

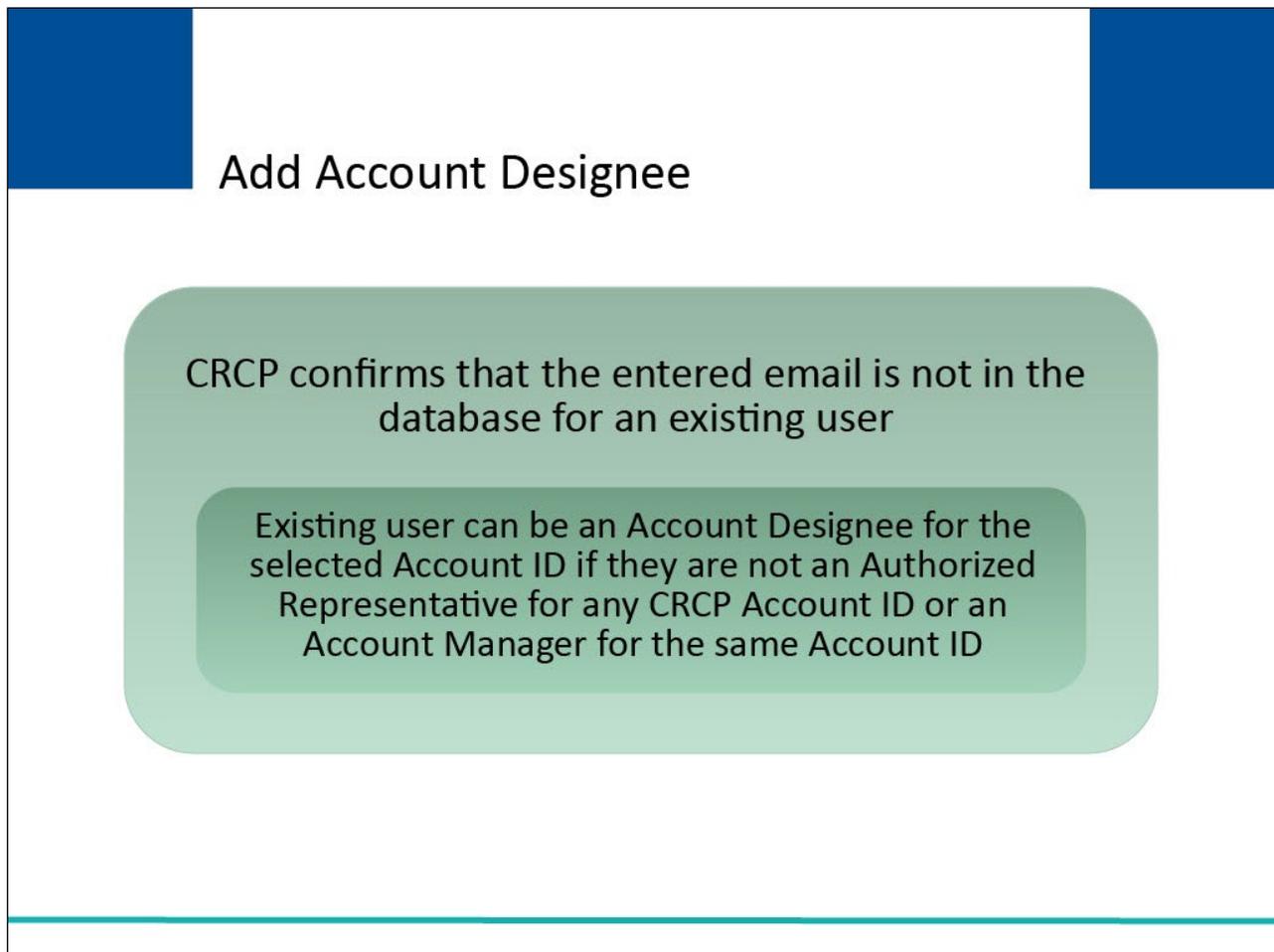
The Account Designee Listing page will appear. This page lists all designees that have been invited or assigned to the account. To add an Account Designee, you must first invite them. To begin this process, click Add Designee.

Slide 11 of 30 - Account Designee Information Page

The screenshot shows the 'Account Designee Invitation' page. At the top, there are logos for CMS (Centers for Medicare & Medicaid Services), Commercial Repayment Center Portal, 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 Designee Invitation' and includes a 'Quick Help' link. The text explains the invitation process and provides instructions on how to proceed. Below the text is a form with four required fields: Designee First Name, Designee Last Name, Passphrase, and Re-enter Passphrase. At the bottom of the form are three buttons: 'Previous', 'Cancel', and 'Continue'. A footer contains links to CMS/HHS Vulnerability Disclosure Policy, Privacy Policy, User Agreement, and Adobe Acrobat.

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

Add Account Designee

CRCP confirms that the entered email is not in the database for an existing user

Existing user can be an Account Designee for the selected Account ID if they are not an Authorized Representative for any CRCP Account ID or an Account Manager for the same Account ID

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 (MSRP) 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

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

CMS Commercial Repayment Center Portal **COB&R**
CENTERS FOR MEDICARE & MEDICAID SERVICES Coordination of Benefits and Recovery

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

Account Designee Invitation [Quick Help](#)

Please provide the Name and Passphrase for the individual that you would like to invite to be an Account Designee for this Account ID. The Passphrase can be any sequence of words or text. It is case-sensitive and can be up to 30 characters long.

After you complete the invitation process, contact your Account Designee and provide them with the Passphrase. They will need to enter it exactly as you did when they follow the link in their invitation e-mail to register for the Commercial Repayment Center Portal (CPRP).

Click **Continue** to proceed with the invitation process. Click **Cancel** to transfer to the Account Designee Listing page without inviting this individual to become an Account Designee for this Account ID.

All fields are required.

* Designee First Name:	<input type="text"/>
* Designee Last Name:	<input type="text"/>
* Passphrase:	<input type="text"/>
* Re-enter Passphrase:	<input type="text"/>

[Previous](#) [Cancel](#) [Continue](#)

[CMS/HHS Vulnerability Disclosure Policy](#) | [Privacy Policy](#) | [User Agreement](#) | [Adobe Acrobat](#)

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

The screenshot shows the 'Account Designee 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 has a title 'Account Designee Confirmation' and a 'Quick Help' link. The text explains that the individual has been successfully added to the account and provides instructions for the invited designee. Below the text is a table with the following information:

Account Designee First Name:	John
Account Designee Last Name:	Carney
Account Designee E-mail:	firstname.lastname@maildomain.com

At the bottom of the table area is a green 'OK' button. A footer contains links for CMS/HHS Vulnerability Disclosure Policy, Privacy Policy, User Agreement, and Adobe Acrobat.

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

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

CMS Commercial Repayment Center Portal **COB&R**
CENTERS FOR MEDICARE & MEDICAID SERVICES Coordination of Benefits and Recovery

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

Account Designee Listing [Quick Help](#)

The individuals listed on this page were invited to be Account Designees for Account ID: 111111. As an Account Manager, you can Add, Edit, or Delete Account Designees.

To invite an individual to become an Account Designee for this Account ID, click the **Add Designee** button. Individuals who are added as Designees will receive an e-mail notifying them that they have been invited to be an Account Designee for this Account. To edit an Account Designee's personal information, click their Last Name. Note: You can only edit Account Designee's in Pending Status. To delete a Designee from this Account ID, click the [X] to the left of their name.

Click **Cancel** to transfer to the Account Detail page.

Total Number of Account Designees: 3

[Clear Filters](#)

Delete	Last Name	First Name	E-mail Address	Passphrase	Status	Last Login Date
X	Jones	Ben	benj@comapny.com		Active	04/18/2018
X	Carey	Micheal	cmicheal@domain.com	letmein	Pending	
X	Deans	Micheal	cmicheal@domain.com	letmein	Pending	

[Cancel](#) [Add Designee](#)

CMS/HHS Vulnerability Disclosure Policy | Privacy Policy | User Agreement | Adobe Acrobat

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

Invitation Email

From: DoNotReply@cob.cms.hhs.gov [mailto:DoNotReply@cob.cms.hhs.gov]
Sent: Tuesday, July 22, 2014 10:09 AM
To: [REDACTED]
Cc: [REDACTED]
Subject: Designee Invitation

*** PLEASE DO NOT REPLY TO THIS EMAIL ***

Dear [REDACTED]:

You have been invited by: [REDACTED], for Account ID: [REDACTED], to participate in the Commercial Repayment Center Portal (CRCP) web portal process. Please follow this link to register: <https://qua.cob.cms.hhs.gov/CRCP/designeeRegistration?token=Ht,qwZlbMNZtFl>. If you have already registered, please visit the Commercial Repayment Center Portal Welcome Page at <https://cob.cms.hhs.gov/CRCP/> to login.

For any questions or problems please contact the person named in the paragraph above.

This electronic message transmission is intended only for the person or entity to which it is addressed and may contain information that is privileged, confidential or otherwise protected from disclosure. If you have received this transmission, but are not the intended recipient, you are hereby notified that any disclosure, copying, distribution or use of the contents of this information is strictly prohibited. If you have received this e-mail in error, please contact the BCRC Electronic Data Interchange (EDI) Department: at (616) 438 6710 and delete and destroy the original message and all copies.

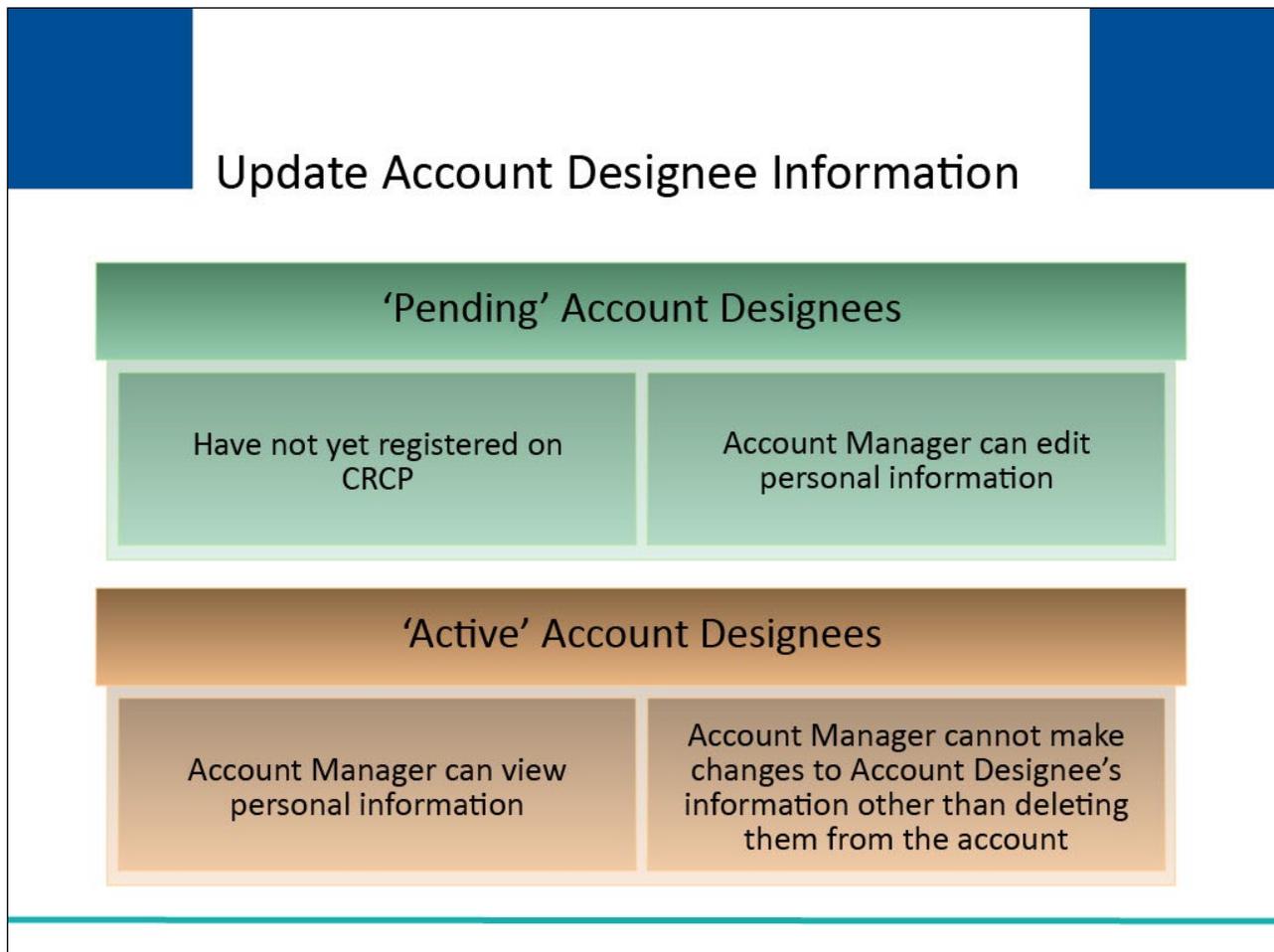
Slide notes

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

The screenshot shows the 'Account Designee Listing' page in the CMS Commercial Repayment Center Portal. The page header includes the CMS logo, the portal name, and the COB&R logo. A navigation menu contains 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 'Quick Help' link and instructions for managing account designees for Account ID 111111. It states that users can Add, Edit, or Delete designees. A 'Total Number of Account Designees: 3' is displayed, along with a 'Clear Filters' button. A table lists three designees: Ben Jones (Active), Micheal Carey (Pending), and Micheal Deans (Pending). The 'Micheal Carey' row is highlighted with a red border. Below the table are 'Cancel' and 'Add Designee' buttons. The footer contains links for CMS/HHS Vulnerability Disclosure Policy, Privacy Policy, User Agreement, and Adobe Acrobat.

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

CMS Commercial Repayment Center Portal **COB&R**
CENTERS FOR MEDICARE & MEDICAID SERVICES Coordination of Benefits and Recovery

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

Account Designee Listing [Quick Help](#)

The individuals listed on this page were invited to be Account Designees for Account ID: 111111. As an Account Manager, you can Add, Edit, or Delete Account Designees.

To invite an individual to become an Account Designee for this Account ID, click the **Add Designee** button. Individuals who are added as Designees will receive an e-mail notifying them that they have been invited to be an Account Designee for this Account. To edit an Account Designee's personal information, click their Last Name. Note: You can only edit Account Designee's in Pending Status. To delete a Designee from this Account ID, click the [X] to the left of their name.

Click **Cancel** to transfer to the Account Detail page.

Total Number of Account Designees: 3

[Clear Filters](#)

Delete	Last Name	First Name	E-mail Address	Passphrase	Status	Last Login Date
X	Jones	Ben	benj@comapny.com		Active	04/18/2018
X	Carey	Micheal	cmicheal@domain.com	letmein	Pending	
X	Deans	Micheal	cmicheal@domain.com	letmein	Pending	

[Cancel](#) [Add Designee](#)

[CMS/HHS Vulnerability Disclosure Policy](#) | [Privacy Policy](#) | [User Agreement](#) | [Adobe Acrobat](#)

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

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

CMS Commercial Repayment Center Portal **COB&R**
CENTERS FOR MEDICARE & MEDICAID SERVICES Coordination of Benefits and Recovery

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

Update Account Designee Information [Quick Help](#)

The information currently associated with the selected Account Designee is displayed. The Account Manager may update any of this information and if needed, regenerate the invitation e-mail to the Account Designee.

Click **Continue** to submit your changes or click **Cancel** to transfer to the Account Designee Listing page without submitting your changes.

An asterisk (*) indicates a required field.

* Account Designee First Name:	Sample First
* Account Designee Last Name:	Sample Last
* Account Designee E-mail Address:	firstname.lastname@domain.com
* Re-enter Account Designee E-mail Address:	
* Passphrase:	welcome
* Re-enter Passphrase:	

Regenerate invitation e-mail with new token link for Account Designee

[Cancel](#) [Continue](#)

CMS/HHS Vulnerability Disclosure Policy | Privacy Policy | User Agreement | Adobe Acrobat

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

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

CMS Commercial Repayment Center Portal **COB&R**
CENTERS FOR MEDICARE & MEDICAID SERVICES Coordination of Benefits and Recovery

[Home](#) [User Options](#) [Account Settings](#) [About This Site](#) [CMS Links](#) [How To...](#) [Reference Materials](#) [Contact Us](#) [Log off](#)

Update Account Designee Confirmation [Quick Help](#)

The information for the following Designee has been successfully updated.
Click the **Continue** button to return to the Account Designee Listing page.

Designee First Name:	Sample First
Designee Last Name:	Sample Last
Designee E-mail Address:	firstname.lastname@maildomain.com

[Continue](#)

[CMS/HHS Vulnerability Disclosure Policy](#) | [Privacy Policy](#) | [User Agreement](#) | [Adobe Acrobat](#)

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

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

CMS Commercial Repayment Center Portal **COB&R**
CENTERS FOR MEDICARE & MEDICAID SERVICES Coordination of Benefits and Recovery

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

Account Designee Listing [Quick Help](#)

The individuals listed on this page were invited to be Account Designees for Account ID: 111111. As an Account Manager, you can Add, Edit, or Delete Account Designees.

To invite an individual to become an Account Designee for this Account ID, click the **Add Designee** button. Individuals who are added as Designees will receive an e-mail notifying them that they have been invited to be an Account Designee for this Account. To edit an Account Designee's personal information, click their Last Name. Note: You can only edit Account Designee's in Pending Status. To delete a Designee from this Account ID, click the [X] to the left of their name.

Click **Cancel** to transfer to the Account Detail page.

Total Number of Account Designees: 3

[Clear Filters](#)

Delete	Last Name	First Name	E-mail Address	Passphrase	Status	Last Login Date
X	Jones	Ben	benj@comapny.com		Active	04/18/2018
X	Carey	Micheal	cmicheal@domain.com	letmein	Pending	
X	Deans	Micheal	cmicheal@domain.com	letmein	Pending	

[Cancel](#) [Add Designee](#)

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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

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

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CENTERS FOR MEDICARE & MEDICAID SERVICES Coordination of Benefits and Recovery

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Update Account Designee Information [Quick Help](#)

The information currently associated with the selected Account Designee is displayed. The Account Manager may update any of this information and if needed, regenerate the invitation e-mail to the Account Designee.

Click **Continue** to submit your changes or click **Cancel** to transfer to the Account Designee Listing page without submitting your changes.

An asterisk (*) indicates a required field.

* Account Designee First Name:	Sample First
* Account Designee Last Name:	Sample Last
* Account Designee E-mail Address:	firstname.lastname@domain.com
* Re-enter Account Designee E-mail Address:	
* Passphrase:	welcome
* Re-enter Passphrase:	

Regenerate invitation e-mail with new token link for Account Designee

Cancel **Continue**

CMS/HHS Vulnerability Disclosure Policy | Privacy Policy | User Agreement | Adobe Acrobat

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

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

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Account Designee Listing [Quick Help](#)

The individuals listed on this page were invited to be Account Designees for Account ID: 111111. As an Account Manager, you can Add, Edit, or Delete Account Designees.

To invite an individual to become an Account Designee for this Account ID, click the **Add Designee** button. Individuals who are added as Designees will receive an e-mail notifying them that they have been invited to be an Account Designee for this Account. To edit an Account Designee's personal information, click their Last Name. Note: You can only edit Account Designee's in Pending Status. To delete a Designee from this Account ID, click the [X] to the left of their name.

Click **Cancel** to transfer to the Account Detail page.

Total Number of Account Designees: 3

[Clear Filters](#)

Delete	Last Name	First Name	E-mail Address	Passphrase	Status	Last Login Date
X	Jones	Ben	benj@comapny.com		Active	04/18/2018
X	Carey	Micheal	cmicheal@domain.com	letmein	Pending	
X	Deans	Micheal	cmicheal@domain.com	letmein	Pending	

[Cancel](#) [Add Designee](#)

CMS/HHS Vulnerability Disclosure Policy | Privacy Policy | User Agreement | Adobe Acrobat

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

The screenshot shows the 'Delete Account Designee Confirmation' page within the Commercial Repayment Center Portal. The page header includes the CMS logo (Centers for Medicare & Medicaid Services), the portal title 'Commercial Repayment Center Portal', and the COB&R logo (Coordination of Benefits and Recovery). A navigation menu contains 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 'Delete Account Designee Confirmation' with a 'Quick Help' link. Below the title is a confirmation message: 'Please review the information displayed on this page to confirm that this individual should no longer have access to Account ID: 11111111. Click OK to proceed with the delete request. This will remove this individual's access to this Account ID only. The Account Designee will retain access to all other Account IDs to which he/she is currently associated. Click Cancel to transfer to the Account Designee Listing page without deleting this individual from this Account ID.' The designee information is listed as: Designee First Name: John, Designee Last Name: Carey, and Designee E-mail: johnc@company.com. At the bottom of the confirmation area are 'Cancel' and 'OK' buttons. A footer contains links for CMS/HHS Vulnerability Disclosure Policy, Privacy Policy, User Agreement, and Adobe Acrobat.

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

The screenshot shows the 'Account Designee Listing' page in the CMS Commercial Repayment Center Portal. The page header includes the CMS logo, the portal name, and the COB&R logo. A navigation bar contains 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 Designee Listing' and includes a 'Quick Help' link. Below the title, there is explanatory text about account designees for Account ID 111111, instructions on how to add, edit, or delete designees, and a 'Cancel' button to return to the Account Detail page. It also states that there are 3 total account designees. A 'Clear Filters' button is present above a table with columns for Delete, Last Name, First Name, E-mail Address, Passphrase, Status, and Last Login Date. The table lists three designees: Ben Jones (Active), Micheal Carey (Pending), and Micheal Deans (Pending). At the bottom of the table area are 'Cancel' and 'Add Designee' buttons. 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](#)

CMS Commercial Repayment Center Portal **COB&R**
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Account Designee Listing [Quick Help](#)

The individuals listed on this page were invited to be Account Designees for Account ID: 111111. As an Account Manager, you can Add, Edit, or Delete Account Designees.

To invite an individual to become an Account Designee for this Account ID, click the **Add Designee** button. Individuals who are added as Designees will receive an e-mail notifying them that they have been invited to be an Account Designee for this Account. To edit an Account Designee's personal information, click their Last Name. Note: You can only edit Account Designee's in Pending Status. To delete a Designee from this Account ID, click the [X] to the left of their name.

Click **Cancel** to transfer to the Account Detail page.

Total Number of Account Designees: 3

[Clear Filters](#)

Delete	Last Name	First Name	E-mail Address	Passphrase	Status	Last Login Date
X	Jones	Ben	benj@comapny.com		Active	04/18/2018
X	Carey	Micheal	cmicheal@domain.com	letmein	Pending	
X	Deans	Micheal	cmicheal@domain.com	letmein	Pending	

[Cancel](#) [Add Designee](#)

[CMS/HHS Vulnerability Disclosure Policy](#) | [Privacy Policy](#) | [User Agreement](#) | [Adobe Acrobat](#)

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

Assistance

Contact EDI Representative for assistance with Account Designee maintenance



EDI Representative phone:

(646) 458-6740

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

**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



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 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



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

Slide notes

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