

Request Letter Access

Slide 1 of 21 - Request Letter Access

CMS
CENTERS FOR MEDICARE & MEDICAID SERVICES

COB&R
Coordination of
Benefits and Recovery

Commercial Repayment Center Portal (CRCP)

Request Letter Access

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<http://go.cms.gov/cobro>.

Slide notes

Welcome to the Commercial Repayment Center Portal (CRCP) Request Letter Access course.

Slide 2 of 21 - 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: [CRCP Website](https://www.cob.cms.hhs.gov/CRCP/).

Slide 3 of 21 - Course Overview

Course Overview

- Request Letter Access process
 - How to associate data related to a letter to your CRCP account
- Remove Letter information from your CRCP account



Slide notes

This course will explain how to use the Request Letter Access process to associate data related to a letter to your CRCP account.

This course will also explain how to remove letter information that was incorrectly associated to your CRCP account.

Slide 4 of 21 - Request Letter Access

Request Letter Access

- Used to request Demand or Defense information that is not available on the CRCP for your account
- Once the request is validated, information from the requested letter and related letters will be made available on the CRCP
- Note: If you add letter information to the incorrect account, your Account Manager will need to contact an EDI Representative for assistance

**Slide notes**

The CRCP associates information related to letters you have received from the Commercial Repayment Center (CRC) to your Account ID as part of the initial New Registration (PIN Request) and Account Setup process.

If you cannot find information for a Demand or Defense letter on your CRCP account, you can request access to this data via the Request Letter Access process.

Once the CRCP validates your request, information from the requested letter, as well as information from all related letters, will be available on the CRCP.

Note: If you mistakenly associate letter information to the incorrect account, your Account Manager will need to contact an Electronic Data Interchange (EDI) Representative to disassociate the information.

Slide 5 of 21 - Request Letter Access

Request Letter Access

- Ensure you are in the correct account by viewing the Account ID at the top of *Account Detail* page
 - Return to *Account Listing* page, as needed, to verify company name and/or TIN information



Slide notes

Before requesting letter access, first ensure that you are in the correct CRCP account (i.e., if you are associated to more than one account).

The Account ID is listed at the top of the Account Detail page.

From this page, click Previous to return to the Account Listing page where you can verify the company name and or Tax Identification Number (TIN) information.

Slide 6 of 21 - Login Warning Page

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.

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Slide notes

To log into the CRCP, access the following link: [CRCP Website](#). The Login Warning page will appear. After reviewing the user agreement, click I Accept to access the CRCP login page.

Slide 7 of 21 - Account Detail

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](#)

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Slide notes

Once you login and access the CRCP, from the Account Detail page, select 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 8 of 21 - Demand Listing Page

The screenshot shows the 'Demand Listing' page with a navigation bar at the top containing links like Home, User Options, Account Settings, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Log off. Below the navigation bar is a 'Quick Help' icon. The main content area is titled 'Demand Listing' and contains a search section with the following fields:

- 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

Search and Clear buttons are located to the right of the date fields. Below the search section, the page indicates 'Demand Letters Issued to Companies Associated with Account ID: 111111' and 'Results Returned: 5'. A message states: '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.'

The table below is titled 'Demand Listing Not Sorted' and has the following columns: Viewed, Demand Letter ID, Number of Cases, Letter Date, and Demand Status.

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

An 'Account Detail' button is located below the table. At the bottom of the page, there is a footer with links for 'CMS/HHS Vulnerability Disclosure Policy', 'Privacy Policy', 'User Agreement', and 'Adobe Acrobat'.

Slide notes

If you are on the Demand Listing page and have Listing confirmed that you are in the correct account, but still cannot find information for a demand, remember that by default, this page lists all unresolved/open demands that were issued in the past 3 months. However, you may use search for older demands.

Use the search function to confirm that the demand you are looking for has not yet been associated to your account.

Note: If the status for the demand letter is closed, you will not be able to view case specific information for the demand. If the demand is open and you are logged in using Multi-Factor Authentication (MFA), you will have the option to view and/or print the demand letter. For more information on MFA, please see the Multi-Factor Authentication CBT.

The Request Letter Access process will not make this information available to you. Contact the CRC at 1-855-798-2627 for additional information regarding a demand that has been closed.

Slide 9 of 21 - Demand Detail Page

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	63	*****4456A	Elizabeth	Florence	\$16,900.00	Open		Yes	02/27/2019	A2562	Intent to Refer Letter Sent
C1234560004	23	*****2244A	Frances	Christobell	\$400.00	Open		Yes			
C1234560005	263	*****3365A	Blaxton	Jasper	\$14,000.00	Closed	05/10/2016	Yes	04/24/2018	N2568	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 will appear. The Demand Letter ID and Total Demand Amount originally included on the demand letter are displayed at the top of the page.

The Employer Name, Employer TIN, Insurer Name, and Insurer TIN associated with the Demand Letter ID are also displayed.

This page lists all the beneficiaries included in the demand letter. The number of beneficiaries is displayed in the "Results Returned".

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

Note: Additional treasury information has now been added including Treasury Referral Date, Treasury Account Number, and Current Status of Debt.

Slide 10 of 21 - Submitted Defense Documents Page

Submitted Defense Documents [Quick Help](#)

All defense documents that have been submitted through the CRCP for Demand Letter ID: 86620372 are listed on this page. You may search for a defense document and/or view a list of beneficiaries who were associated to a defense document.

To search for a defense document(s), enter your criteria and then click **Search**.

Filename: [Filename Search Hint](#)

Submitted By: [Submitted By Search Hint](#)

Submitted Date From: / / (MM/DD/YYYY)

Submitted Date To: / / (MM/DD/YYYY) [From and To Date Search Hint](#)

Defense Documents **Results Returned: 3**

To view/hide the list of beneficiaries who were included in a submitted defense document, click the View/Hide link under the Associated Beneficiaries column. Once the list of Case IDs associated with the file appears, you may click the Case ID link to see the status of submitted defenses.

Submitted Defense Documents Not Sorted			
Filename	Submitted Date	Submitted By	Associated Beneficiaries
TEST-2.PDF	08/15/2014	AM254QA	View/Hide
TEST-2-3.PDF	08/15/2014	AM111QA	View/Hide
TEST-2-3-4.PDF	08/15/2014	AM135QA	View/Hide
TEST-2-3-4.PDF	08/15/2014	AM555QA	View/Hide
TEST.PDF	08/14/2014	AM254QA	View/Hide

[Demand Listing](#)

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Slide notes

If you are on the Submitted Defense Documents page and cannot find information for a defense you submitted, remember that the Submitted Defense Documents page only lists defense documents that have been submitted through the CRCP.

Slide 11 of 21 - Account Listing Page

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

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CENTERS FOR MEDICARE & MEDICAID SERVICES Coordination of Benefits and Recovery

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 you have confirmed that the letter you need to view has not yet been associated to the desired account, begin the request letter access process, by first logging into the CRCP at the following link: [CRCP Website](#). After a successful login, the Account Listing page will appear.

The Account Listing page lists the accounts associated to your Login ID. Select the Account ID link for the account you want to associate the letter data to.

Slide 12 of 21 - Account Detail Page

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. It states that the user has selected Account ID 11111111 - CIGNA and provides instructions on how to access account information. Below this, there is a section for 'Available Actions' with six buttons: Demand Listing, Case Search, Request Letter Access (highlighted with a red border), Go Paperless, Letter Notifications, and Open Debt Report. At the bottom, there is a 'Previous' button and a note about removing access to letters.

Slide notes

The Account Detail page will appear. Click the Request Letter Access link.

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

Slide 13 of 21 - Request Letter Access Page

Request Letter Access ? Quick Help

You may submit a request to associate data related to a Demand or Defense letter you received from the Commercial Repayment Center (CRC) that is not currently available on the portal for this Account ID. To associate this data, enter the information requested on this page and click **Continue**.

Once validated, information from the requested letter, as well as information from all related letters will be available on the Demand Listing and other applicable pages for this Account ID. The Tax Identification Number (TIN) will be associated to this account and will have the same "Go Paperless" option as the account. Click **Cancel** to return to the Account Detail page without submitting your request.

Letter Information

Enter and re-enter the Letter ID from the letter you want to access: [Entry Hint](#)

*Letter ID:	<input type="text"/>
*Re-enter Letter ID:	<input type="text"/>
*Tax Identification Number	<input type="text"/>

* Select the type of letter you are using to associate information to your account and provide the required key piece of data for that letter type: [Entry Hint](#)

<input type="radio"/> Defense Letter - Enter the Case ID:	<input type="text"/>
<input type="radio"/> Demand Letter - Enter the Total Debt Due printed on the letter:	\$ <input type="text"/> . <input type="text"/>

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Slide notes

The CRCP will display the Request Letter Access page. You will use this page to submit your request. All fields designated with an asterisk are required.

Enter and re-enter the Letter ID for the letter that is not currently available on your account. The Letter ID is a number that begins with '86'.

This number can be found in the upper left corner of the Defense or Demand letter in the "Regarding" section.

You must enter all numbers when you are keying the Letter ID on this page. Spaces and special characters are not allowed.

Note: The Request Letter Access page has now been updated to include the Tax Identification Number (TIN) as an additional matching criterion.

Slide 14 of 21 - Request Letter Access Page

Request Letter Access ? Quick Help

You may submit a request to associate data related to a Demand or Defense letter you received from the Commercial Repayment Center (CRC) that is not currently available on the portal for this Account ID. To associate this data, enter the information requested on this page and click **Continue**.

Once validated, information from the requested letter, as well as information from all related letters will be available on the Demand Listing and other applicable pages for this Account ID. The Tax Identification Number (TIN) will be associated to this account and will have the same "Go Paperless" option as the account. Click **Cancel** to return to the Account Detail page without submitting your request.

Letter Information

Enter and re-enter the Letter ID from the letter you want to access: [Entry Hint](#)

*Letter ID:	<input type="text"/>
*Re-enter Letter ID:	<input type="text"/>
*Tax Identification Number	<input type="text"/>

* Select the type of letter you are using to associate information to your account and provide the required key piece of data for that letter type: [Entry Hint](#)

<input type="radio"/> Defense Letter - Enter the Case ID:	<input type="text"/>
<input type="radio"/> Demand Letter - Enter the Total Debt Due printed on the letter:	\$ <input type="text"/> . <input type="text"/>

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Slide notes

Next, select the type of letter (Defense or Demand) you want to access. Finally, include the required key piece of information for that letter type.

You can locate this information at the top of each letter in the "Regarding" section.

If you are using a Defense Letter, enter the Case ID. If the Case ID begins with a 'C', include this character when you key in the Case ID.

For a Demand Letter, enter the Total Debt Due printed on the letter. Enter the dollar amount in the Dollars field and the two-digit cents amount in the Cents field. Do not enter the dollar symbol or the decimal.

After all required information has been entered, click Continue.

Note: If at any point during the Request Letter Access process you wish to stop, click Cancel.

Once clicked, entered information will NOT be saved, the Request Letter Access process will be halted, and you will be returned to the Account Detail page.

Slide 15 of 21 - Validation

Validation

- System validates each field
 - If errors are found, the system displays a message indicating what error(s) were found
 - You must correct the error before proceeding
 - System revalidates the data once it has been entered



Slide notes

The system will validate each field for accuracy. If errors are found, the system will display applicable error messages on the screen indicating what error condition or conditions was or were found.

When errors are discovered, you must correct the error before the system allows you to proceed. Once the data has been corrected, the system will revalidate all data that has been entered.

Slide 16 of 21 - Request Letter Access Verification Page

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

Request Letter Access Verification [Quick Help](#)

The Employer and Insurer information displayed on this page is associated to the Letter ID you requested on the previous page. Please confirm that this information matches your account information and that you wish to continue requesting access to this letter and, in turn, all cases linked to this letter. Click **Continue** to proceed.

If this information does not match your account, and you do not wish to associate the Letter ID to your account, please click **Cancel** and *contact the CRC at (855) 798-2627 to report that you have received the letter in error.*

Letter ID:	86778445
Tax Identification Number (TIN):	386216995
Employer Associated to Letter ID:	IRON WORKERS' HEALTH FUND OF EAS
Insurer Associated to Letter ID:	BCBSM
Account ID:	11111111 - CIGNA
Account Type:	Insurer - Insurers and Claims Processing Third Party Administrators (TPAs)

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Slide notes

If no errors are found on the Request Letter Access page, the Request Letter Access Verification page will appear.

You must click Continue to confirm that you want to associate information from the displayed Letter ID, as well as information from all related letters to the Account ID noted.

Slide 17 of 21 - No Match

No Match

- If the Letter ID and/or key data element cannot be matched in the CRCP
 - CRCP will display message to contact the CRC
 - CRC Phone: 1-855-798-2627

**Slide notes**

If the Letter ID and/or key data element entered on the Request Letter Access page cannot be matched to a letter in the CRCP, the CRCP will display a message to contact the CRC. Contact the CRC at 1-855-798-2627 for assistance.

Slide 18 of 21 - Request Letter Access Confirmation Page

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

Request Letter Access Confirmation [Quick Help](#)

You have successfully associated information from the displayed Letter ID, as well as information from all related letters, to the Account ID shown on this page. You may view this information on the Demand Listing page.

Letter ID:	86778445
Tax Identification Number (TIN):	386216995
Account ID:	11111111 - CIGNA
Account Type:	Insurer - Insurers and Claims Processing Third Party Administrators (TPAs)

[OK](#)

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Slide notes

If the Letter ID and/or key data element entered on the Request Letter Access page are matched to a letter on the CRCP, the Request Letter Access Confirmation page will appear.

You have successfully associated information from the displayed Letter ID, as well as information from all related letters to the Account ID selected.

You may view this information on the Demand Listing page, as applicable.

Slide 19 of 21 - Course Summary

Course Summary



- Request Letter Access process
 - How to associate data related to a letter to your CRCP account
- Remove letter information from your CRCP account



Slide notes

This course explained how to use the Request Letter Access process to associate data related to a letter to your CRCP account.

This course also explained how to remove letter information that was incorrectly associated to your CRCP account.

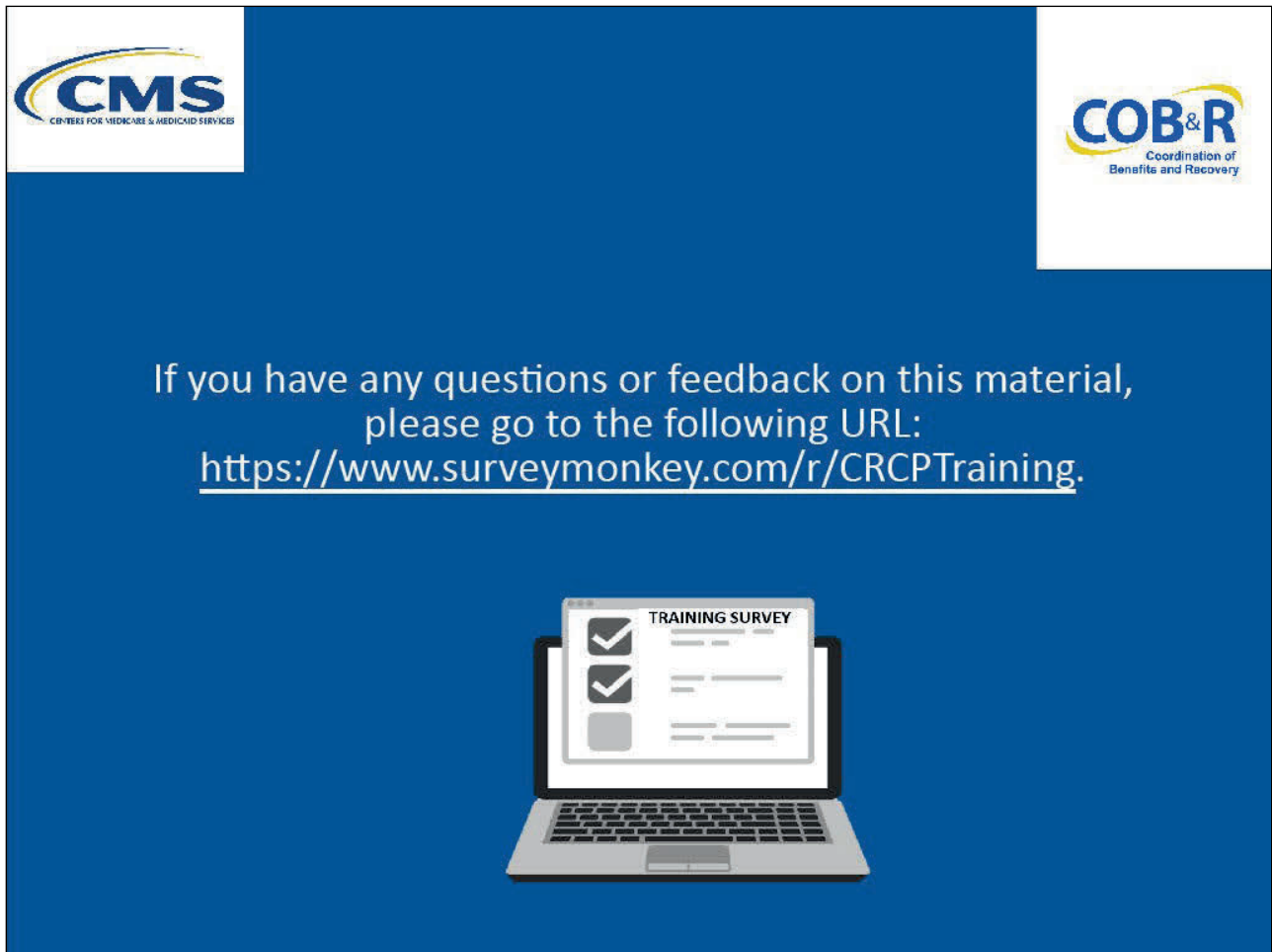
Slide 20 of 21 - Request Letter Access Conclusion

You have completed the CRCP Request Letter 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:
<https://www.cob.cms.hhs.gov/CRCP/>.

Slide notes

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

Slide 21 of 21 - 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). Centered on the slide is the text: "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).