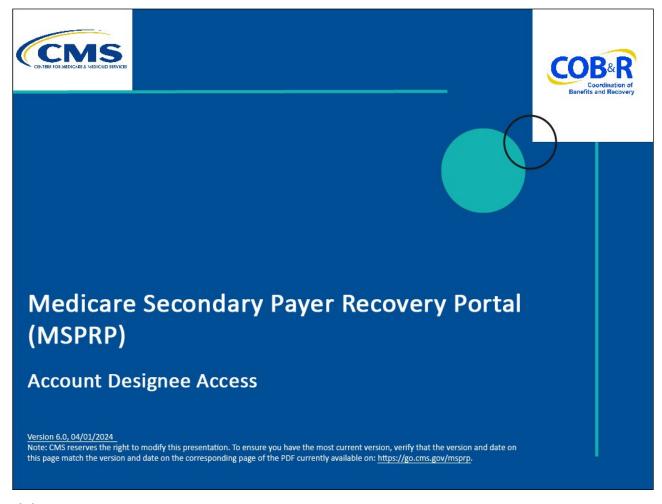
Account Designee Access

Slide 1 of 20 - Account Designee Access



Slide notes

Welcome to the Medicare Secondary Payer Recovery Portal (MSPRP) Account Designee Access course.

Slide 2 of 20 - 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 found in the MSPRP User Manual found at the following link: http://www.cob.cms.hhs.gov/MSPRP/.

Slide notes

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Slide 3 of 20 - Course Overview



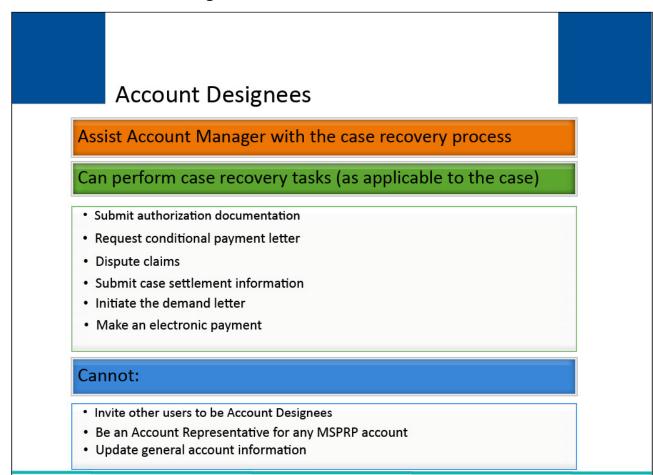


- Account Designee Registration
 - Setting up a Login and Password
 - Access privileges once registered

Slide notes

This course will discuss the basic registration process you follow to become an Account Designee (i.e., how you to set up your Login ID and Password for the first time), and the access privileges you receive once you are registered.

Slide 4 of 20 - Account Designees



Slide notes

Account Designees assist the Account Manager with the case recovery process. They may perform tasks such as:

- Submitting authorization documentation
- Requesting a conditional payment letter
- Disputing claims
- Submitting case settlement information
- Initiating the demand letter
- Make an electronic payment

Note: Only those actions that are applicable to the case will be available. However, Account Designees may not invite other users to become Account Designees, they cannot be an Account Representative for any MSPRP account, nor can they update general account information.

Slide 5 of 20 - Designee Invitation Email

Paril and Paril	
Designee Invitation	
☐ DoNotReply@cob.cms.hhs.gov	
Sent: Thu 5/10/2012 3:58 PM	
To: AAA AAA@AAA AAA	
*** PLEASE DO NOT REPLY TO THIS EMAIL ***	
Dear Name:	
You have been invited by: First Last, for Account ID: 99999, to participate in the	
Medicare Secondary Payer Recovery Portal (MSPRP) web portal process. Please follow	
this link to register: https://qua.cob.cms.hhs.gov/MSPRP/designeeRegistration?	
token=pZDiwwMBtwwMbw. If you have already registered, please visit the Medicare	
Secondary Payer Recovery Portal Welcome Page at https://qua.cob.cms.hhs.gov/MSPRP/	
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 Electronic Data Interchange (EDI) Department at (646)	
458-6740 and delete and destroy the original message and all copies.	
and desired and desired and engineering and an express.	
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Slide notes

Account Designees are selected and added to an account by the Account Manager.

Once you have been added to an account as a Designee, the MSPRP sends you an invitation email which includes instructions on your next steps. A sample email is shown on the slide.

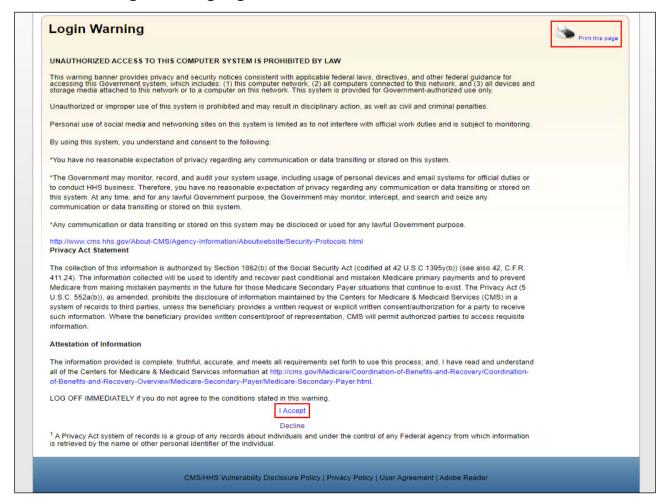
If you already have a Login ID for the Workers' Compensation Medicare Set-Aside Portal (WCMSAP), Section 111 Coordination of Benefits Secure Website (COBSW), Commercial Repayment Center Portal (CRCP), or MSPRP (as an Account Designee or Account Manager for a different account), you will not register for another MSPRP Login ID.

You will access the MSPRP using your existing Login ID and Password for these systems.

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

This link becomes inactive after 30 days of non-use, so it is important to register as soon as possible after receiving the invitation email.

Slide 6 of 10 - Login Warning Page



Slide notes

When you click on the link in the invitation email, the MSPRP Login Warning page will appear.

This page provides information about MSPRP security measures including access, penalty and privacy laws.

This page can be printed from the MSPRP 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 MSPRP.

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

Slide 7 of 20 - Designee Registration Page



Slide notes

The Designee Registration page will appear.

As an Account Designee, you register yourself on the MSPRP.

You will only go through this process once, as you only need 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 MSPRP.

Note: Account Managers can grant/add an Account Designees access to a case or revoke/remove an Account Designees access to a case and an entire account.

Additionally, to allow AMs and account designees (ADs) to easily see when an account is associated with at least one address that has opted in to the Go Paperless option, a green leaf (Go Paperless icon) will appear next to the account name on the Account List and Welcome pages. This icon will also appear next to the account ID on the Open Debt Report and Case Listing page.

Slide 8 of 20 - Designee Registration Page



Slide notes

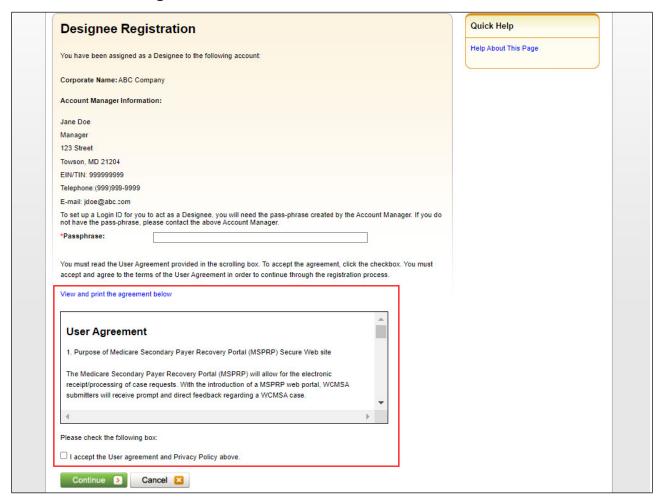
You are required to enter the Passphrase given to you by the Account Manager for this account.

The Passphrase is a short sequence of case-sensitive letters, numbers, and/or symbols, up to 30 characters long.

You must enter it exactly as the Account Manager gave it 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 20 - User Agreement



Slide notes

You must read and agree to the terms of the User Agreement at the bottom of the Designee Registration page.

You can read and/or print the User Agreement in a separate window by clicking the [View and print the agreement below] link.

Once you have read the User Agreement, and agree to abide by the terms, click the [User Agreement] checkbox. This checkbox indicates acceptance/non-acceptance of the User Agreement.

You must agree to the terms in the User Agreement in order to proceed with your registration.

Click [Continue] to proceed to the next page in the Designee Registration process.

Slide 10 of 20 - Designee Personal Information Page



Slide notes

The Designees Personal Information page will appear. All fields denoted by an asterisk (*) are required.

Enter your name and email address.

Note: This email cannot match that of the Account Manager for this account or the Account Representative for any MSPRP account.

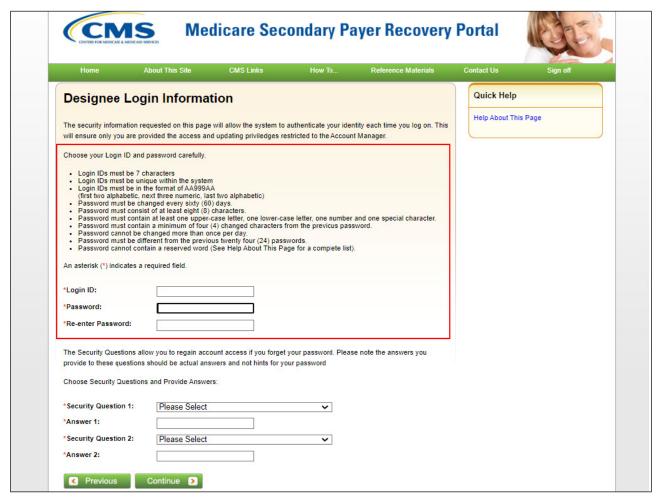
Re-enter your email address for verification purposes. This information cannot be cut and pasted.

Enter your phone number and mailing address.

For the Address Line 1 field, the street number and street name should be placed on one address line field while other information such as suite number, attention to, etc. should be placed in the Address Line 2 field, if applicable.

When the required information has been entered, click [Continue] to proceed.

Slide 11 of 20 - Designee Login Information Page



Slide notes

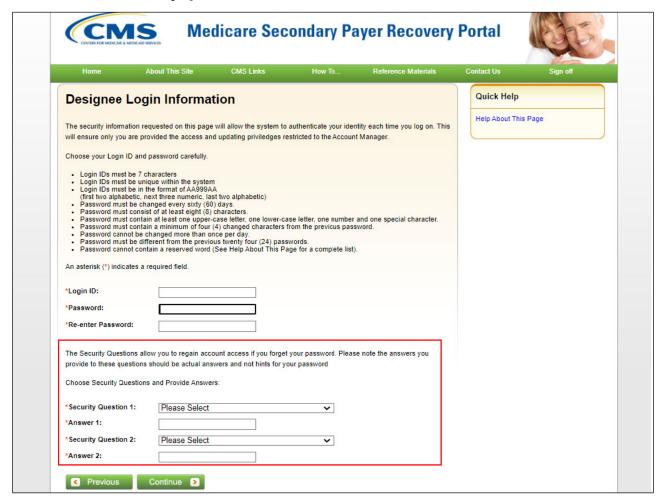
The Designee Login Information page will appear.

This page is used to create a Login ID and Password which will allow the MSPRP to authenticate your identity each time you login to the MSPRP.

You must set up a Login ID and Password that conforms to the CMS standard guidelines shown on this page.

Create and enter a Login ID and enter and re-enter a Password. You will use this Login ID and Password to access the MSPRP site.

Slide 12 of 20 - Security Questions



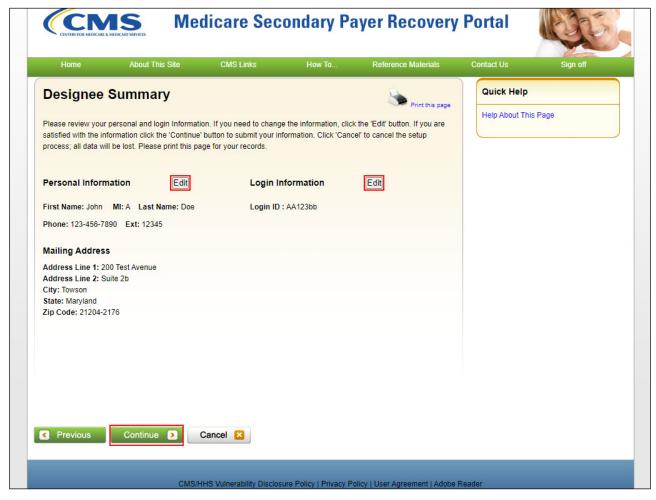
Slide notes

Choose security questions and answers that can be 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 Designee Login Information page, click [Continue].

Slide 13 of 20 - Designee Summary Page



Slide notes

The Designee Summary page will appear next.

This page displays 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, Login ID and/or Password, and address.

Review this information to ensure it is accurate.

If information needs to be corrected, click [Edit] for the corresponding section.

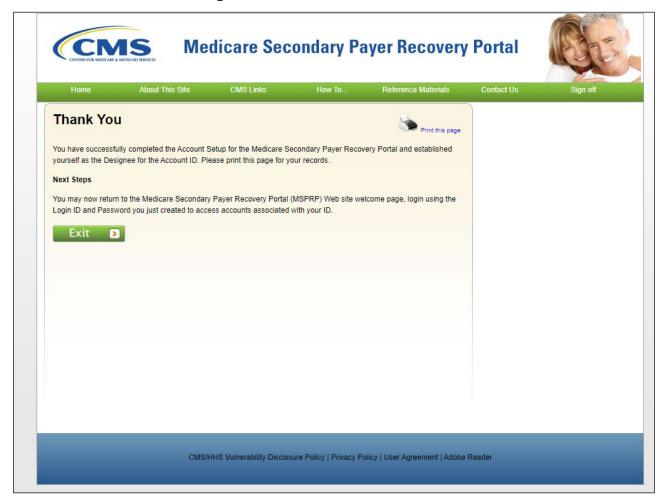
This will direct you to the applicable page to make updates.

Once you have completed making your corrections, click [Continue] on the page you are editing as well as each subsequent page until you return to the Designee Summary page.

Note: To make corrections to your address, click [Edit] for the Personal Information section.

When you have verified the information, click [Continue].

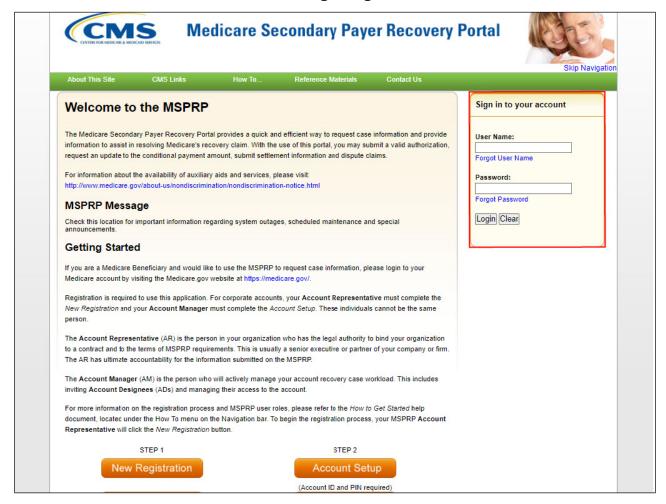
Slide 14 of 20 - Thank You Page



Slide notes

The Thank You page will appear which confirms that you have successfully completed your registration. Click [Exit] to return to the Welcome to the MSPRP Login page.

Slide 15 of 20 - Welcome to the MSPRP - Login Page



Slide notes

The Welcome to the MSPRP Login page will appear.

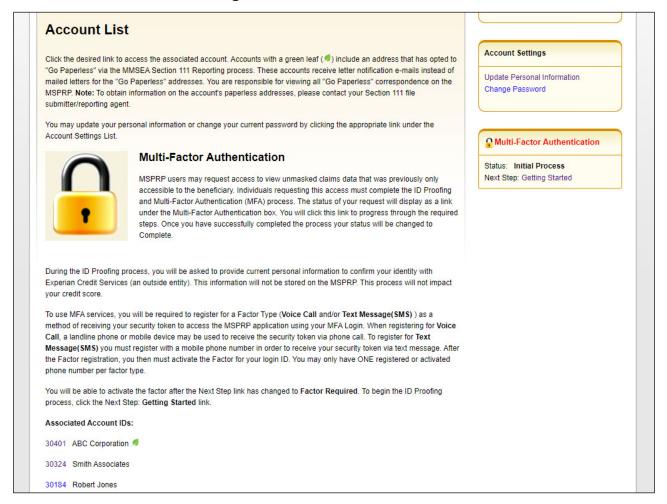
You can login to the MSPRP using the Login ID and Password you just created and begin using the MSPRP to access accounts associated with your Login ID.

Enter your Login ID in the Username field and Password in the Password field and then click [Login].

To provide increased security, additional security questions have been added to the Forgot Login ID and Forgot Password processes.

Additionally, The Welcome! page now allows AMs and ADs to view letter notification emails and letters sent to the account within the last 30 business days for Go Paperless addresses using the new Go Paperless Letter Notifications link.

Slide 16 of 20 - Account List Page



Slide notes

The Account List page will appear.

You are now logged into the MSPRP system.

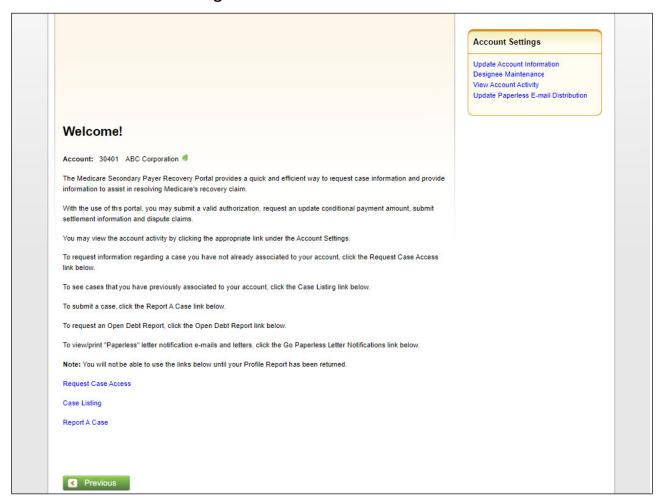
The Account List page is the Account Designee's Home page.

This page functions as the main processing page to initiate any MSPRP functions available to you as the Designee. Note: If you would like to view unmasked case information, you must complete the Multi-Factor Authentication (MFA) process. See the <u>Multi-Factor Authentication CBT</u> for more information on this process.

The Account IDs listed on this page are the accounts you are associated with.

Click the [Account ID] you want to work with.

Slide 17 of 20 - Welcome! Page



Slide notes

The Welcome! Page will appear.

The Account ID you just selected is displayed at the top of the page.

From this page, you can View Account Activity for this Account ID, or access the following functions:

- Request Case Access
- Case Listing
- Report a Case

Request Case Access is used to search for and add (link) a recovery case to your Case Listing page.

Once a case has been successfully linked (added) to the account, both you and your Account Manager will be able to view the case by accessing the Case Listing page.

You must always perform this step to link a case to your MSPRP account for the first time.

Case Listing is used to view all cases that your Account Manager has granted you access to and includes any cases that you previously requested access to using the Request Case Access page. Report a Case

displays the Case Creation page, where you may enter data related to your case and begin the case creation process.

For more information on these two functions, see the **Application Overview CBT**.

Slide 18 of 20 - Course Summary Page



Course Summary



- Account Designee registration
 - Setting up a Login and Password
 - Access privileges once registered



Slide notes

This course described the basic registration process you follow to become an Account Designee (i.e., how you to set up your Login ID and Password for the first time), and the access privileges you receive once you are registered.

Slide 19 of 20 - Conclusion





You have completed the MSPRP Account Designee Access course. Information in this course can be referenced by using the MSPRP User Manual found at the following link:

https://www.cob.cms.hhs.gov/MSPRP/.

For general information on Medicare Secondary Payer
Recovery, go to this URL:
https://go.cms.gov/cobro.

Slide notes

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Slide 20 of 20 - MSPRP Training Survey



Slide notes

If you have any questions or feedback on this material, please go to the following URL: <u>Training Survey</u>