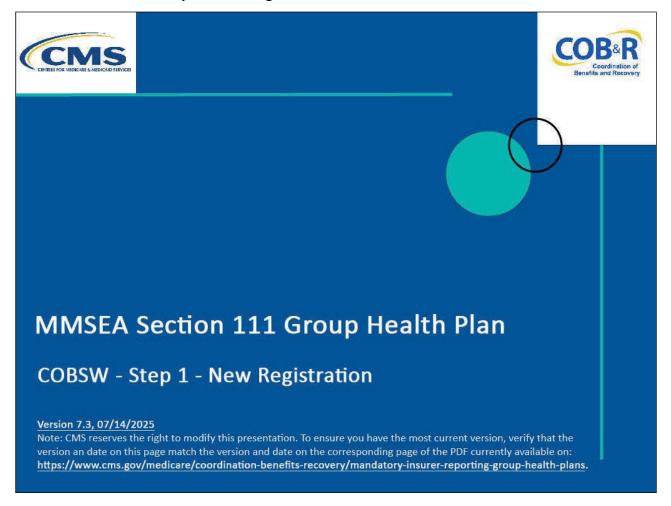
COBSW Step 1 - New Registration Introduction

Slide 1 of 37 - COBSW Step 1 - New Registration Introduction



Slide notes

Welcome to the Section 111 Coordination of Benefits (COB) Secure Website Step 1- New Registration course for Group Health Plan (GHP) reporters.

Slide 2 of 37 - 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 and Medicaid Services (CMS) instructions for the MMSEA Section 111 implementation. All affected entities are responsible for following the instructions found at the following link:

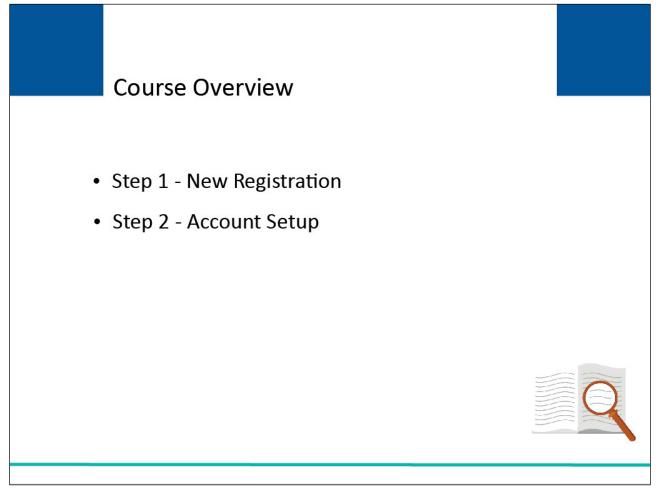
https://www.cms.gov/medicare/coordination-benefits-recovery/mandatory-insurer-reporting-group-health-plans.

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 and Medicaid Services (CMS) instructions for the MMSEA Section 111 implementation.

All affected entities are responsible for following the instructions found at the following link: <u>CMS GHP</u> Website.

Slide 3 of 37 - Course Overview



Slide notes

Topics in the Section 111 COBSW curriculum include Step 1, New Registration, and Step 2, Account Setup.

This course will cover Step 1- New Registration. Before starting Step 1, you should review the <u>Section 111 GHP Registration Course</u> which precedes this course.

The Registration course describes the process that must be completed for Section 111 registration. This process can also be found in the GHP User Guide.

Slide 4 of 37 - Introduction to Section 111 COBSW

Introduction to Section 111 COBSW

- Interface for RREs
 - Register
 - Submit files
 - Review status of file submissions
 - Attain response files
 - Review statistics

Slide notes

The Section 111 COBSW provides an interface for Responsible Reporting Entities (RREs) impacted by the Medicare Secondary Payer (MSP) reporting mandated by Section 111 of the Medicare, Medicaid, and SCHIP Extension Act of 2007 (MMSEA). The Section 111 COBSW will be used to register RREs with the Centers for Medicare & Medicaid Services (CMS).

Additionally, the site provides RREs and their agents with the ability to submit files, review the status of current file submissions, attain generated response files, and review statistical information related to file submissions.

The following steps will guide you through the process of getting started on the Section 111 COBSW.

Slide 5 of 37 - Section 111 Mandatory Reporting Website Usage Warning



Section 111 Mandatory Reporting Website Usage Warning

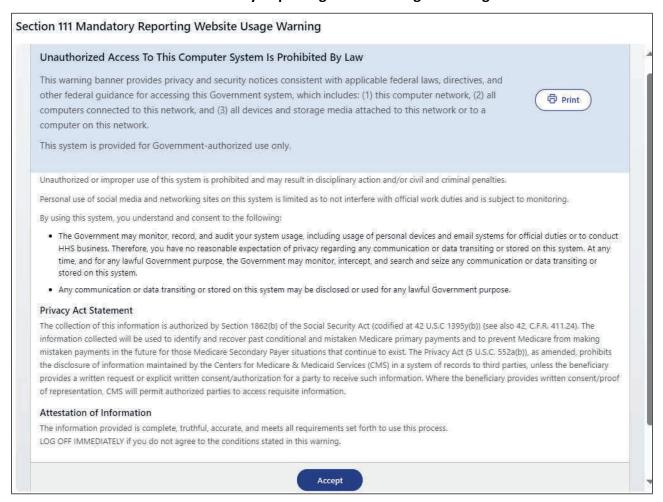


- Information about Section 111 COBSW security measures
 - Access
 - Penalties
 - Privacy laws

Slide notes

When you first enter the Section 111 COBSW, the Section 111 Mandatory Reporting Usage Warning will appear. This page provides information about Section 111 COBSW security measures including access, penalty, and privacy laws. If you accept the terms of the Login Warning, you will be taken to the Section 111 COBSW Home page.

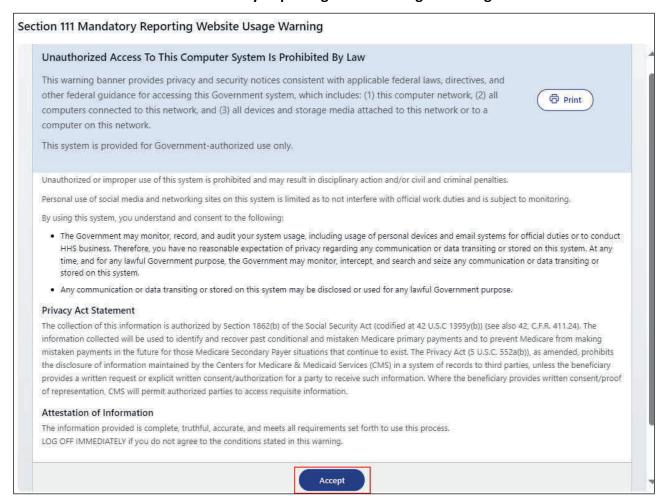
Slide 6 of 37 - Section 111 Mandatory Reporting Website Usage Warning



Slide notes

The Section 111 Mandatory Reporting Website Usage Warning page will appear.

Slide 7 of 37 - Section 111 Mandatory Reporting Website Usage Warning



Slide notes

If you accept the terms, select the I Accept link to continue.

Slide 8 of 37 - Menu Options

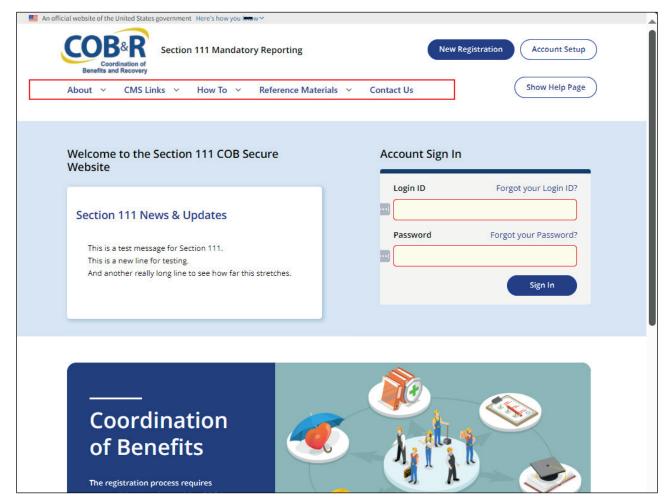


Slide notes

Upon entering the Section 111 COBSW website, you will see the following Menu Options:

- About this site,
- CMS links,
- How to...,
- Reference Materials, and
- Contact Us.

Slide 9 of 37 - Welcome to the Section 111 COB Secure Website



Slide notes

From the Welcome/Home page, click on any of the menu options for more information.

Slide 10 of 37 - Registration on the Section 111 COBSW

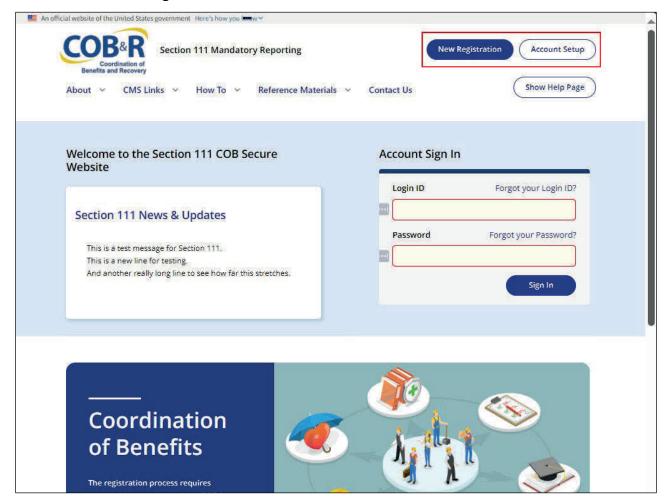
Registration on the Section 111 COBSW • Step 1 - New Registration • Step 2 - Account Setup

Slide notes

Before you begin registration on the Section 111 COBSW, make sure you review the <u>Section 111 GHP</u> <u>Registration Course</u> that precedes this course. The Registration course describes the Section 111 registration process. You will need to define user roles (Authorized Representative, Account Manager, Account Designees) and determine how many RRE IDs you will need for this RRE registration before beginning registration on the Section 111 COBSW.

In order to begin using the COBSW for MMSEA Section 111, a company representative for the RRE must first click on the "New Registration" button, and then complete and submit the registration for the RRE. Complete (Step 1) New Registration the first time you access the Section 111 COBSW to register your company. Move on to (Step 2) Account Setup if you have gone through the initial registration process and have received an email containing your Responsible Reporting Entity Identification Number (RRE ID) and Personal Identification Number (PIN) from the BCRC. You will need the RRE ID and PIN to continue with the Account Setup process. Once the registration process is completed, your Account Manager will be able to complete the account setup process.

Slide 11 of 37- New Registration Link



Slide notes

Click on the New Registration button to register your company. Click on the Account Setup (GHP) button if you have gone through the initial registration process and need to complete your account setup.

Note: Additional New Registration and Account Setup links also appear at the bottom of this page.

Slide 12 of 37 - New Registration



New Registration

- Captures
 - Basic RRE information
 - Authorized Representative contact information
- · Completed for each RRE ID
 - Unique code assigned by the BCRC
 - Used for file submission (file submitters)
 - Used for submitting claim information on the Section 111
 COBSW (DDE submitters)

Slide notes

During the new registration process, basic information related to the RRE will be captured. Authorized Representative contact information (name, job title, address, email address, phone number) is also required.

The new registration step must be completed by the RRE for each RRE ID it would like to use for reporting.

The RRE will receive an RRE ID after completing the New Registration step. The RRE ID is the unique code assigned by the BCRC to be used by file submitters when submitting files and DDE submitters when submitting claim information on the Section 111 COBSW.

Slide 13 of 37 - Account Registration

Account Registration You will now go through Step 1 of the Section 111 COB Secure Web site (COBSW) registration process to create a new Responsible Reporting Entity identification number (RRE ID) for reporting Authorized Representative (AR) Role purposes. Your Authorized Representative is the individual in the RRE Basic information related to the RRE will be captured including: organization who has the legal authority to bind the · A Federal Tax Identification Number (TIN) for the RRE organization to a contract and the terms of Section 111 Company name and address requirements and processing. Your AR has ultimate accountability for the RRE's compliance with Section 111 · Company Authorized Representative contact information (name, job title, address, E-mail reporting requirements. address, phone, fax) National Association of Insurance Commissioners (NAIC) company code, if applicable The Authorized Representative: Reporter Type (GHP or Liability/No-Fault/Workers' Compensation) . May perform this New Registration step on the COBSW, but Subsidiary company information applicable to the file submission for the RRE ID (company) will not be provided with a Login ID names, TINs, NAIC company codes for the subsidiaries). · Cannot be an agent of the RRE · Will designate the Account Manager Before continuing, be sure to have this information, including the E-mail address for your Authorized Representative on hand. · Must approve the account set up, by physically signing the profile report including the Data Use Agreement, and returning it to the BCRC · Will be the recipient of BCRC notifications related to noncompliance with Section 111 reporting requirements. If you need more than one RRE ID for Section 111 reporting, this step must be repeated for each. The information you provide will be verified by the BCRC. The RRE ID will be provided at completion of registration and the PIN will be emailed to the contact for the account after vetting is complete. Upon receipt of the email, your Account Manager (AM) will return to complete Step 2 of the process, Account Refer to the How to Get Started document under the How To menu option for more information.

Slide notes

This page describes Step 1 of the Section 111 registration process, New Registration.

Continue

Cancel

Slide 14 of 37 - Account Registration

You will now go through Step 1 of the Section 111 COB Secure Web site (COBSW) registration process to create a new Responsible Reporting Entity identification number (RRE ID) for reporting purposes. Basic information related to the RRE will be captured including:

- A Federal Tax Identification Number (TIN) for the RRE
- Company name and address

Account Registration

- Company Authorized Representative contact information (name, job title, address, E-mail address, phone, fax)
- National Association of Insurance Commissioners (NAIC) company code, if applicable
- Reporter Type (GHP or Liability/No-Fault/Workers' Compensation)
- Subsidiary company information applicable to the file submission for the RRE ID (company names, TINs, NAIC company codes for the subsidiaries).

Before continuing, be sure to have this information, including the E-mail address for your Authorized Representative on hand.

Authorized Representative (AR) Role

Your Authorized Representative is the individual in the RRE organization who has the legal authority to bind the organization to a contract and the terms of Section 111 requirements and processing. Your AR has ultimate accountability for the RRE's compliance with Section 111 reporting requirements.

The Authorized Representative:

- May perform this New Registration step on the COBSW, but will not be provided with a Login ID
- · Cannot be an agent of the RRE
- · Will designate the Account Manager
- Must approve the account set up, by physically signing the profile report including the Data Use Agreement, and returning it to the BCRC
- Will be the recipient of BCRC notifications related to noncompliance with Section 111 reporting requirements.

If you need more than one RRE ID for Section 111 reporting, this step must be repeated for each.

The information you provide will be verified by the BCRC. The RRE ID will be provided at completion of registration and the PIN will be emailed to the contact for the account after vetting is complete. Upon receipt of the email, your Account Manager (AM) will return to complete Step 2 of the process, Account Setup.

Refer to the How to Get Started document under the How To menu option for more information.



Cancel

Slide notes

Click the Continue button to proceed to the next page in the New Registration step.

Slide 15 of 37 - Account Registration

Account Registration

You will now go through Step 1 of the Section 111 COB Secure Web site (COBSW) registration process to create a new Responsible Reporting Entity identification number (RRE ID) for reporting purposes.

Basic information related to the RRE will be captured including:

- · A Federal Tax Identification Number (TIN) for the RRE
- Company name and address
- Company Authorized Representative contact information (name, job title, address, E-mail address, phone, fax)
- National Association of Insurance Commissioners (NAIC) company code, if applicable
- Reporter Type (GHP or Liability/No-Fault/Workers' Compensation)
- Subsidiary company information applicable to the file submission for the RRE ID (company names, TINs, NAIC company codes for the subsidiaries).

Before continuing, be sure to have this information, including the E-mail address for your Authorized Representative on hand.

Authorized Representative (AR) Role

Your Authorized Representative is the individual in the RRE organization who has the legal authority to bind the organization to a contract and the terms of Section 111 requirements and processing. Your AR has ultimate accountability for the RRE's compliance with Section 111 reporting requirements.

The Authorized Representative:

- May perform this New Registration step on the COBSW, but will not be provided with a Login ID
- · Cannot be an agent of the RRE
- · Will designate the Account Manager
- Must approve the account set up, by physically signing the profile report including the Data Use Agreement, and returning it to the BCRC
- Will be the recipient of BCRC notifications related to noncompliance with Section 111 reporting requirements.

If you need more than one RRE ID for Section 111 reporting, this step must be repeated for each.

The information you provide will be verified by the BCRC. The RRE ID will be provided at completion of registration and the PIN will be emailed to the contact for the account after vetting is complete. Upon receipt of the email, your Account Manager (AM) will return to complete Step 2 of the process, Account Setup.

Refer to the How to Get Started document under the How To menu option for more information.

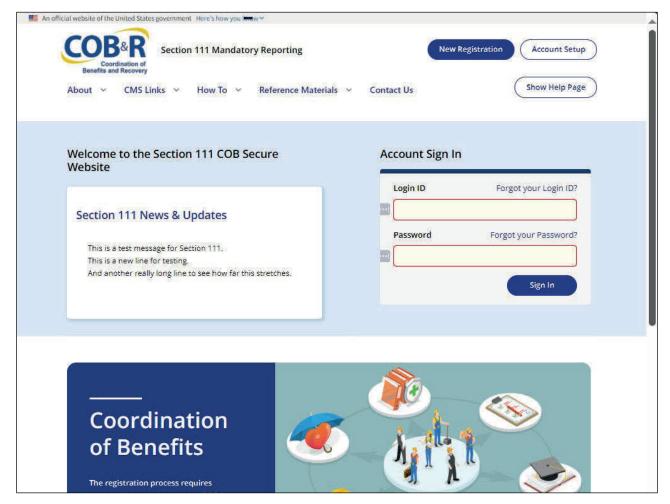
Continue

Cancel

Slide notes

Click the Cancel button to terminate the action.

Slide 16 of 37 - Welcome to the Section 111 COB Secure Website



Slide notes

Any time you click the Cancel button, you will be returned to the previous page and any information you entered will not be saved.

Slide 17 of 37- RRE Information



- TIN/EIN
- · Company name and address
- NAIC company code
- Company telephone number
- Reporter type (GHP)
- Subsidiary companies

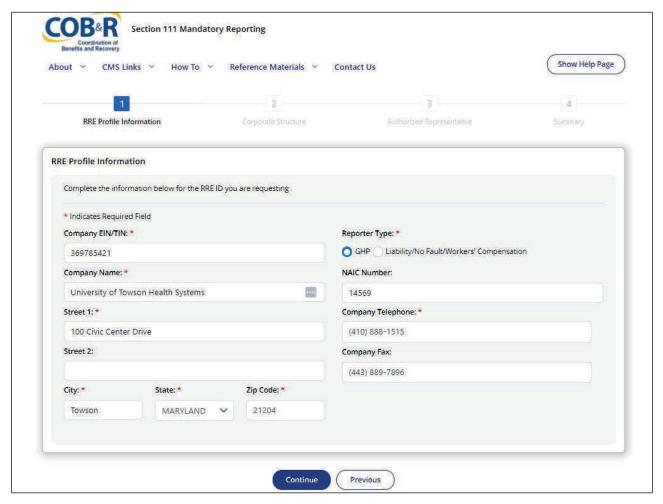
Slide notes

Your RRE company representative will be asked to submit the following information:

- A Federal Tax Identification Number (TIN) or Employer Identification Number (EIN) for the RRE;
- Company name and address;
- National Association of Insurance Commissioners (NAIC) company code, if applicable;
- Company telephone number;
- Reporter Type (as a Group Health Plan (GHP) reporter, select Group Health Plan); and
- Optional Subsidiary company information to be included in the file submission for the registration (names, TINs, NAIC company codes for the subsidiaries).

Once your registration is submitted, this information will be validated by the BCRC.

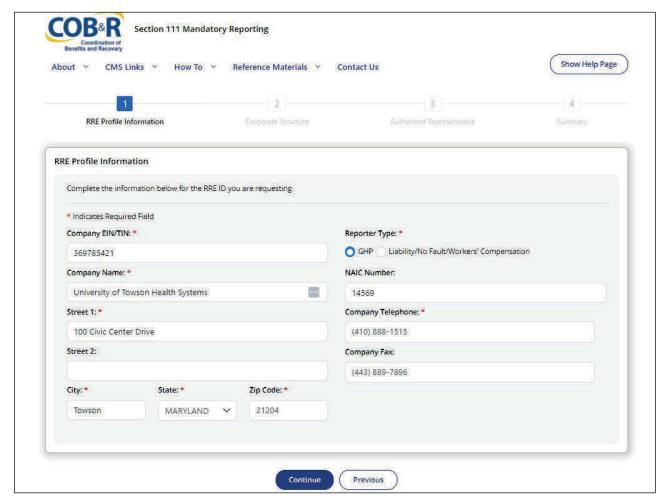
Slide 18 of 37- RRE Profile Information



Slide notes

This information will be entered on the RRE Information page for the Responsible Reporting Entity you are registering for this RRE ID.

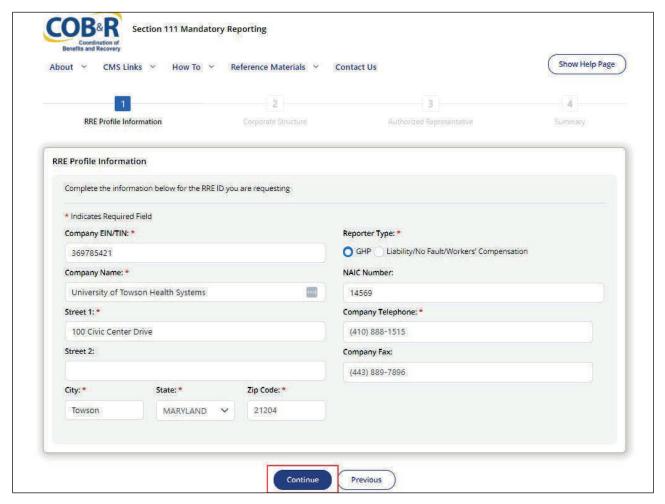
Slide 19 of 37- RRE Profile Information



Slide notes

- Company EIN/TIN: The EIN or TIN assigned to the Company.
- Company Name: The company name associated with the Section 111 registration.
- Company Address: The corporate address associated with the TIN or EIN supplied.
- NAIC Number: The company code assigned to your company by the National Association of Insurance Commissioners (NAIC). If you are not registered with the NAIC, then you do not need to complete this field.
 - If you have more than one NAIC Company Code, you may submit this registration with any one of those codes.
- Company Telephone: Telephone number of your corporate office.
- Company Fax: Facsimile number of your corporate office.
- Reporter Type: Type of RRE. As a Group Health Plan (GHP) reporter, select GHP by clicking the appropriate radio button.

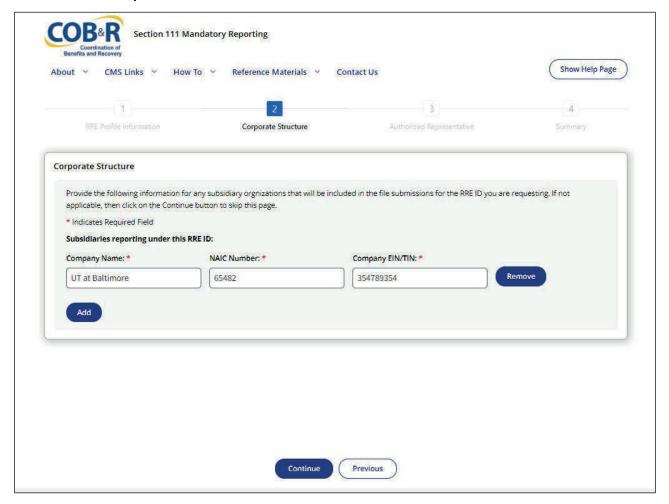
Slide 20 of 37- RRE Profile Information



Slide notes

Click the Continue button to proceed.

Slide 21 of 37- Corporate Structure



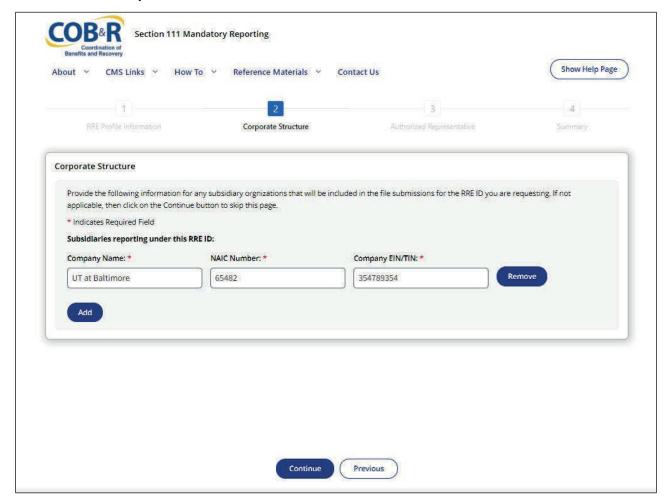
Slide notes

The Corporate Structure page allows you to submit information for any subsidiaries for which you will be reporting under this RRE registration. Enter the company names, company NAIC numbers (if applicable), and EINs/TINs.

Note: Information for subsidiaries is optional. CMS encourages you to supply this information. Doing so will assist us in our efforts to help assure that you follow the Section 111 reporting requirements.

Further, we may require this information later during subsequent recovery efforts.

Slide 22 of 37 - Corporate Structure



Slide notes

All TINs supplied for subsidiaries under one RRE ID must be unique. In other words, all TINs for the RRE ID and subsidiaries listed in the New Registration step must be different within one specific RRE ID.

If your subsidiaries do not have different TINs, then do not list them on the corporate structure page of the New Registration step on the COBSW.

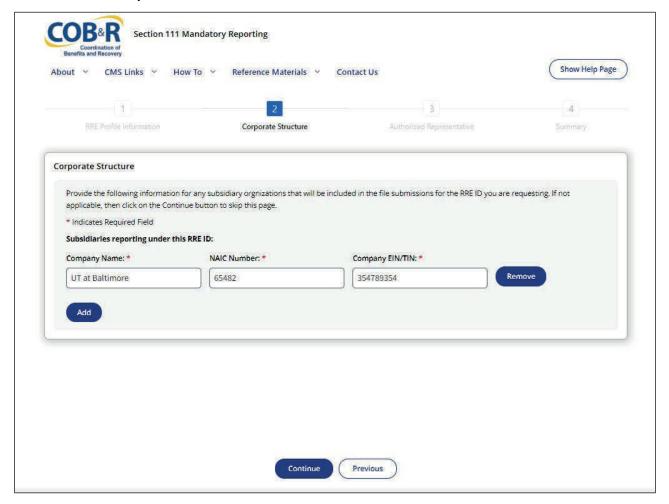
You can use the same TIN for multiple, different RRE IDs. TINs just need to be unique within the same RRE ID.

For example, if you are one entity with one TIN registering five different RRE IDs, you can use the same TIN for all five distinct RRE IDs.

The subsidiary information on the corporate structure page is not required. If you have trouble with data entry on this page, you may simply click on the Continue button to bypass it.

If you do not have any subsidiary information to provide, you can click on Continue to skip this page.

Slide 23 of 37 - Corporate Structure



Slide notes

- Subsidiary Company Names: Supply the names of all the subsidiary companies reflected in this registration for which data will be submitted.
- Company NAIC Number(s): Company code(s) assigned to each subsidiary organization by the NAIC. If the subsidiary is not registered with the NAIC, you do not need to complete this field.
- EIN(s)/TIN(s): Supply the corresponding EIN/TIN for each subsidiary company listed.

If you will be reporting for more subsidiaries than those allotted on the page, click the Add button to create additional subsidiary fields.

Click the Continue button to proceed.

Slide 24 of 37 - Authorized Representative



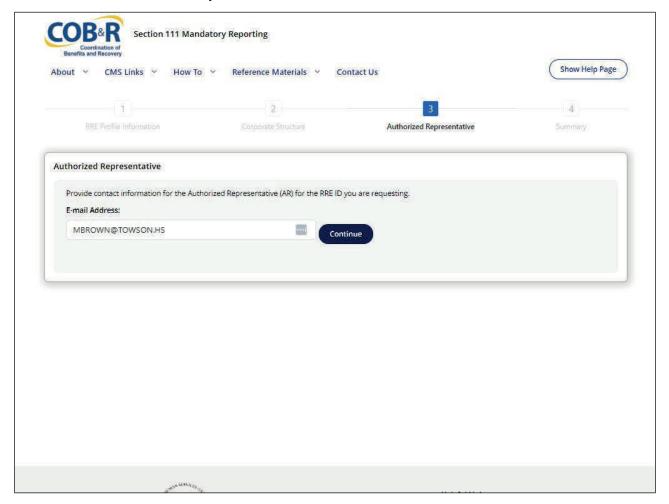
- Individual who has legal authority to bind organization to terms of MMSEA Section 111
- Accountable for compliance
- Cannot be
 - Account Manager
 - Account Designee
- Will not receive Section 111 COBSW user ID

Slide notes

Each RRE must assign or name an Authorized Representative. This is the individual in the RRE organization who has the legal authority to bind the organization to a contract and the terms of MMSEA Section 111 requirements and processing.

The Authorized Representative has ultimate accountability for the RRE's compliance with Section 111 reporting requirements. The Authorized Representative cannot be the Account Manager or Account Designee for the RRE ID. The Authorized Representative will not receive a Section 111 COBSW user ID.

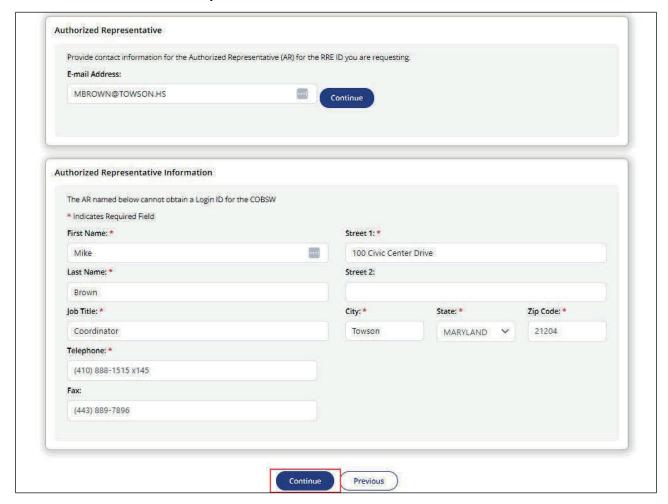
Slide 25 of 37 - Authorized Representative



Slide notes

The Authorized Representative page will appear. Enter the email address for the Authorized Representative for the select RRE ID and click Continue.

Slide 26 of 37 - Authorized Representative Information



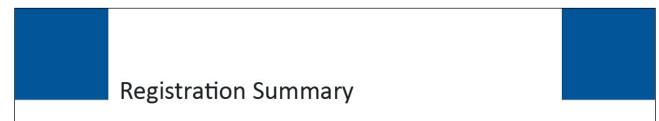
Slide notes

Once the Authorized Representative Information page appears, you will enter the following:

- Name: Name of the individual who has the legal authority to bind your organization to the terms of MMSEA Section 111 requirements and processing.
- Warning: The person named as the Authorized Representative cannot also be the Account Manager. The Authorized Representative cannot be a user of the Section 111 COBSW for any RRE ID and therefore cannot perform the Account Setup.
- Job Title: Job title of your named Authorized Representative.
- E-mail Address: Electronic mail address used by your Authorized Representative for work-related E-mail.
- Mailing Address: Company or work mailing address of your named Authorized Representative.
- Telephone: Company or work telephone number where your Authorized Representative can be reached.
- Fax: Company or work facsimile number used by your Authorized Representative.

Click the Continue button to proceed.

Slide 27 of 37 - Registration Summary

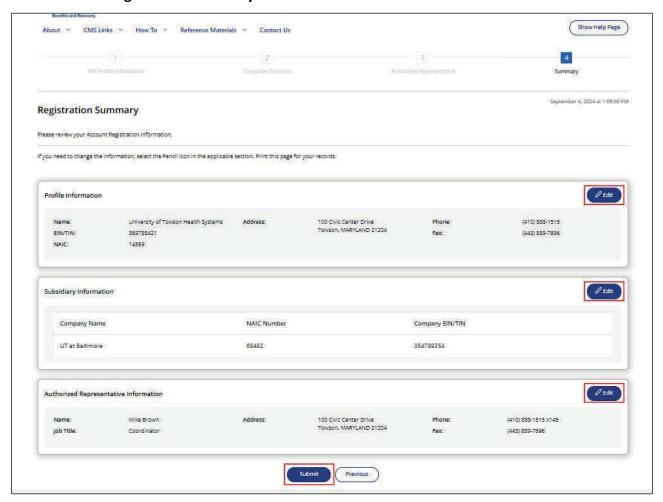


- · Account information is displayed
 - Review for accuracy
 - Edit information as needed
 - Print for your records

Slide notes

After you have completed the required Responsible Reporting Entity and Authorized Representative information, the account information you entered is displayed. Review this information for accuracy. If you need to change any of the information, click the 'Edit' button in the appropriate section.

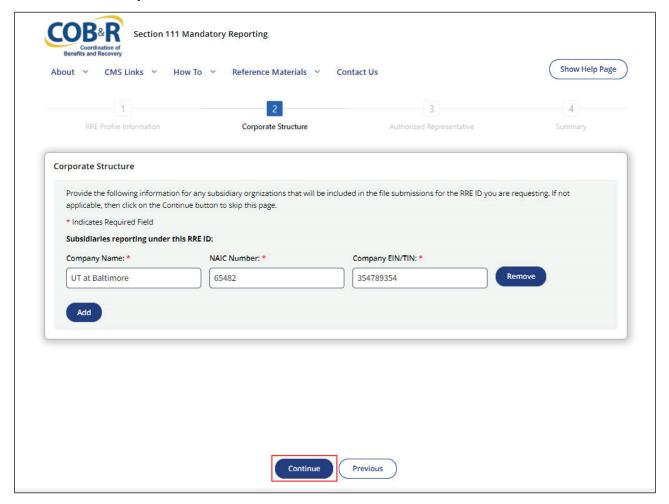
Slide 28 of 37- Registration Summary



Slide notes

The Registration Summary page displays the registration information that has been entered. If you need to change any of the information, click the Edit button under that section. Once you click the Edit button for a section, you will be taken to the appropriate information entry page. Add, change, or delete any of the information as needed.

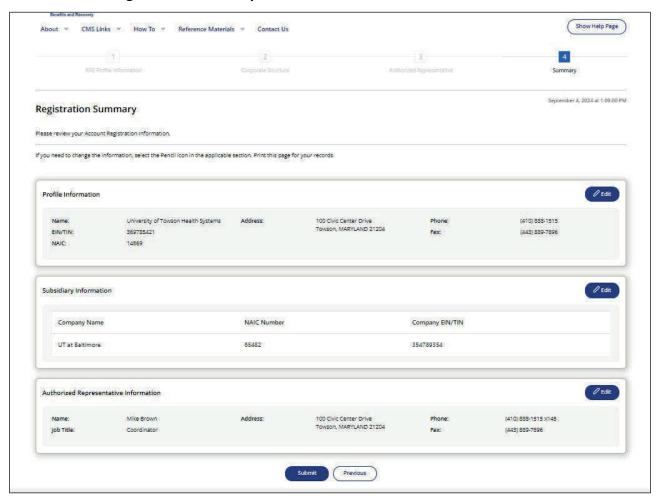
Slide 29 of 37 - Corporate Structure



Slide notes

Once the information has been corrected, click the Continue button to submit the information and return to the Registration Summary page.

Slide 30 of 37 - Registration Summary



Slide notes

If you erroneously provided the Account Manager information in the New Registration instead of the AR information, you must STOP. Do not complete the Account Setup step.

Contact the Electronic Data Interchange (EDI) Department to get the information corrected before proceeding to the Account Setup step. Once you have reviewed all the information on the Registration Summary page and would like to submit the information, click the Submit button.

Slide 31 of 37 - Account Registration Confirmation

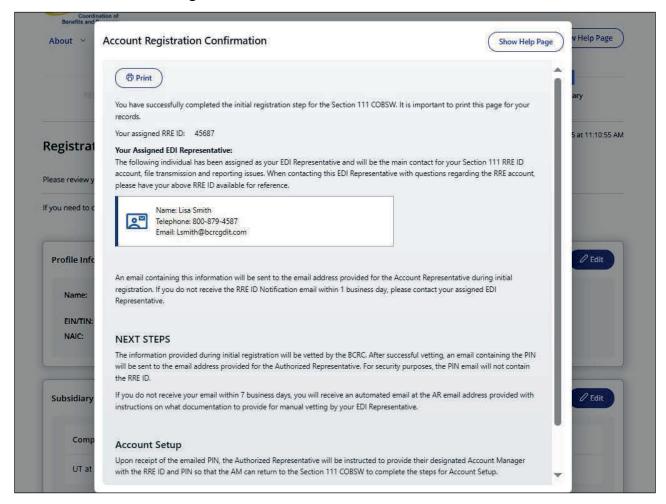


- Displayed after successful completion of registration
- RRE ID
- EDI Representative
 - Main contact for your account
 - Assist with file transmission and reporting issues
- Details on next steps
- Print for your records

Slide notes

After you have successfully completed the initial registration for the MMSEA Section 111 COBSW, an Account Registration Confirmation pop-up will appear. This page will contain your assigned RRE ID and EDI Representative information.

Slide 32 of 37 - Account Registration Confirmation



Slide notes

This page confirms that you completed Step 1, New Registration, in the Section 111 Registration Process. You are provided with an RRE ID and EDI Representative information. If you would like to return to the Section 111 COBSW Home page, click the Section 111 Home link or you may exit the Section 111 COBSW.

Slide 33 of 37 - Important Information to Consider

Important Information to Consider

- Supply
 - Authorized Representative's information during New Registration
 - Account Manager's information during Account Setup

Slide notes

Remember, you must supply your Authorized Representative information during the New Registration Step. The Account Manager's information will be provided by the Account Manager during the Account Setup step.

Slide 34 of 37 - Next Steps



Next Steps

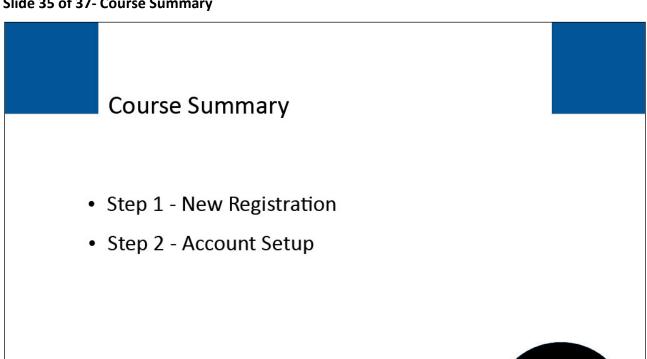
- The BCRC
 - Validates information
 - Sends PIN and and associated RRE ID to Authorized Representative
- Authorized Representative
 - Gives PIN and RRE ID to Account Manager
- Account Manager
 - Returns to Section 111 COBSW
 - Completes Account Setup

Slide notes

Once your registration application has been submitted, the information provided will be validated by the BCRC. When this is completed, the BCRC will send an email to the named AR with a personal identification number (PIN). The AR must give this PIN and RRE ID (provided on the Thank You page during registration) to their Account Manager to use to complete the next step in the registration process which is Account Setup. The Account Manager must return to the Section 111 COBSW to complete the Account Setup.

The Account Manager will need to enter the RRE ID and PIN on the main page to begin setup. If you do not receive your email within 7 business days, please contact your assigned EDI Representative. If you would like to return to the Section 111 COBSW Home page, click the Section 111 Home link.

Slide 35 of 37- Course Summary





Slide notes

Topics in the Section 111 COBSW curriculum included Step 1, New Registration and Step 2, Account Setup.

This course covered Step 1 - New Registration.

The Registration course described the process that must be completed for Section 111 registration. This process can also be found in the GHP User Guide.

Slide 36 of 37 - Conclusion





You have completed the COBSW Step 1 - New Registration course. Information in this course can be referenced by using the Section 111 COBSW User Guide's table of contents which can be accessed after logging in to the Section 111 COBSW.

Slide notes

You have completed the COBSW Step 1 - New Registration course. Information in this course can be referenced by using the Section 111 COBSW User Guide's table of contents which can be accessed after logging in to the Section 111 COBSW.

Slide 37 of 37 - GHP Training Survey



Slide notes

If you have any questions or feedback on this material, please go the following URL: GHP Training Survey GHP Training Survey.