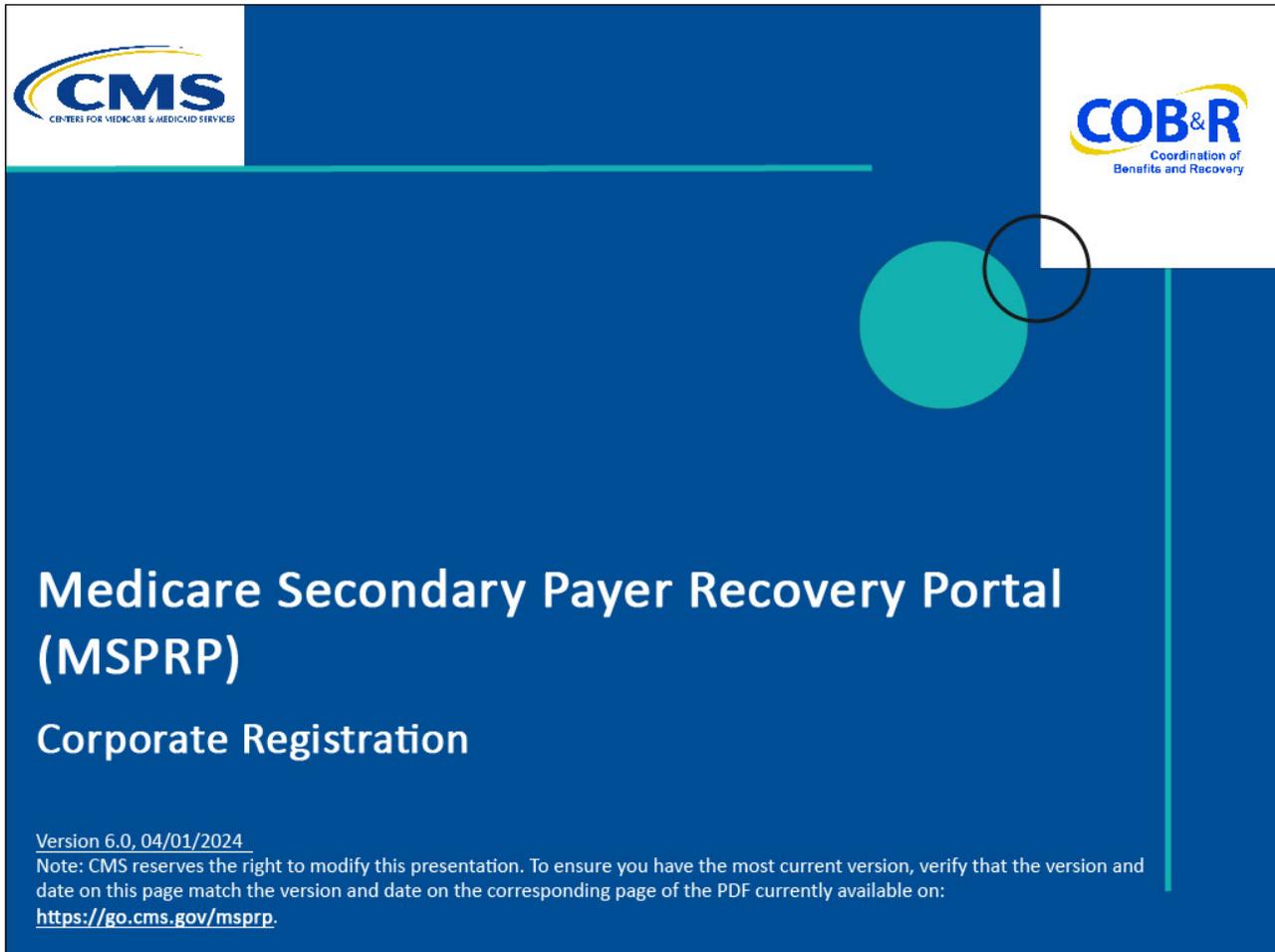


## Corporation Registration

### Slide 1 - of 24 - Corporation Registration



**CMS**  
CENTERS FOR MEDICARE & MEDICAID SERVICES

**COB&R**  
Coordination of  
Benefits and Recovery

# Medicare Secondary Payer Recovery Portal (MSRP)

## Corporate Registration

Version 6.0, 04/01/2024  
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:  
<https://go.cms.gov/msrp>.

### Slide notes

Welcome to the Medicare Secondary Payer Recovery Portal (MSRP) Corporate Registration course.

Note: This module is intended for those entities who will register for a corporate account.

A corporate account type indicates that the entity has an Employer Identification Number (EIN)/Tax Identification Number (TIN) and will be regularly submitting MSRP requests. Corporate accounts may have up to 100 Account Designees.

**Slide 2 of 24 - 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 found in the MSPRP User Manual found at the following link:  
<https://www.cob.cms.hhs.gov/MSPRP/>.

**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 found in the MSPRP User Manual found at the following link: <https://www.cob.cms.hhs.gov/MSPRP/>.

**Slide 3 of 24 - Course Overview**

## Course Overview

- Completing a New Registration
  - Next Steps



**Slide notes**

This course provides instruction on how to complete a New Registration on the MSPRP for a corporate account type and the steps that must be followed once the registration has been submitted.

**Slide 4 of 24 - Getting Started**

## Getting Started

Users must be authorized to access the MSPRP

Before users can be authorized, the registration process must be completed

- New Registration
- Account Setup

Account Representative completes New Registration

Account Manager completes Account Setup

**Slide notes**

Users must be authorized to access the MSPRP.

Before a new user can become authorized, the corporate entity must complete the registration process which involves the following steps:

- New Registration
- Account Setup

New Registration must be completed by the person named as the Account Representative.

Account Setup must be completed by the person named as the Account Manager.

The focus of this CBT is on the New Registration process.

For more information on Account Setup, please see the Corporate Account Setup CBT.

**Slide 5 of 24 - Account Representative**

## Account Representative

Legal authority to bind the company to a contract and the terms of MSPRP requirements

Note: If the person named as the Account Representative needs to be changed after the registration has been completed, the Account Manager can make the change

**Slide notes**

To begin the New Registration, the corporate entity must identify their Account Representative.

The Account Representative is the individual who has the legal authority to bind the company to a contract and the terms of MSPRP requirements and processing.

Note: If the person named as the Account Representative needs to be changed after the registration has been completed, the Account Manager can make the change.

**Slide 6 of 24 - Account Representative**

## Account Representative

<b>Preliminary Responsibilities</b>	<ul style="list-style-type: none"><li>• Must initiate the initial registration</li><li>• Designate the Account Manager</li><li>• Approve the Account Setup</li><li>• Sign Profile Report and return to Medicare - EDI Department</li></ul>
<b>Ongoing Responsibilities</b>	<ul style="list-style-type: none"><li>• Account contact</li><li>• Receive MSPRP notifications and e-mails</li></ul>



**Slide notes**

The Account Representative must initiate the New Registration on the MSPRP and provide all of the information requested by the system.

This person is responsible for designating the Account Manager.

Additionally, the Account Representative must approve the Account Setup, by physically signing the Profile Report and returning it to the Medicare - Electronic Data Interchange (EDI) Department.

The Account Representative will be the account contact and recipient of MSPRP notifications and e-mails.

**Slide 7 of 24 - Account Representative**

## Account Representative

- Cannot be user of the MSPRP
  - Cannot be the Account Manager or Account Designee
- Can register as the Account Representative for more than one MSPRP account
- Can register as the Account Representative for other MSPRP corporate accounts
- Can register as Account Manager or Account Designee for other MSPRP accounts.

**Slide notes**

The Account Representative cannot be an actual user of the MSPRP (i.e., cannot be the Account Manager or Account Designee).

Please note: Only those individuals who are assigned the role of an Account Manager or Account Designee can access and use the MSPRP.

- Can register as the Account Representative for more than one MSPRP account.

- Can register as an AR for other MSPRP corporate accounts.

- Can register as an Account Manager or Account Designee for other MSPRP accounts.

**Slide 8 of 24 - Account Manager and Designee**

## Account Manager and Account Designee

### Account Manager (only) Actions

- Complete Account Setup
- Administer the MSPRP account
- Invite other users (Account Designees)
- View Open Debt Reports



### Account Manager and Account Designee Actions (as applicable to the case)

- Submit authorization documentation
- Request conditional payment information
- Request conditional payment letter
- Dispute claims
- Submit case settlement information
- Initiate demand letter
- View/submit redetermination (First Level Appeal)
- Make an electronic payment



**Slide notes**

The Account Manager is assigned by the Account Representative. Account Managers can assign the Account Manager role to another person for Account Representative accounts.

This individual is responsible for completing Account Setup, administering the account on the MSPRP, and inviting others to assist as Account Designees and has access to view Open Debt Reports.

Both the Account Manager and the Account Designee have the ability to:

- submit authorization documentation,
- request conditional payment information,
- request a conditional payment letter,
- dispute claims,
- submit case settlement information,
- initiate the demand letter,
- view/submit redetermination, and

make an electronic payment (First Level Appeal).

## Slide 9 of 24 - Login Warning Page

## Login Warning

 [Print this page](#)

**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, as well as 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 1362(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. The Privacy Act (5 U.S.C. 552a(b)), as amended, prohibits the disclosure of information maintained by the Centers for Medicare & Medicaid Services (CMS) in a system of records to third parties, unless the beneficiary provides a written request or explicit written consent/authorization for a party to receive such information. Where the beneficiary provides written consent/proof of representation, CMS will permit authorized parties to access requisite information.

**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 <http://cms.gov/Medicare/Coordination-of-Benefits-and-Recovery/Coordination-of-Benefits-and-Recovery-Overview/Medicare-Secondary-Payer/Medicare-Secondary-Payer.html>.

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

[I Accept](#)  
[Decline](#)

<sup>1</sup> A Privacy Act system of records is a group of any records about individuals and under the control of any Federal agency from which information is retrieved by the name or other personal identifier of the individual.

## Slide notes

Once the Account Representative has been identified and they are ready to begin the New Registration, they must go to the MSPRP URL at: <https://www.cob.cms.hhs.gov/MSPRP/>.

Each time a user visits the MSPRP Website, the Login Warning page will display. 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. Users must agree to the terms of this warning each time they access the MSPRP. Click the [I Accept] link at the bottom of the page to continue.

Slide 10 of 24 - Welcome Page

**Welcome to the MSPRP**

The Medicare Secondary Payer Recovery Portal provides a quick and efficient way to request case information and provide information to assist in resolving Medicare's recovery claim. With the use of this portal, you may submit a valid authorization, request an update to the conditional payment amount, submit settlement information and dispute claims.

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

**MSPRP Message**

Check this location for important information regarding system outages, scheduled maintenance and special announcements.

**Getting Started**

If you are a Medicare Beneficiary and would like to use the MSPRP to request case information, please login to your Medicare account by visiting the Medicare.gov website at <https://medicare.gov/>.

Registration is required to use this application. For corporate accounts, your **Account Representative** must complete the *New Registration* and your **Account Manager** must complete the *Account Setup*. These individuals cannot be the same person.

The **Account 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 MSPRP 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 MSPRP.

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

For more information on the registration process and MSPRP 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 MSPRP **Account Representative** will click the *New Registration* button.

STEP 1 **New Registration**

STEP 2 **Account Setup**  
(Account ID and PIN required)

**Sign in to your account**

User Name:  
  
[Forgot User Name](#)

Password:  
  
[Forgot Password](#)

Slide notes

Once the [I Accept] link is clicked, the MSPRP Login page will display.

Click [New Registration] to continue.

**Slide 11 of 24 - Select Account Type**

**Select Account Type**

Please select the type of account for which you are registering:

Corporate

A corporate account type indicates that the entity has an Employer Identification Number (EIN) and will be regularly submitting MSPRP requests.

Representative

A representative account type indicates that the entity does not have an Employer Identification Number (EIN) but will be regularly submitting MSPRP requests.

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

**Quick Help**

[Help About This Page](#)

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

**Slide notes**

The Select Account Type page displays.

Select the Corporate radio button and then click [Continue].

If at any point during the registration process the user wishes to stop, they should click [Cancel].

Once clicked, information entered on the current page and any previous pages will NOT be saved and the user will be returned to the MSPRP Login page.

**Slide 12 of 24 - Corporate Information Page**

CENTERS FOR MEDICARE & MEDICAID SERVICES

Home About This Site CMS Links How To... Reference Materials Contact Us Sign off

## Corporate Information

An asterisk (\*) indicates a required field.

\*Employer Identification Number (EIN):

\*Corporation Name:

### Business Mailing Address

\*Address Line 1:

Address Line 2:

\*City:

\*State:

\*Zip Code:  -

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

Quick Help  
[Help About This Page](#)

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

**Slide notes**

Once the Corporate account type is selected, the Corporate Information page will display.

Information for the company that will be submitting MSPRP requests must be entered on this page.

All fields denoted with a red asterisk are required.

The EIN must be unique in the MSPRP. The same EIN cannot be registered for more than one account.

Enter the EIN associated with the corporate account for this MSPRP registration.

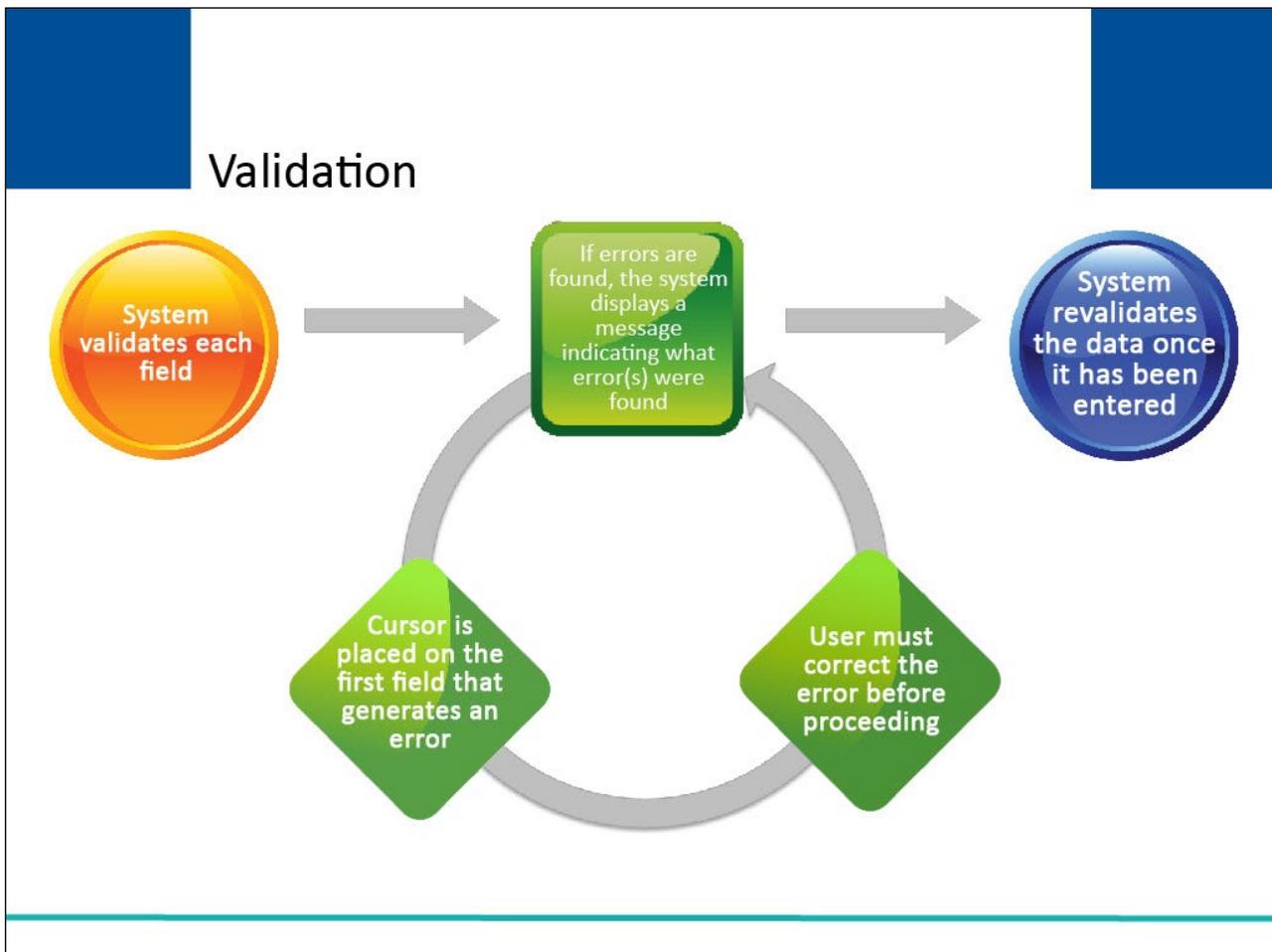
If the corporate account has more than one EIN, submit this registration with any one of the EINs.

Enter the corporation's name and corporation's mailing address in the business mailing address fields.

The address submitted on this page will be used to send the post-registration letter that includes the Account ID and Personal Identification Number (PIN).

Once all required information has been entered, the user must click [Continue].

## Slide 13 of 24 - Validation

**Slide notes**

The system will validate each field on each registration page for accuracy and completeness.

If errors are found, the system will display applicable error messages on the screen indicating what error condition(s) were found.

When errors are discovered, the cursor will be placed on the first field that generates an error condition.

This will either be a required field that is missing data or a field that contains a data error.

The user must correct the error before the system will allow the user to proceed to the next page.

Once the data has been corrected, the system will revalidate all data that has been entered.

**Slide 14 of 24 - Account Representative Information**

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## Account Representative (AR) Information

**Warning - The person named on this page will not be able to access the MSPRP application and cannot be a user of this system. This should be the individual in the organization who has the legal authority to bind the organization to a contract and the terms of MSPRP requirements. Click the [Help About This Page](#) link for additional information on the MSPRP Account Representative responsibilities and abilities.**

An asterisk (\*) indicates a required field.

\*AR First Name:  MI:  \*Last Name:

\*AR Title:

\*E-mail Address:

\*Re-enter E-mail Address:

\*Phone:  -  -  - ext.:

Fax:  -  -

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

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

**Slide notes**

After successfully completing the Corporate Information page, the Account Representative (AR) Information page will display.

Information related to the Account Representative must be entered on this page.

This information will be used to send important information regarding the account, including the Profile Report.

All fields denoted with a red asterisk are required.

It is critical that the correct contact information for the Account Representative is entered on this page, including their correct email address.

If the email address of the Account Manager or Account Designee is entered instead of the email address of the Account Representative, those individuals will be unable to register as users of the MSPRP.

Note: The Account Representative can only have that one role.

This person cannot be an Account Manager or an Account Designee.

The MSPRP will verify that the submitted email address for each user role on the account is different. If there are any email address matches between the Account Manager, Account Designee or Account Representative on the account, an error will display.

After entering the Account Representative information, click [Continue] to proceed.

Slide 15 of 24 - Registration Summary

Slide notes

The Registration Summary page will display.

Users can print this page by clicking the [Print this page] link.

This page lists all the information that was previously entered and provides users with the opportunity to make changes.

All information should be reviewed and verified before continuing.

Changes can be made to Account Type, Corporate Information or Account Representative Information.

To make any corrections, click the [Edit] button next to the applicable section.

The system will display that information entry page.

Slide 16 of 24 - Corporate Information

The screenshot shows a web form titled "Corporate Information" on the CMS website. The header includes navigation links: Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Sign off. The form contains the following fields:

- Employer Identification Number (EIN):** A text input field with a mask icon.
- Corporation Name:** A text input field with a mask icon.
- Business Mailing Address:**
  - Address Line 1:** A text input field.
  - Address Line 2:** A text input field.
  - City:** A text input field.
  - State:** A dropdown menu with "Please Select" as the current selection.
  - Zip Code:** A text input field with a mask icon.

At the bottom of the form are three buttons: "Previous" (with a left arrow), "Continue" (with a right arrow), and "Cancel" (with an 'x' icon). A "Quick Help" sidebar on the right contains a link for "Help About This Page". The footer of the page includes links for "CMS/HHS Vulnerability Disclosure Policy", "Privacy Policy", "User Agreement", and "Adobe Reader".

Slide notes

Add, change, or delete any of the information.

Once all corrections have been made, the user must click [Continue] until they have navigated back to the Registration Summary page.

Slide 17 of 24 - Registration Summary

Slide notes

When the Registration information has been verified, click [Continue] to submit the registration.

Slide 18 of 24 - Thank You



Slide notes

The MSPRP Registration Completed Successfully. Thank You page displays confirming that the initial registration has been successfully completed.

The assigned Account ID is displayed on the Thank You page.

It is recommended that you print this page for your records.

The Account ID will be needed by the Account Manager for Step 2: Account Setup.

Click the Medicare Secondary Payer Portal Welcome Page link to return to the Welcome to the MSPRP page.

**Slide 19 of 24 - Next Steps- New Registration**

## Next Steps

### EDI Department

- Validates registration information
- Email sent to Account Representative within two weeks, which contains
  - PIN
  - Instructions for Account Setup



### Contact an EDI Representative if letter is not received within 10 business days

- Phone: (646) 458-6740
- E-mail: [COBVA@bcrcgdit.com](mailto:COBVA@bcrcgdit.com)

**Slide notes**

The information submitted in the New Registration step will be vetted by the EDI Department to ensure it is valid and complete.

Within two weeks, an email will be mailed to the Account Representative.

This email will be sent to the Account Representative email address that was submitted on the Account Representative Information page during the New Registration.

It will include the PIN and instructions for the next step in the registration process - Account Setup.

If this email is not received within 10 business days, contact an EDI Representative by phone at (646) 458-6740 or email at [COBVA@bcrcgdit.com](mailto:COBVA@bcrcgdit.com).

**Slide 20 of 24 - Next Steps Information**

## Next Steps

### Account Representative

- Must give the Account ID and PIN to the Account Manager



### Account Manager

- Must complete the Account Setup on the MSPRP
  - Account ID and PIN are needed to begin
  - Please see the Corporate Account Setup CBT for more information



**Slide notes**

The Account Representative must give the Account ID and PIN to the Account Manager for the Corporate account to use to complete the Account Setup.

The Account Manager must return to the MSPRP to complete the Account Setup.

The Account Manager will need to enter the Account ID and PIN on the main page to begin setup.

For more information on the Account Setup process, please see the Corporate Account Setup CBT.

**Slide 21 of 24 - Profile Report**

Medicare Secondary Payer Recovery Portal Profile Report	
Account ID: 31304	Date: Month Date Year
EDI Contact Information: Email: AAAA@AAA.AAA	Phone: ###-###-####
<div style="border: 1px solid orange; padding: 10px; text-align: center; font-weight: bold; font-size: 1.2em;">                     Within 10 business days of Account Setup completion, a Profile Report is emailed to the Account Representative                 </div>	
<b>Representative:</b> Name: AAAA Address: AAAA Email: AAA@VV.VVV	
<b>Account Manager:</b> Name: AAAA Address: AAAA Email: AAAA@AAA.AAA	
Account ID: 31304	Date: Month Date Year
EDI Contact Information: Email: AAAA@AAA.AAA	Phone: ###-###-####
<b>SAFEGUARDING &amp; LIMITING ACCESS TO DATA</b> I, the undersigned Account Manager for the MSPRP representative account defined above, certify that the information contained in this Registration is true, accurate and complete to the best of my knowledge and belief, and I authorize CMS to verify this information. I agree to establish and implement proper safeguards against unauthorized use and disclosure of the data for the purposes of MSPRP proposal(s) review and processing. Proper safeguards shall include the adoption of policies and procedures to ensure that the data obtained shall be used solely in accordance with Section 1105 of the Social Security Act [42 U.S.C. ? 1305], Section 1874(b) of the Social Security Act (42 U.S.C. ? 1395k(b)), Section 1862(b) of the Social Security Act (42 U.S.C. ? 1395y(b)), and the Privacy Act of 1974, as amended [5 U.S.C. ? 552a]. Users shall establish appropriate administrative, technical, procedural, and physical safeguards to protect the confidentiality of the data and to prevent unauthorized access to the data provided by the CMS. You agree that the authorized representatives of the CMS shall be granted access to premises where the Medicare data are kept for the purpose of inspecting security arrangements and confirming whether the user is in compliance with the security requirements specified above. Access to any information exchanged during the MSP Recovery process shall be restricted to CMS, COBEC, and MSPRP personnel, and other authorized users who require access to (1) perform their official duties in accordance with the approved uses of the information; (2) respond to authorized law enforcement investigations; or (3) respond to any required legal process. Such personnel shall be advised of (1) the confidential nature of the information; (2) safeguards required to protect the information; and (3) the administrative, civil and criminal penalties for non-compliance contained in applicable Federal laws.	
Signature of Account Manager: _____ Date: _____	

**Slide notes**

Once the Account Manager has completed the account setup, an email notification will be sent to the Account Representative.

The Account Manager will be copied on this email.

This notification will include a Profile Report that contains information regarding your company and the associated contact information as well as a Data Use Agreement.

It may take up to 10 business days to receive the Profile Report.

**Slide 22 of 24 - Next Steps**

## Next Steps

### Account Representative

- Must review the Profile Report for accuracy
  - Contact an EDI Representative to request modifications
    - Phone: (646) 458-6740
    - Email: [COBVA@GHIMedicare.com](mailto:COBVA@GHIMedicare.com)
  - Return Profile Report via email within 60 business days
    - Put 'MSRP Profile Report' in the subject line



If signed Profile Report is not received within 60 business days, the account will automatically be deleted

- Registration process must be started from the beginning

**Slide notes**

The Account Representative must review the Profile Report for accuracy.

If information on the Profile Report is inaccurate or requires modifications, please contact an EDI Representative by phone at (646) 458-6740 or email at [COBVA@GHIMedicare.com](mailto:COBVA@GHIMedicare.com).

The Account Representative will have 60 business days to review, sign and return the Profile Report to the Medicare - EDI Department.

When returning the signed Profile Report via e-mail, put 'MSRP Profile Report' in the subject line.

If a signed Profile Report is not received within that timeframe, the account will be automatically deleted on the 60th business day.

If the account is deleted, the registration process must be started from the beginning.

**Slide 23 of 24 - References**

You have completed the MSPRP Corporate Registration 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**

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

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For general information on Medicare Secondary Payer Recovery, go to this URL:

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

**Slide 24 of 24 - 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). The central text reads: "If you have any questions or feedback on this material, please go to the following URL: <http://www.surveymonkey.com/s/MSPRPTraining>." Below the text is an icon of a computer monitor displaying a survey interface with the word "SURVEY" at the top, a list of items on the left, and a hand cursor pointing to a question.

**Slide notes**

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