COBSW Step 1 - New Registration Introduction

Slide 1 of 46 - 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 Liability Insurance (including Self-Insurance), No-Fault Insurance, and Workers' Compensation reporters.

Note: This module applies to Responsible Reporting Entities (RREs) that will be submitting Section 111 claim information via an electronic file submission as well as those RREs that will be submitting this information via direct data entry (DDE).

Slide 2 of 46 - 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 for the MMSEA Section 111 implementation. All affected entities are responsible for following the instructions found under the *Reference Materials* menu at the following link: https://www.imp.cob.cms.hhs.gov/mra/.

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 for the MMSEA Section 111 implementation.

All affected entities are responsible for following the instructions found at the following site: Section 111 COBSW.

Slide 3 of 46 - Course Overview

Course Overview

- Step 1 - New Registration

- Step 2 - Account Setup

Slide notes

Topics in the Section 111 COB Secure Website curriculum include Step 1, New Registration and Step 2, Account Setup. This course will cover Step 1 - New Registration.

You will need to define user roles (such as Authorized Representative, Account Manager, Account Designees) and determine how many RRE IDs you would like to obtain for this Responsible Reporting Entity (RRE) registration. This process can also be found in the Liability/No Fault/Workers' Compensation User Guide found at the following link: Liability/No-Fault/Workers' Compensation User Guide.

Slide 4 of 46 - PAID Act

Slide notes

The Medicare Secondary Payer (MSP) policy is designed to ensure that the Medicare Program does not pay for healthcare expenses for which another entity is legally responsible. To aid settling parties in determining this information, Congress has enacted the Provide Accurate Information Directly Act also known as the PAID Act requiring that CMS provide Non-Group Health Plans with a Medicare beneficiary's Part C and Part D enrollment information for the past three years.

This information will be provided both online and offline in the NGHP Query Response File. Additionally, CMS has requested that this solution also include the most recent Part A and Part B Entitlement dates.

Note: To support the PAID Act, the Query Response File will be updated to include Contract Number, Contract Name, Plan Number, Coordination of Benefits (COB) Address, and Entitlement Dates for the last three years (up to 12 instances) of Part C and Part D coverage. The updates will also include the most recent Part A and Part B entitlement dates.

Slide 5 of 46 - Introduction to the Section 111 COBSW

Introduction to the Section 111 COBSW

- Interface for RREs
    - Register
    - Submit files (SFTP or HTTPS submitters)
    - Attain response files
    - Review statistics
    - Submit and view claim information (DDE submitters)
    - Review status of data submissions

Slide notes

The Section 111 COB Secure Website (COBSW) provides an interface for RREs impacted by the Medicare Secondary Payer (MSP) reporting mandated by Section 111 of the Medicare, Medicaid, and SCHIP Extension Act of 2007 (MMSEA). This site will be used to register RREs with CMS.

Additionally, this site provides RREs and their agents with the ability to submit files (if the RRE ID has specified Secure File Transfer Protocol (SFTP) or Hypertext Transfer Protocol over Secure Socket Layer (HTTPS) as the file transfer method); attain generated response files; review statistical information related to file submissions; submit and view claim information if the RRE has specified the DDE option; and review the status of current data submissions.

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

Additionally, to improve customer service for newly registered users, the newly created RRE ID is now sent by email as well as shown on the confirmation page, along with the EDI Representative and next steps in account setup.

Slide 6 of 46 - Section 111 Mandatory Reporting Website Usage Warning

Slide notes

To begin registration, enter the following URL into your web browser: Section 111 COBSW.

When you first enter the Section 111 COBSW, the Section 111 Mandatory Reporting Website Usage Warning page 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 Usage Warning, you will be taken to the Section 111 COBSW Home page.

Slide 7 of 46 - Section 111 Mandatory Reporting Website Usage Warning

Slide notes

The Section 111 Mandatory Reporting Website Usage Warning will appear.

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

Slide 8 of 46 - Menu Options
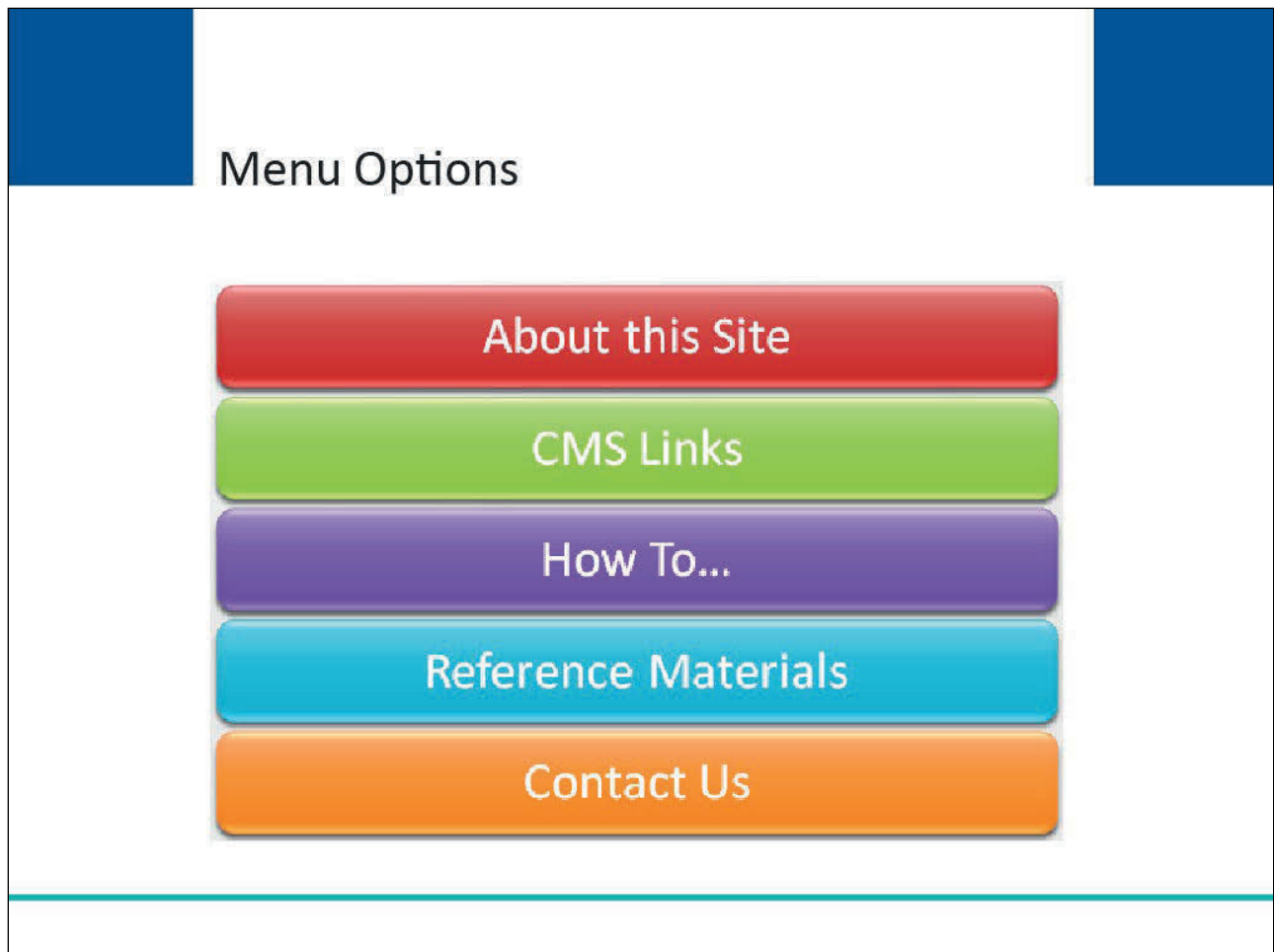
Slide notes

On the Section 111 COBSW Home page, you will find various menu options.

"About this Site" describes the purpose of the site and provides general information on how to use it.

"CMS Links" displays links to the dedicated MMSEA Section 111 Web pages and the Medicare Coordination of Benefits & Recovery Overview page on the CMS Website.

The "How To…" section provides general instructions on how to get started, register, and complete the account setup on the Section 111 COBSW.

"Reference Materials" displays links where you can view and download the Liability/No-Fault/Workers' Compensation (NGHP) User Guide.

Contact Us" provides information on how to contact the Benefits Coordination & Recovery Center (BCRC).

Slide 9 of 46 - Welcome to the COBSW

Slide notes

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

Slide 10 of 46 - Registration on the Section 111 COBSW

Slide notes

In order to begin using the Section 111 COBSW, a company representative for the RRE must first click on the "New Registration" button and then complete and submit the registration for the RRE.

Slide 11 of 46 - Welcome to the COBSW

Slide notes

Click on the New Registration button to register your company.

Click on the Account Setup button if you have gone through the initial registration process and need to complete your account setup.

Note: You can also access the New Registration and Account Setup links by scrolling to the bottom of the page.

Slide 12 of 46 - New Registration

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.

To improve customer service for newly registered users, the newly created RRE ID is now sent by email as well as shown on the confirmation page, along with the EDI Representative and next steps in account setup.

Slide 13 of 46 - Account Registration

Slide notes

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

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

Click the Cancel button to terminate the action.

Slide 14 of 46 - Welcome to the COBSW

Slide notes

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

Slide 15 of 46 - RRE Information

RRE Information

- EIN/TIN

- Company name and address

- Authorized Representative

- NAIC company code

- Company telephone number

- Reporter type (Liability/No-Fault/Workers' Compensation)

- Subsidiary company information (optional)

Slide notes

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

- An Employer Identification Number (EIN) or Federal Tax Identification Number (TIN) for the RRE;
- Company name and address;
- Company authorized representative (AR) contact information (name, job title, address, email address, phone);
- National Association of Insurance Commissioners (NAIC) company code;
- if applicable Company telephone number;
- Reporter Type (as a Liability/No-Fault/Workers' Compensation reporter, select Liability/No-Fault/Workers' Compensation); 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 16 of 46 - RRE ID Profile Information

Slide notes

Complete the information below for the Responsible Reporting Entity you are registering for this RRE ID.

- Company EIN/TIN: The IRS-assigned tax ID associated with the company reflected under this Section 111 registration. If you have more than one EIN, you may submit this registration with any one of those EINs.
  - If the RRE is a foreign RRE that does not have an IRS-assigned TIN, you can enter a fake or pseudo-TIN in the format of 9999xxxxx where 'xxxxx' is a 5-digit number created by the RRE.
    - Please note: Foreign RREs are defined by CMS as those that have no IRS-assigned TIN and/or US mailing address. Guam, Puerto Rico, and the US Virgin Islands are considered part of the US.
- Company Name: The company name associated with the Section 111 registration.
- Company Address: The corporate address associated with the TIN or EIN supplied. For foreign RREs, select "Foreign Country" from the State dropdown menu. The rest of the address fields are not required.

Slide 17 of 46 - RRE ID Profile Information

Slide notes

- 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. Note: For foreign RREs, enter a United States telephone number, if applicable.
- Company Fax: Facsimile number of your corporate office.
- Reporter Type: Type of RRE. As a Liability/No Fault/Workers' Compensation reporter, select Liability/No Fault/Workers' Compensation by clicking the appropriate radio button.

Click the Continue button to proceed.

Slide 18 of 46 - 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.

Slide 19 of 46 - Corporate Structure

Slide notes

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 are in compliance with the Section 111 reporting requirements.

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

Slide 20 of 46 - 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 Section 111 COBSW.

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

Slide 21 of 46 - Corporate Structure

Slide notes

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 22 of 46 - Corporate Structure

Slide notes

- Subsidiary Company Name(s): Supply the names of all the subsidiary companies reflected in this registration for which data will be submitted.

Slide 23 of 46 - Corporate Structure

Slide notes

- 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.

Slide 24 of 46 - Corporate Structure

Slide notes

- EIN(s)/TIN(s): Supply the corresponding EIN/TIN for each subsidiary company listed.

Slide 25 of 46 - Corporate Structure

Slide notes

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

To remove a listed subsidiary, click the Remove button next to the corresponding row of information.

Slide 26 of 46 - Corporate Structure

Slide notes

Click the Continue button to proceed to the next step.

Slide 27 of 46 - Authorized Representative Information

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 28 of 46 - Authorized Representative

Slide notes

The Authorized Representative page will appear. The email address of the user will display. Click Continue to provide contact information for the Authorized Representative (AR) for the RRE ID you are requesting.

Slide 29 of 46 - Authorized Representative Information

Slide notes

- 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.

Slide 30 of 46 - Authorized Representative Information

Slide notes

- Job Title: Job title of your named Authorized Representative.

Slide 31 of 46 - Authorized Representative Information

Slide notes

- 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.

Slide 32 of 46 - Authorized Representative Information

Slide notes

Click the Continue button to proceed.

Slide 33 of 46 - Registration Summary

Slide notes

After you have completed the required RRE 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. Print this page out for your records.

Slide 34 of 46 - Registration Summary

Slide notes

The Registration Summary page displays the registration information that has been entered.

Slide 35 of 46 - Registration Summary

Slide notes

If you need to change any of the information, click the Edit button under that section.

Slide 36 of 46 - Corporate Structure

Slide notes

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 37 of 46 - Corporate Structure

Slide notes

Once the information is correct, click the Continue button to submit the information and return to the Registration Summary page.

Slide 38 of 46 - Registration Summary

Slide notes

Once you have reviewed all information on the Registration Summary page and would like to submit the information, click the Submit button on the bottom of the page.

If you erroneously provided the Account Manager information in the New Registration instead of the Authorized Representative 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.

Slide 39 of 46 - Account Registration Confirmation Pop-up

Account Registration Confirmation Pop-up

- Displayed after succcessful completion of registration

- RRE ID

- EDI Representative

  - Main contact for your account
  - Assist with data 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, a Thank You page is displayed. This page will contain your assigned RRE ID and EDI Representative information.

Your EDI Representative is your main contact for your Section 111 RRE account and will assist you with data transmission and reporting issues. Details on what steps to take next are also provided on this page. Please print this page for your records. Additionally, to improve customer service for newly registered users, the newly created RRE ID is now sent by email as well as shown on the confirmation page, along with the EDI Representative and next steps in account setup.

Slide 40 of 46 - Account Registration Confirmation

Slide notes

This page confirms that you completed Step 1, New Registration, in the Section 111 Registration Process.

Slide 41 of 46 - Account Registration Confirmation

Slide notes

You will be provided with an RRE ID and EDI Representative information. You will need to record the assigned RRI ID to provide to your Account Manager. If you would like to return to the Section 111 COBSW Home page, click the Section 111 Home button or you may exit the Section 111 COBSW.

Slide 42 of 46 - 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 43 of 46 - Next Steps

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 Authorized Representative with a personal identification number (PIN). The Authorized Representative must give this PIN and RRE ID 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 mailing within 10 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 44 of 46 - Course Summary

Slide notes

Topics in the Section 111 COB Secure Website curriculum included Step 1, New Registration and Step 2, Account Setup. This course covered Step 1- New Registration.

Before starting Step 1, remember to review the Section 111 Registration course which precedes this course. The Registration course describes the Section 111 registration process.

Slide 45 of 46 - Conclusion

Slide notes

You have completed the Step 1 - New Registration Course. Information in this presentation can be referenced by the NGHP User Guide's table of contents and any subsequent alerts. These documents are available for download at the following link: CMS NGHP Website .

Slide 46 of 46 - NGHP Training Survey

Slide notes

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