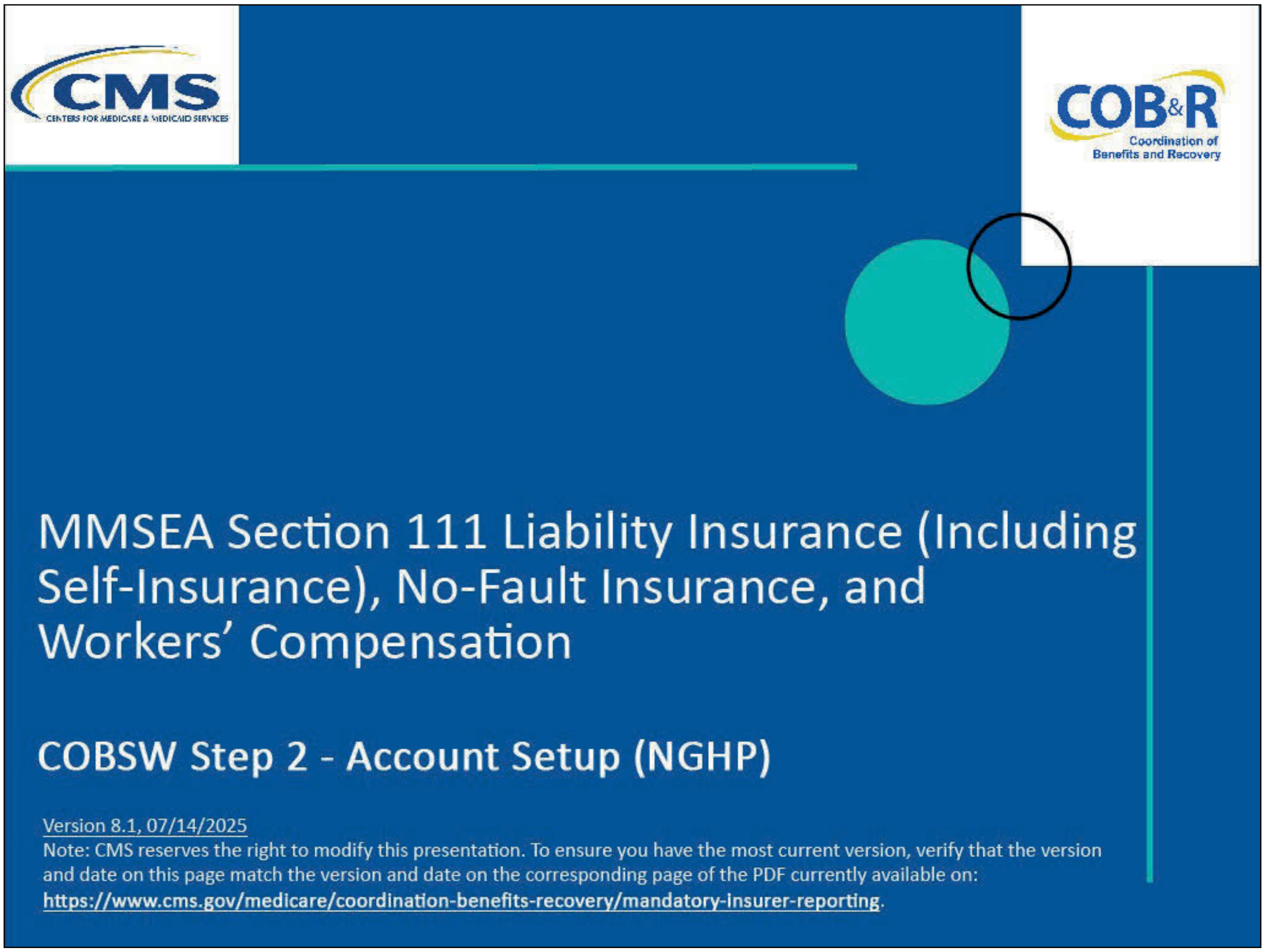
COBSW Step 2 - Account Setup NGHP Introduction

Slide 1 of 43 - COBSW Step 2 - Account Setup NGHP Introduction

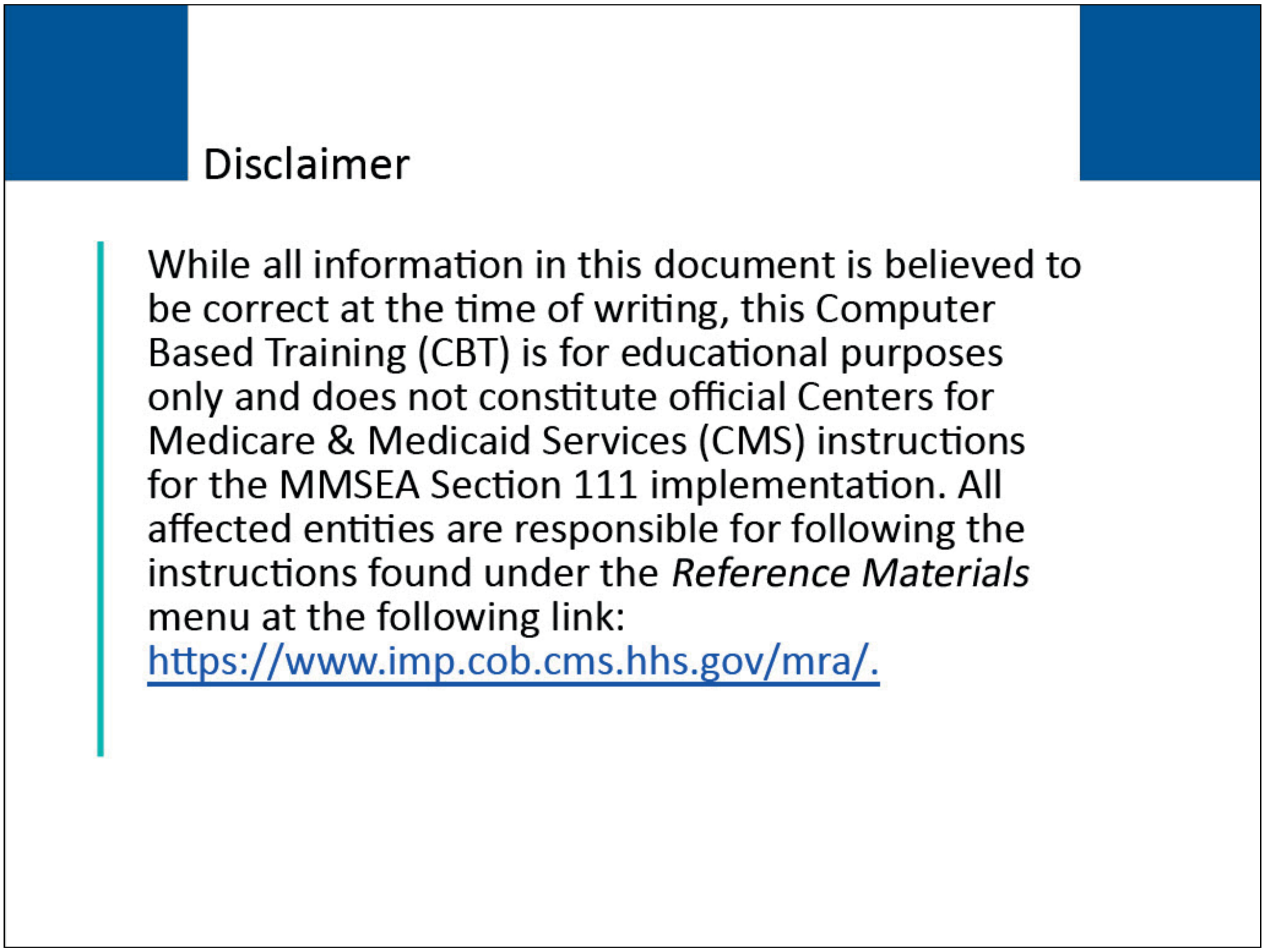


Slide notes

Welcome to the Section 111 Coordination of Benefits (COB) Secure Website Step 2 - Account Setup (NGHP) course.

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 43 - Disclaimer



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 43 - Course Overview

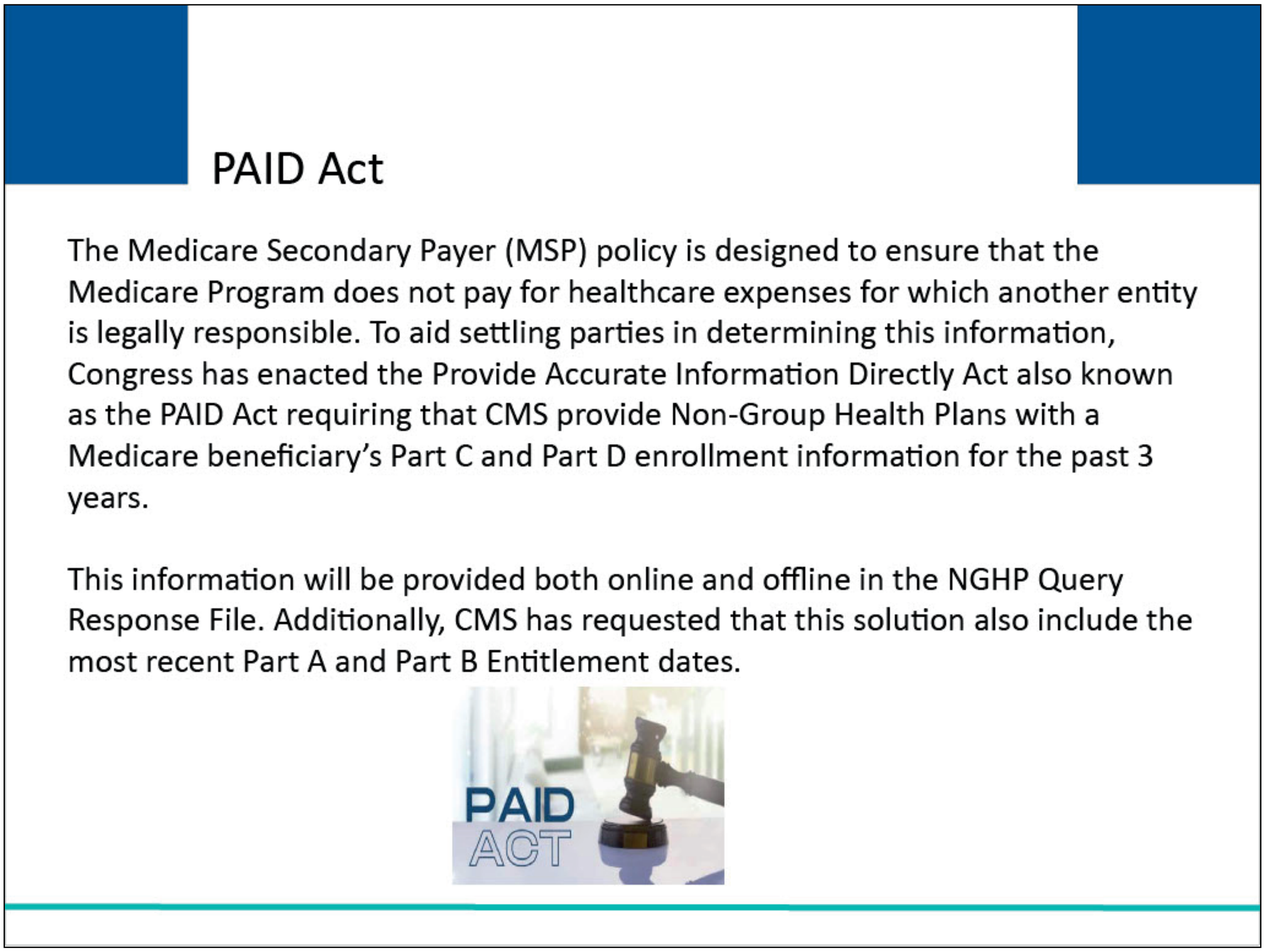
Course Overview

- Step 1
  - New Registration
- Step 2
  - Account Setup (NGHP)

Slide notes

This course will cover Step 2 - Account Setup (NGHP) on the Section 111 COBSW.

Slide 4 of 43 - PAID Act



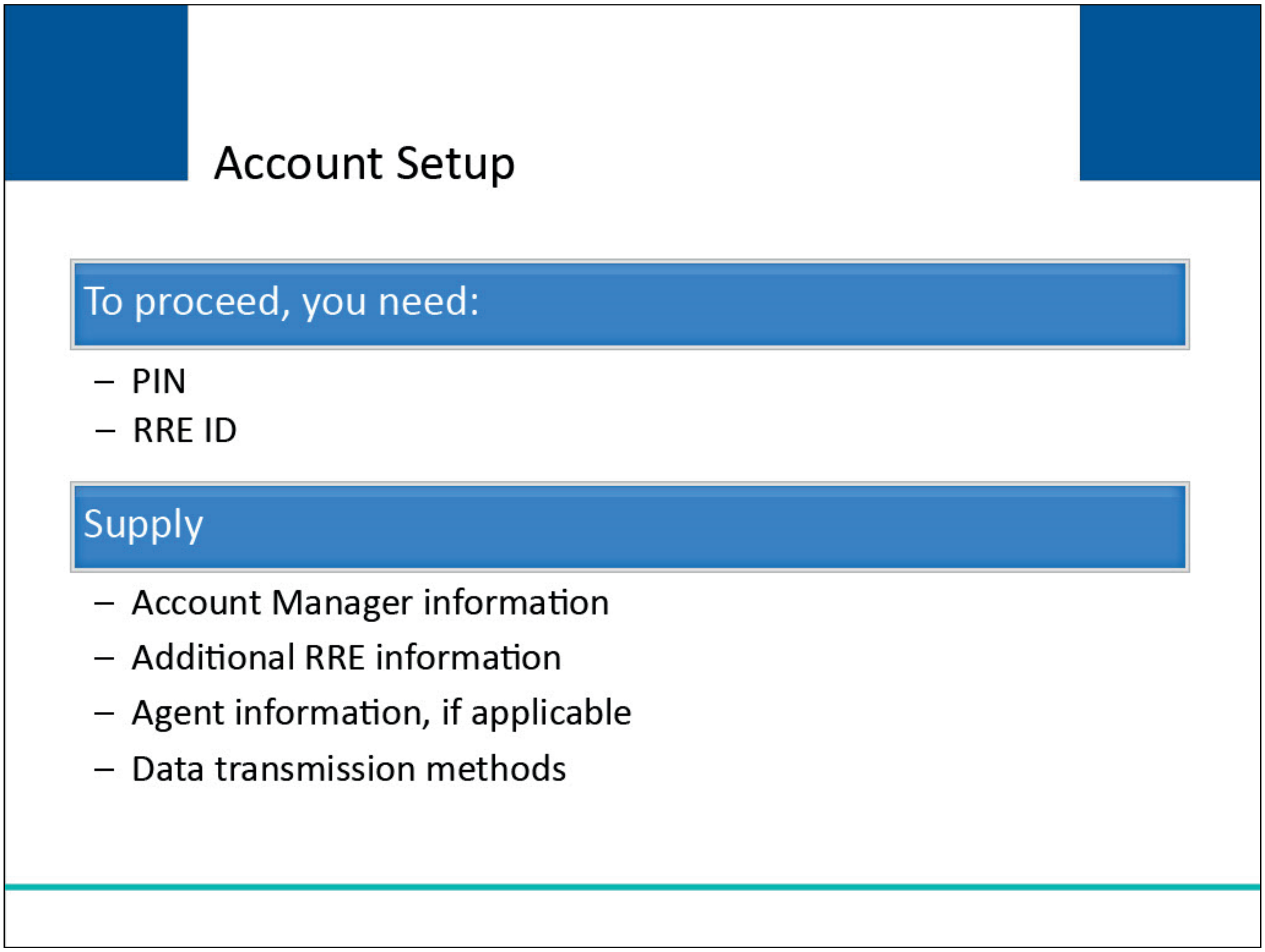
Slide notes

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 43 - Account Setup



Slide notes

You may begin Account Setup (Step 2) if you have already completed New Registration (Step 1) and your RRE’s Authorized Representative received an email from the Benefits Coordination & Recovery Center (BCRC) containing the Personal Identification Number (PIN) associated with your Responsible Reporting Entity Identification Number (RRE ID).

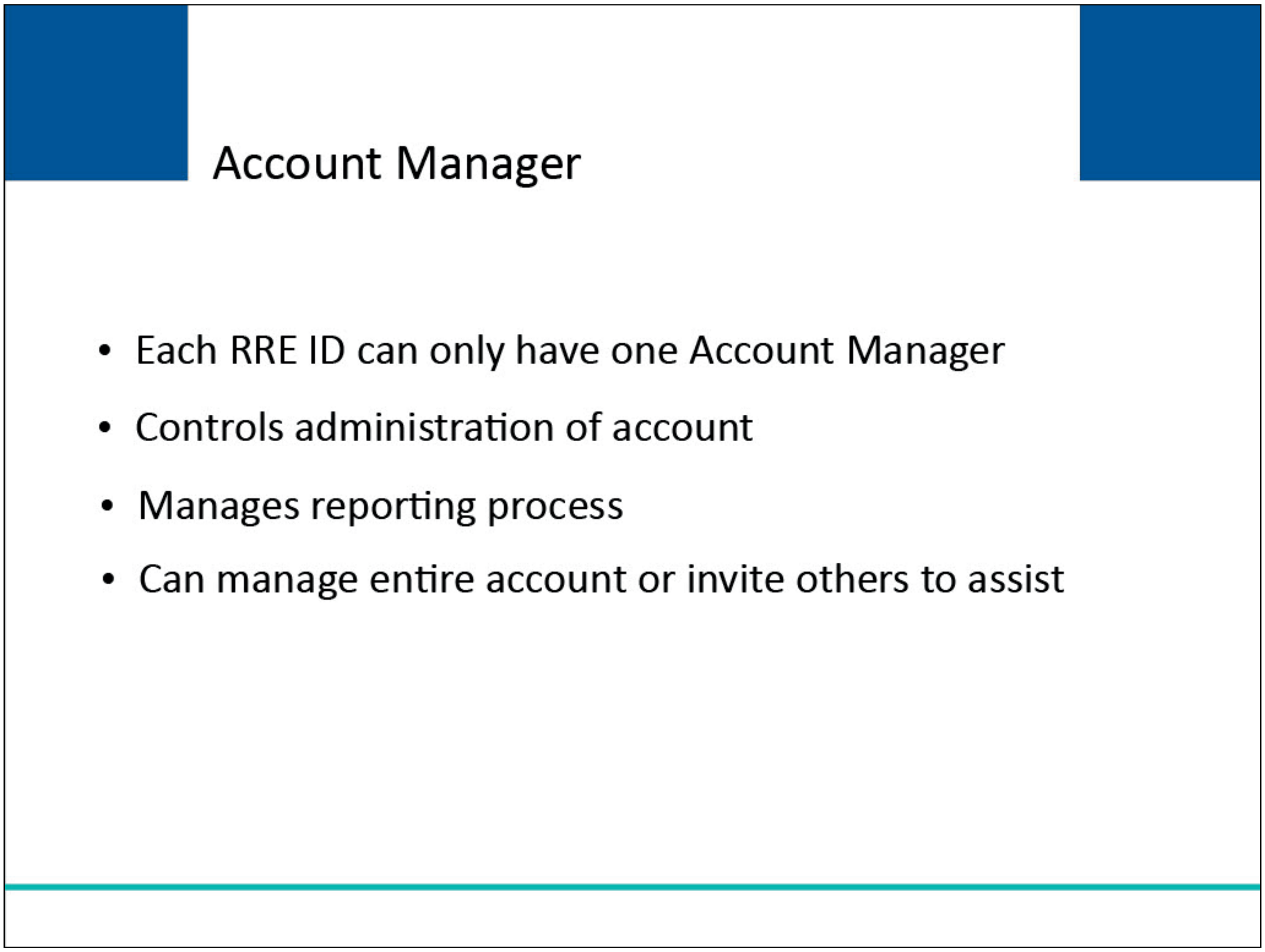
You will need the RRE ID and PIN to continue with the Account Setup process.

Before beginning this step, you must identify your Account Manager because they are responsible for completing this step in the Section 111 Registration process.

During Account Setup, account manager information, additional RRE information, agent information (if you are using an agent), and data transmission information will be entered.

Please Note: If you are selecting the Connect:Direct via CMS EFT method, you must have the destination dataset names available or this step cannot be completed and all the other data you provided will be lost.

Slide 6 of 43 - Account Manager

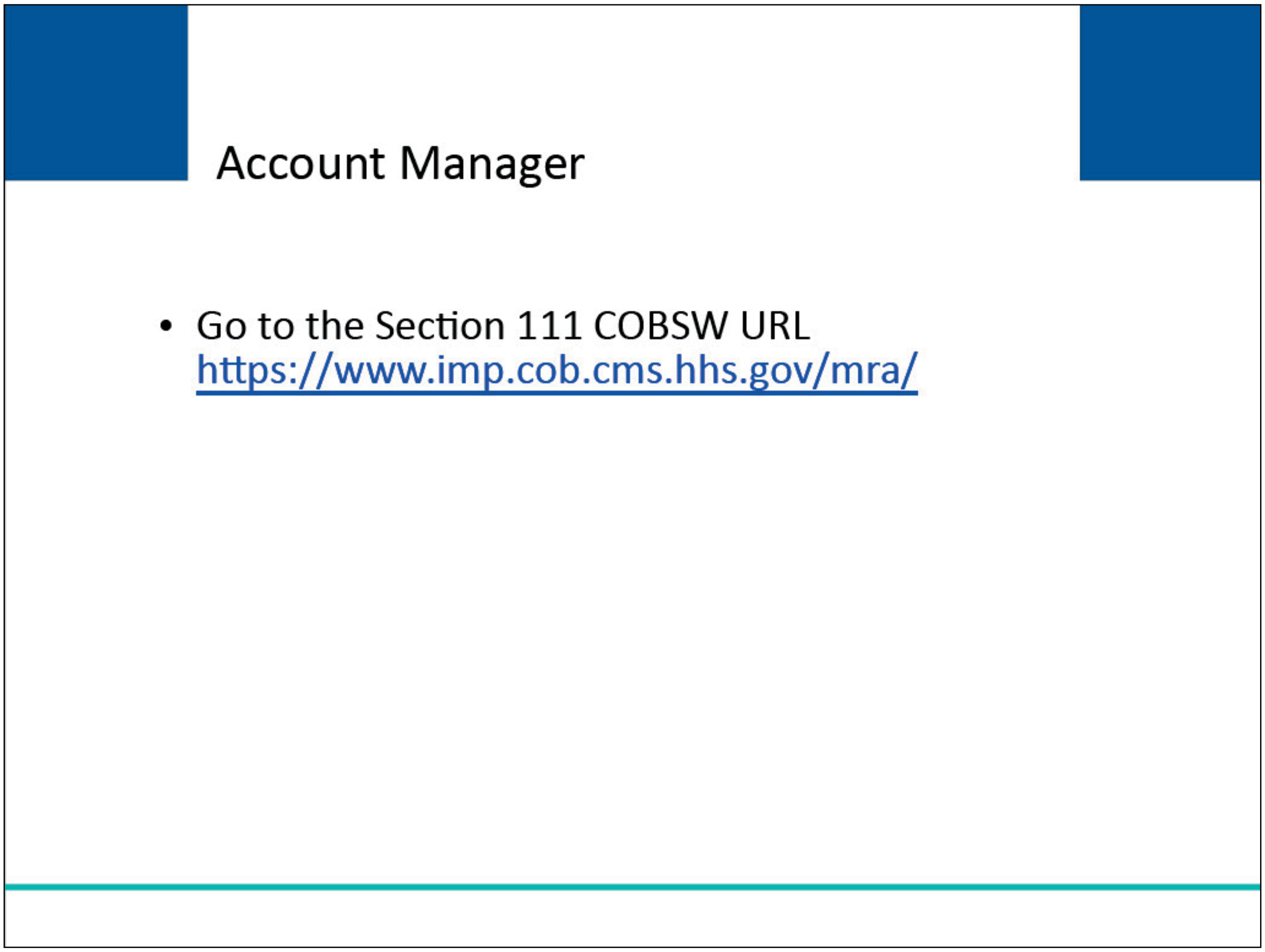


Slide notes

Each RRE ID can have only one Account Manager. This is the individual who controls the administration of an RRE’s account and manages the overall reporting process.

The Account Manager may choose to manage the entire account and data exchange or may invite other company employees or data processing agents to assist.

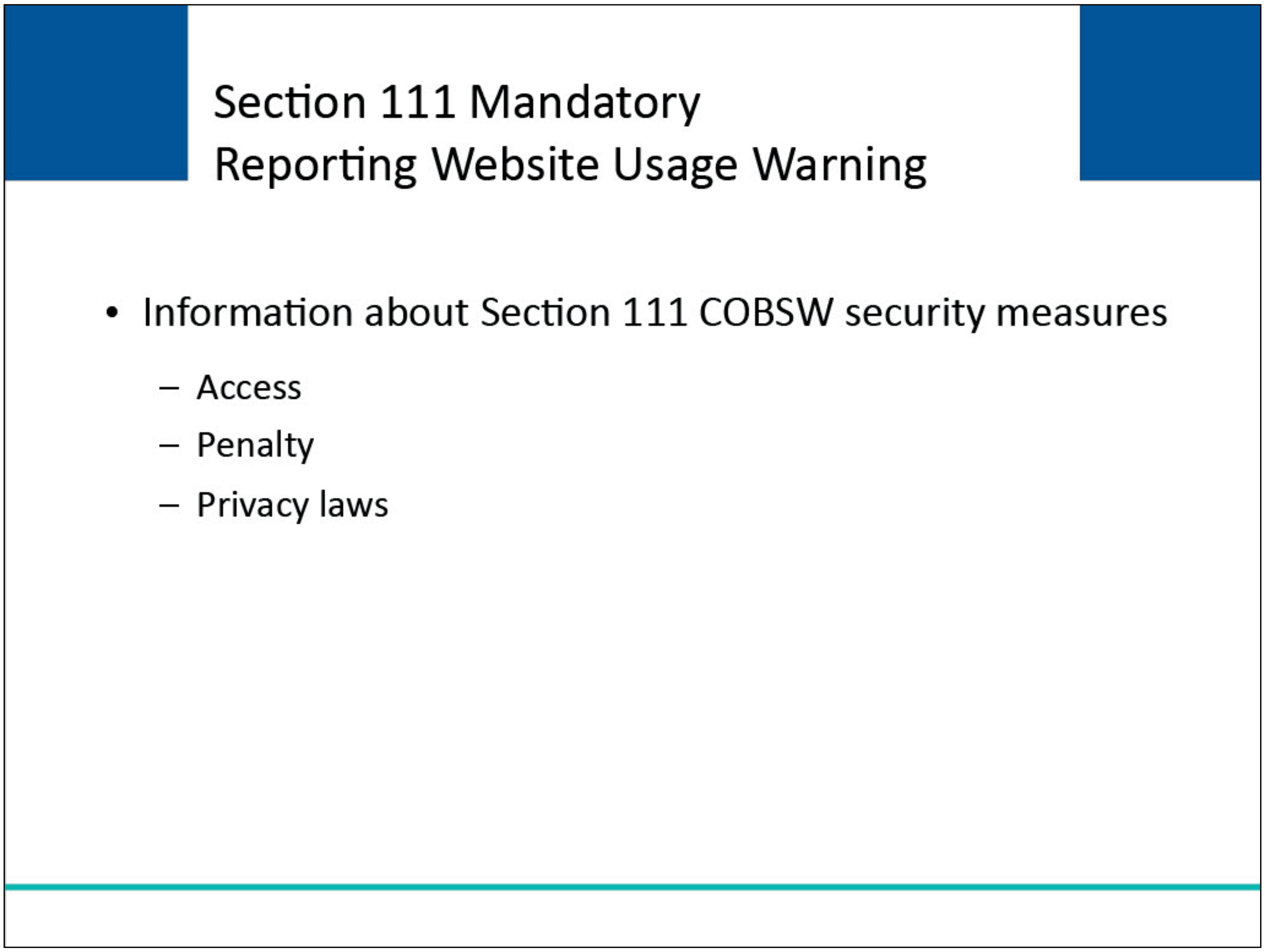
Slide 7 of 43 - Account Manager



Slide notes

In order to perform the RRE account setup tasks, the RRE's Account Manager must access the Section 111 COBSW.

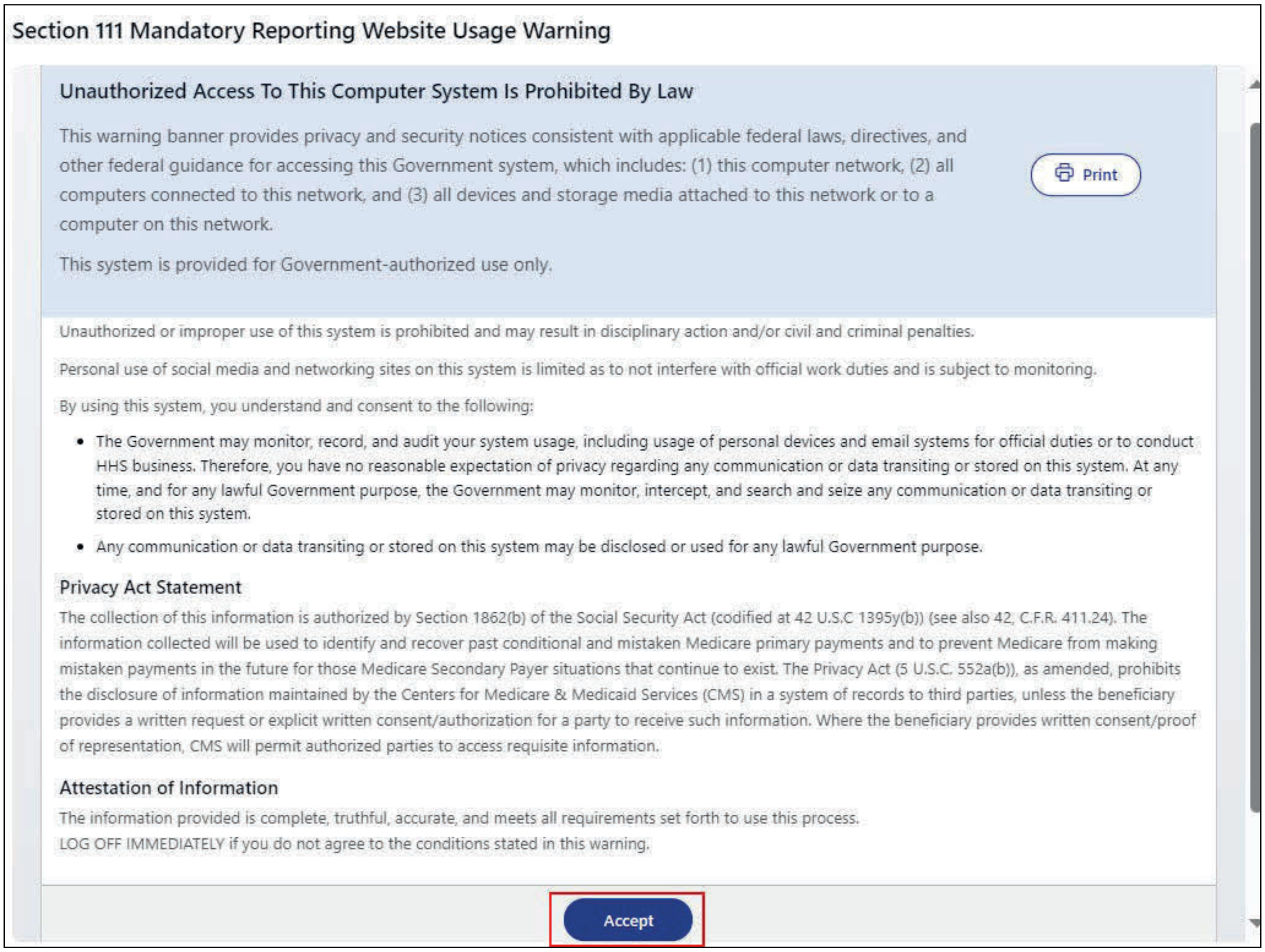
Slide 8 of 43 - Section 111 Mandatory Reporting Website Usage Warning



Slide notes

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 login warning, you will be brought to the Section 111 COBSW Home page.

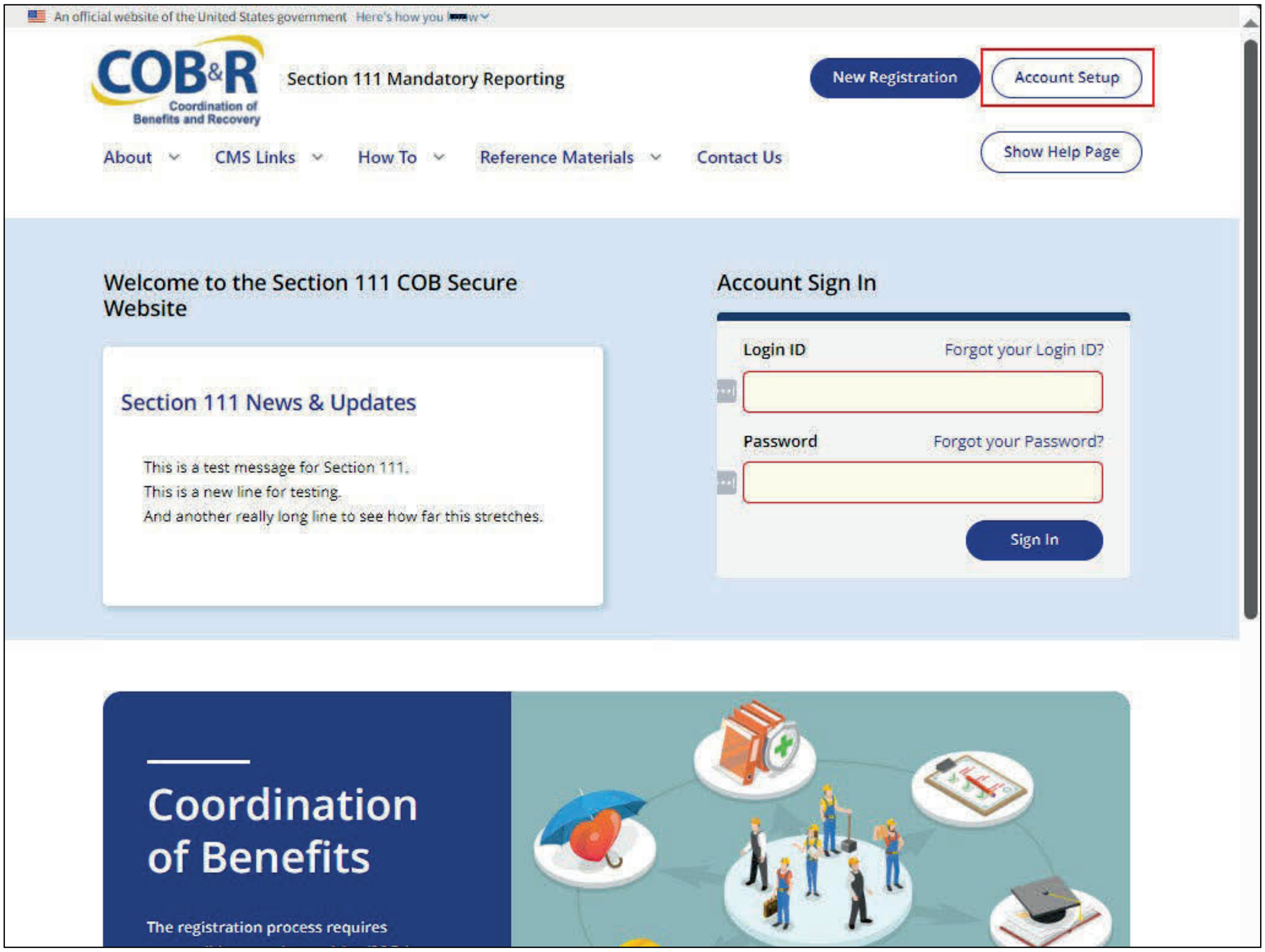
Slide 9 of 43 - Section 111 Mandatory Reporting Website Usage Warning



Slide notes

Once the Section 111 Mandatory Reporting Website Usage Warning page appears, click the Accept link to proceed to the Section 111 COBSW Home page.

Slide 10 of 43 - Welcome to the Section 111 COBSW

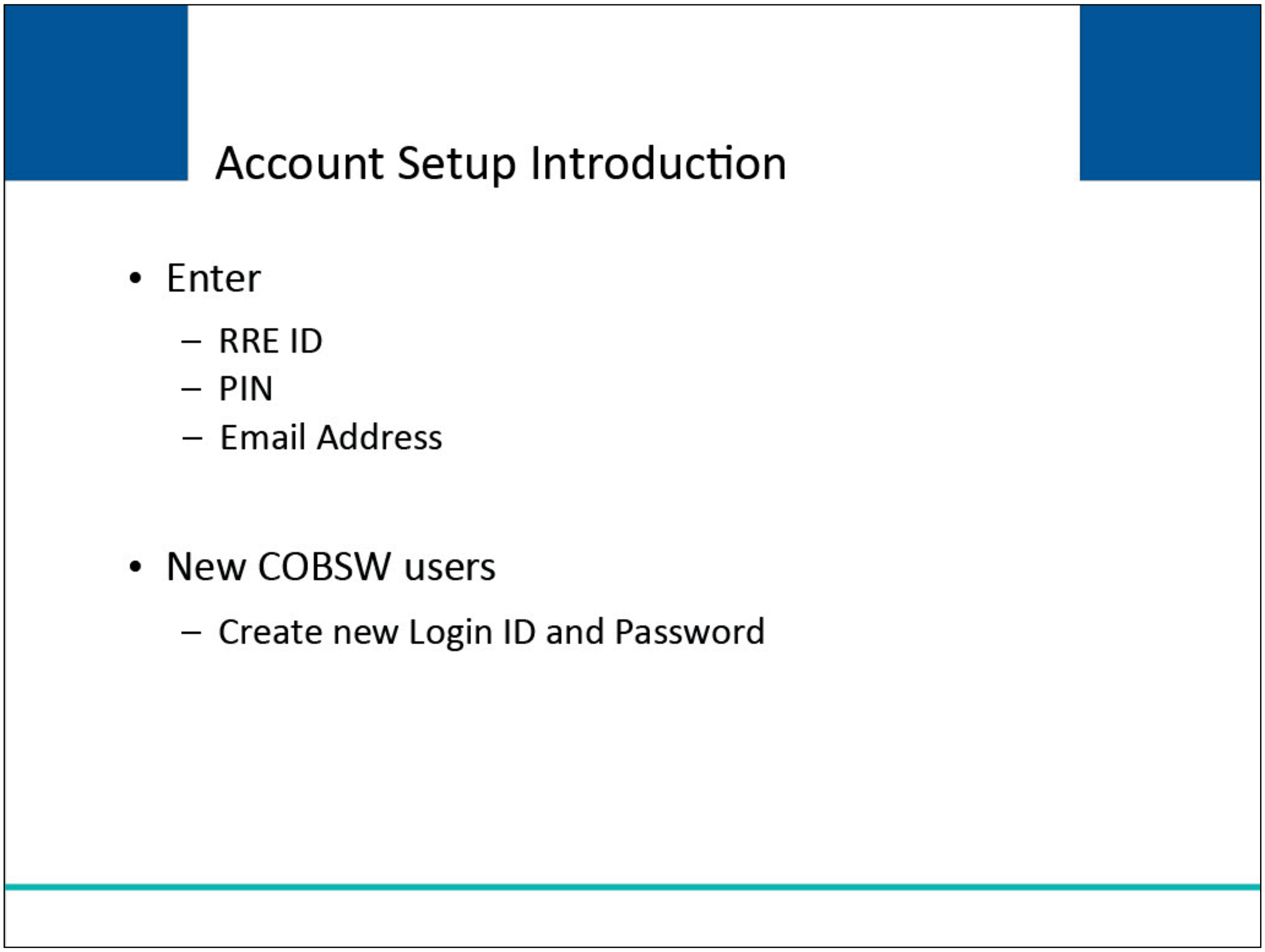


Slide notes

The Welcome to the Section 111 COB Secure Website/Sign In page will appear. Click on the Account Setup (NGHP) button to begin.

Note: You can access the link from the top right-hand corner of the page and also from the links in the Getting Started section by scrolling to the bottom of the page.

Slide 11 of 43 - Account Setup Introduction



Slide notes

The Account Setup Introduction page requires you to enter the RRE ID recorded by the Account Representative on the Thank You page during initial registration and the PIN that was emailed to them.

Your email address is also required to determine whether you are a registered user.

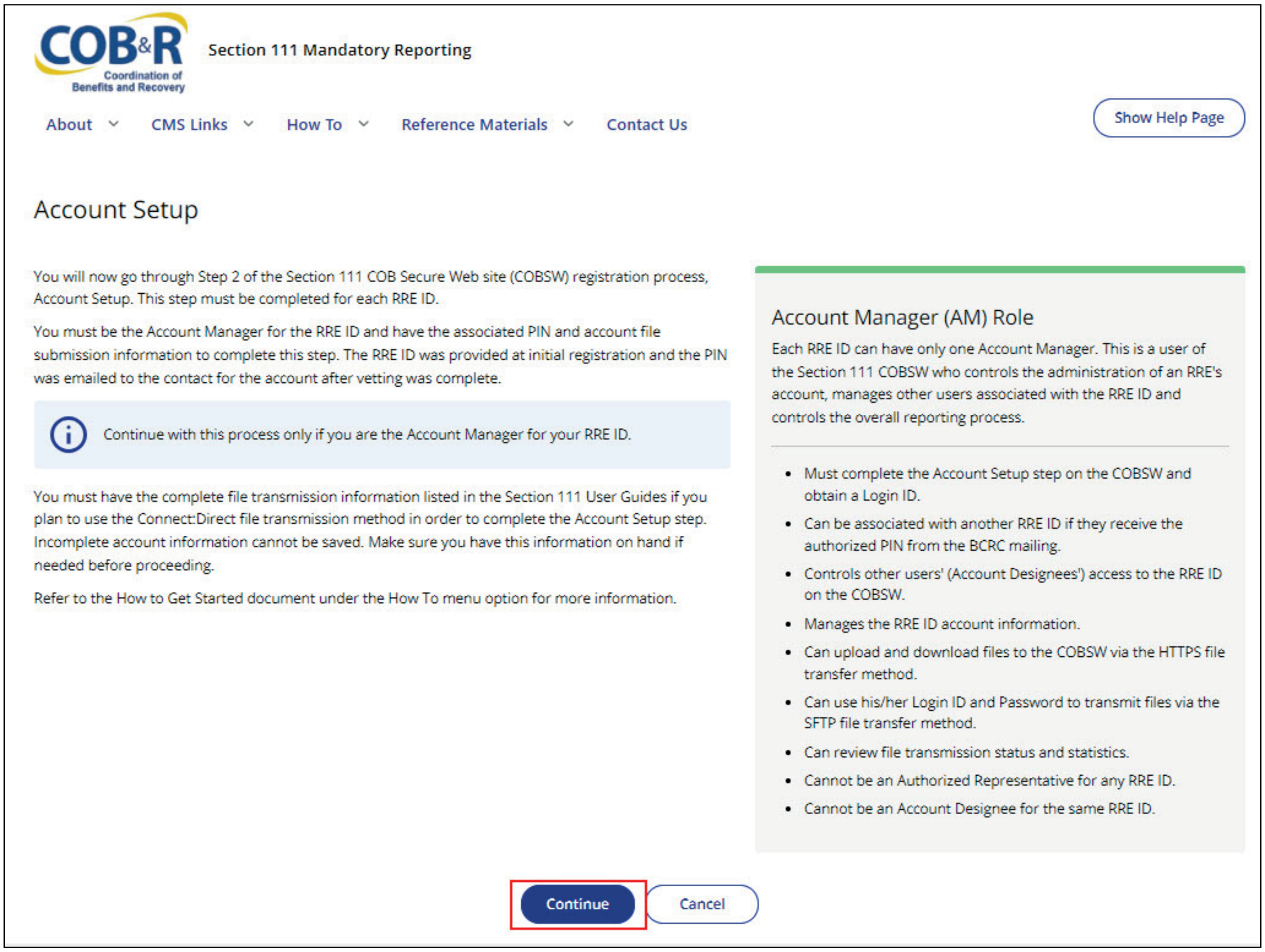
New users must go through the process of creating a new Login ID and Password before setting up an RRE account.

If you have already registered to use the Section 111 COB Secure Website, you will not be prompted to create a Login ID and Password.

The Account Manager should complete this step in the Section 111 Registration process.

The individual who completes the Account Setup is automatically the Account Manager, so plan this step accordingly.

Slide 12 of 43 - Account Setup Introduction

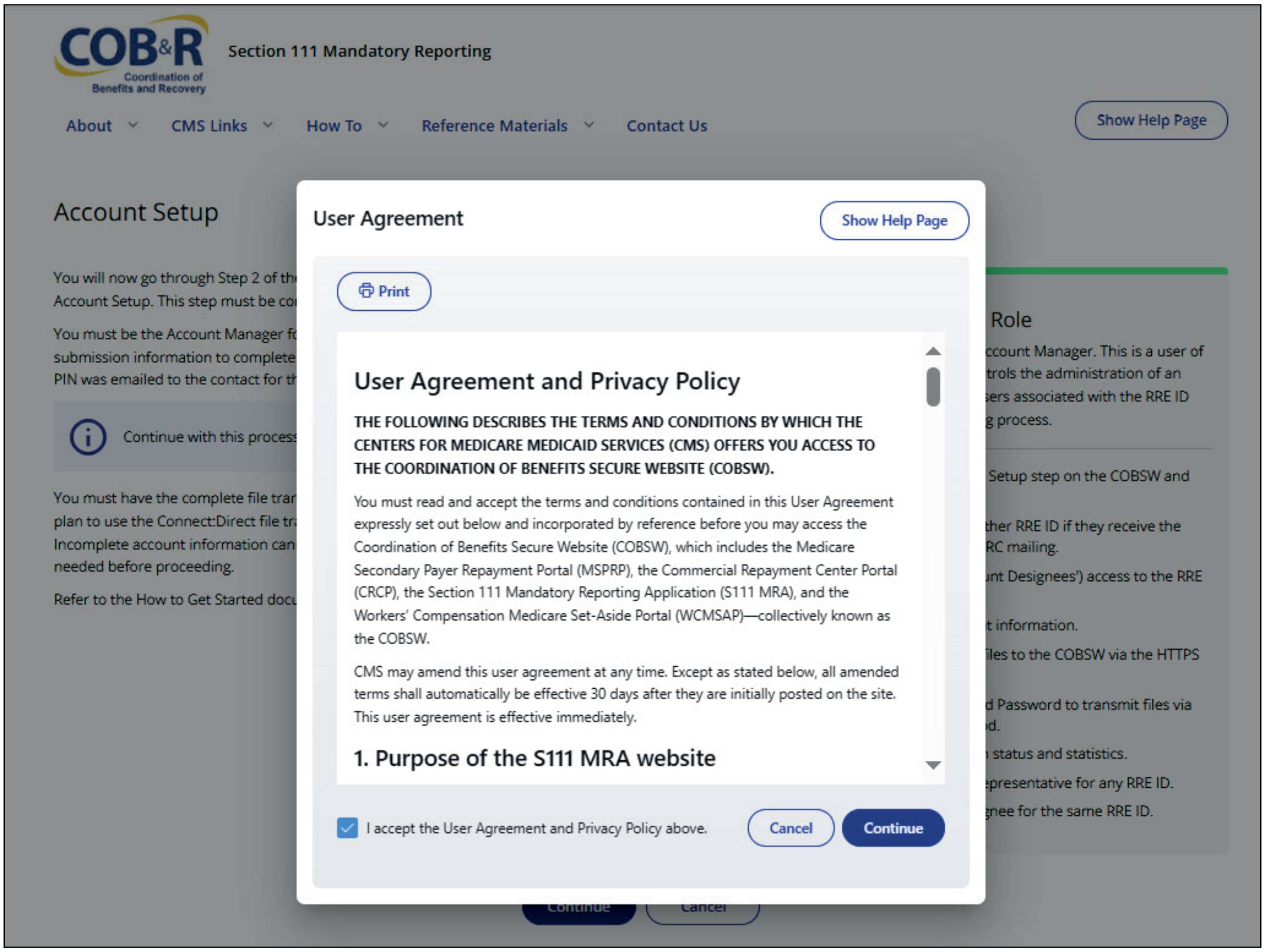


Slide notes

The Account Setup page will appear. Click the Continue button to proceed to the next page of Account Setup.

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

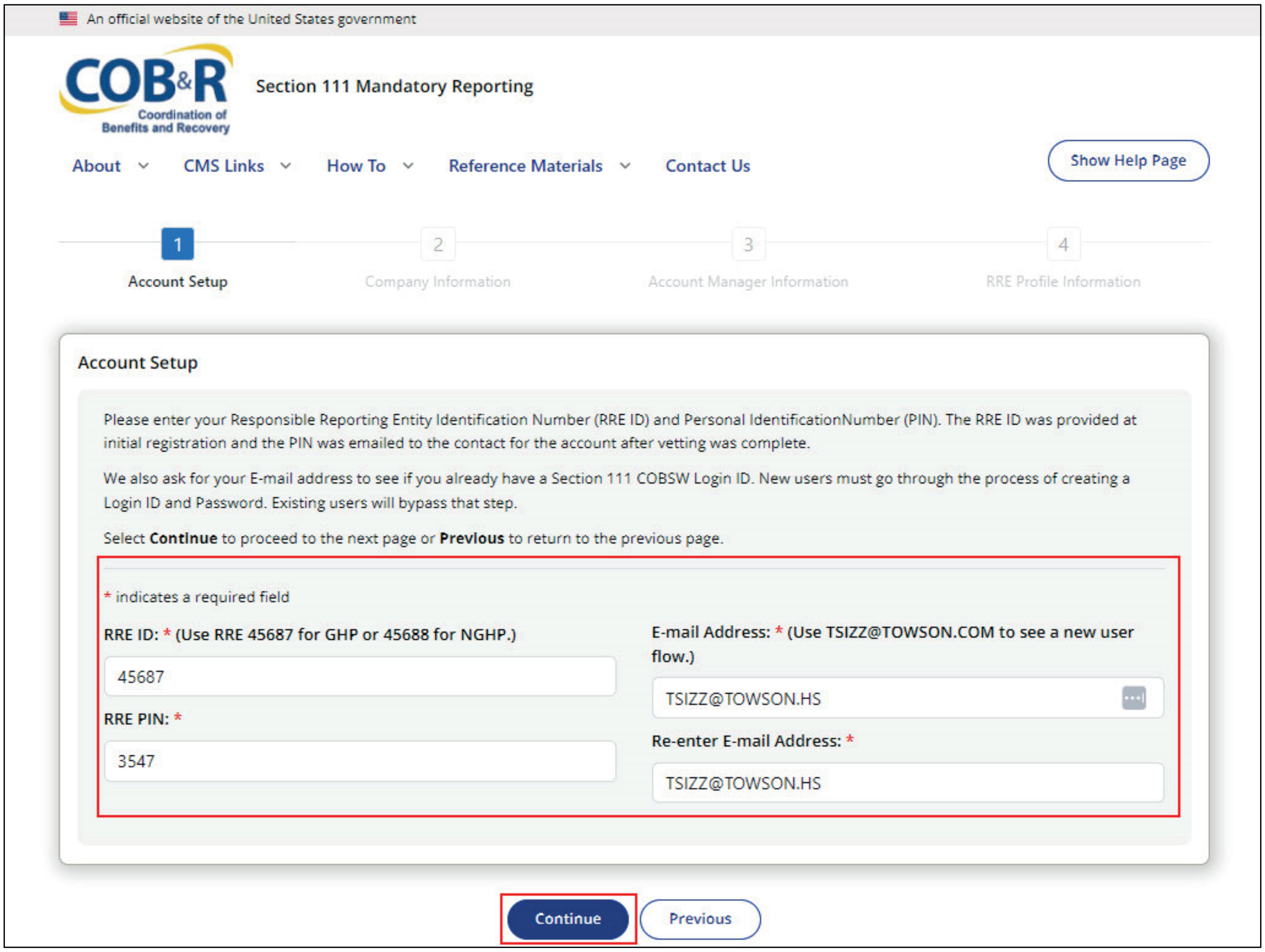
Slide 13 of 43 - Account Setup User Agreement



Slide notes

The Account Setup User Agreement pop up box will appear. You will need to check the I accept the User Agreement and Private Policy above checkbox and click Continue. You can click Cancel to return to the Introduction page at any time.

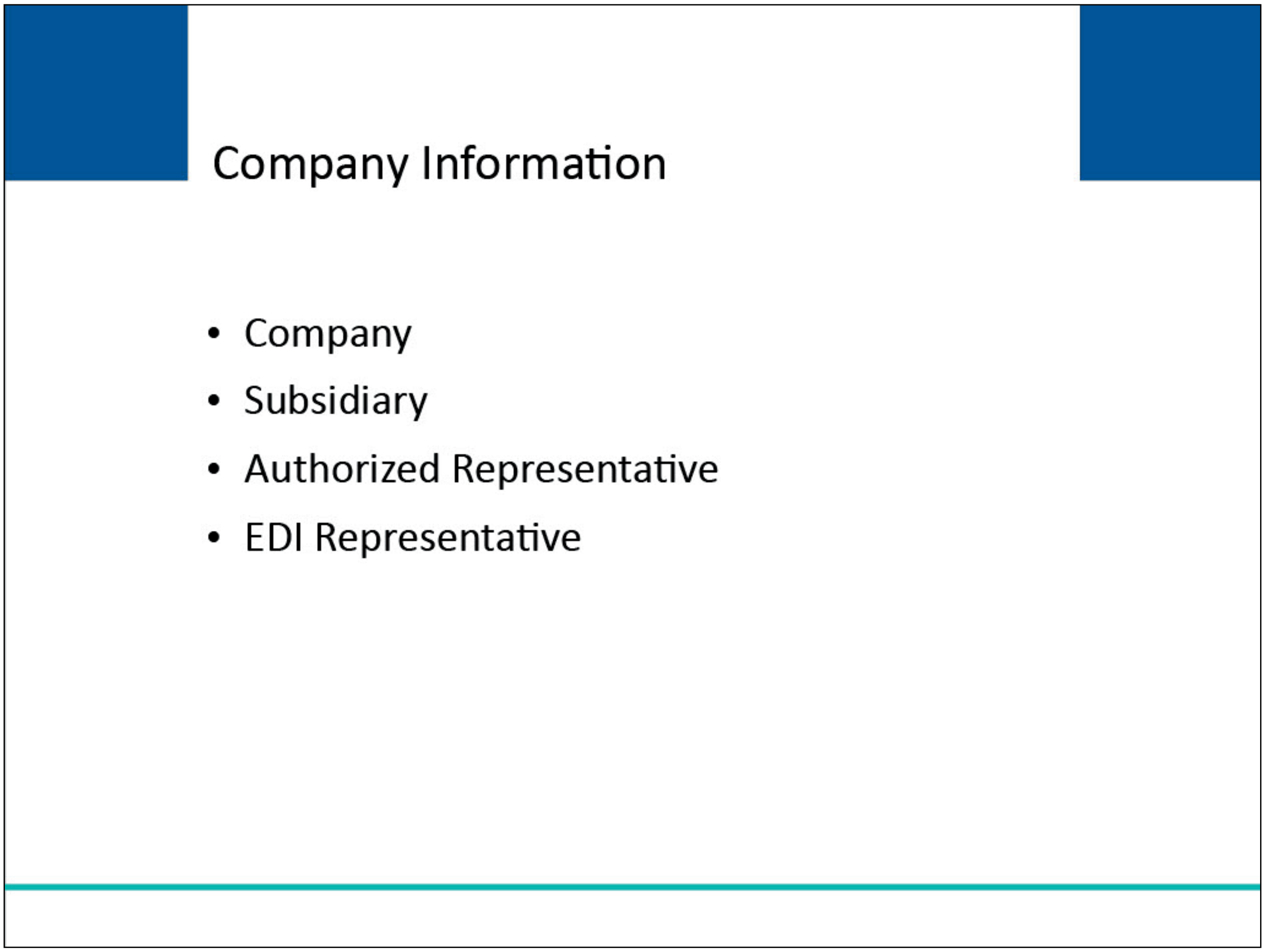
Slide 14 of 43 - Account Setup Page



Slide notes

The Account Setup page will appear. Enter the RRE ID, RRE PIN, Email address, and then re-enter the Email Address. Once all information has been entered, click Continue.

Slide 15 of 43 - Company Information

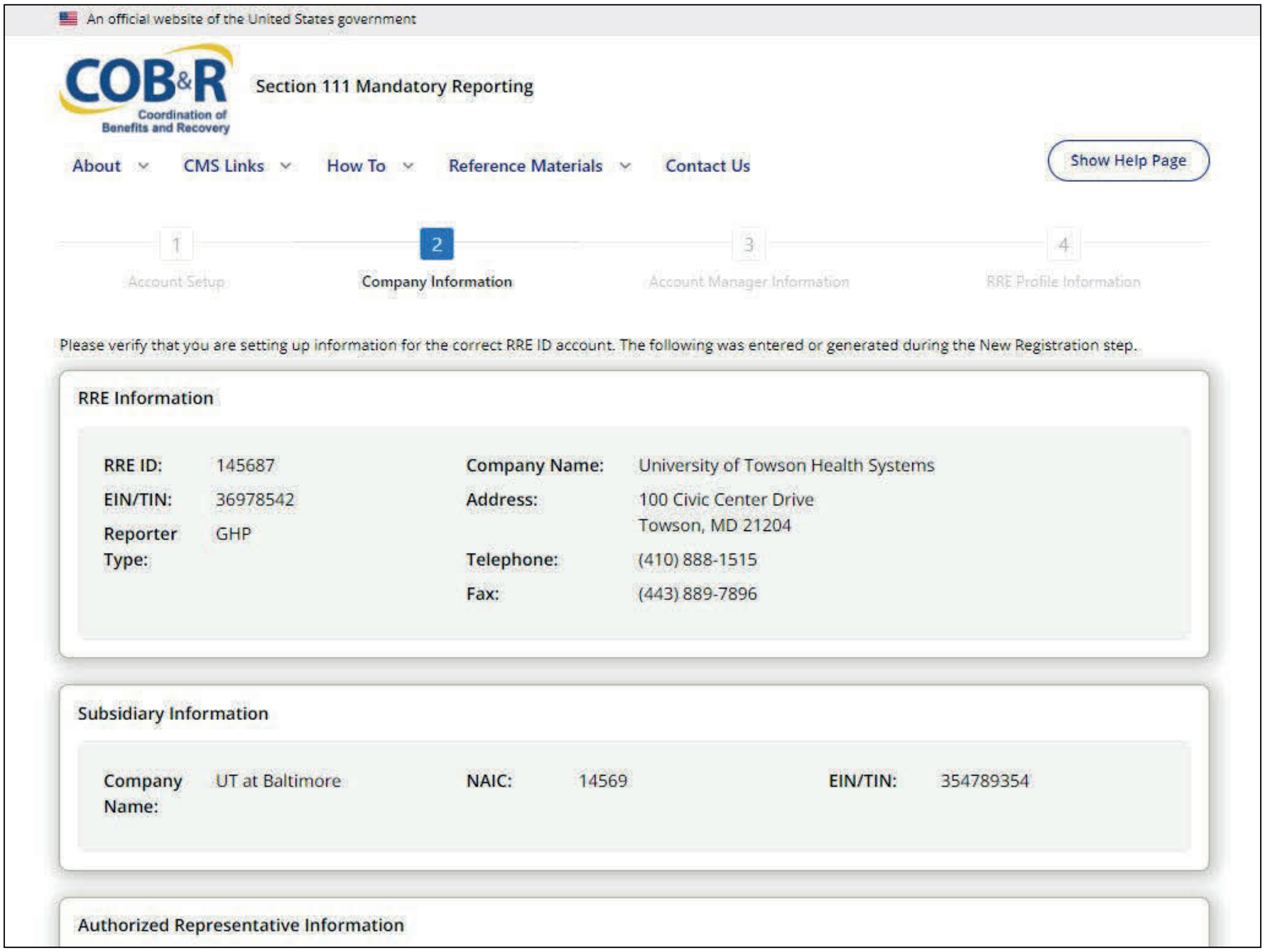


Slide notes

The Company Information page displays information for the company, subsidiaries, Authorized Representative, and (Electronic Data Interchange) EDI Representative associated with this RRE ID.

You will need to review this information for accuracy. If any of the data is incorrect, you will be able to edit the data once you have created a Login ID for the Section 111 COBSW.

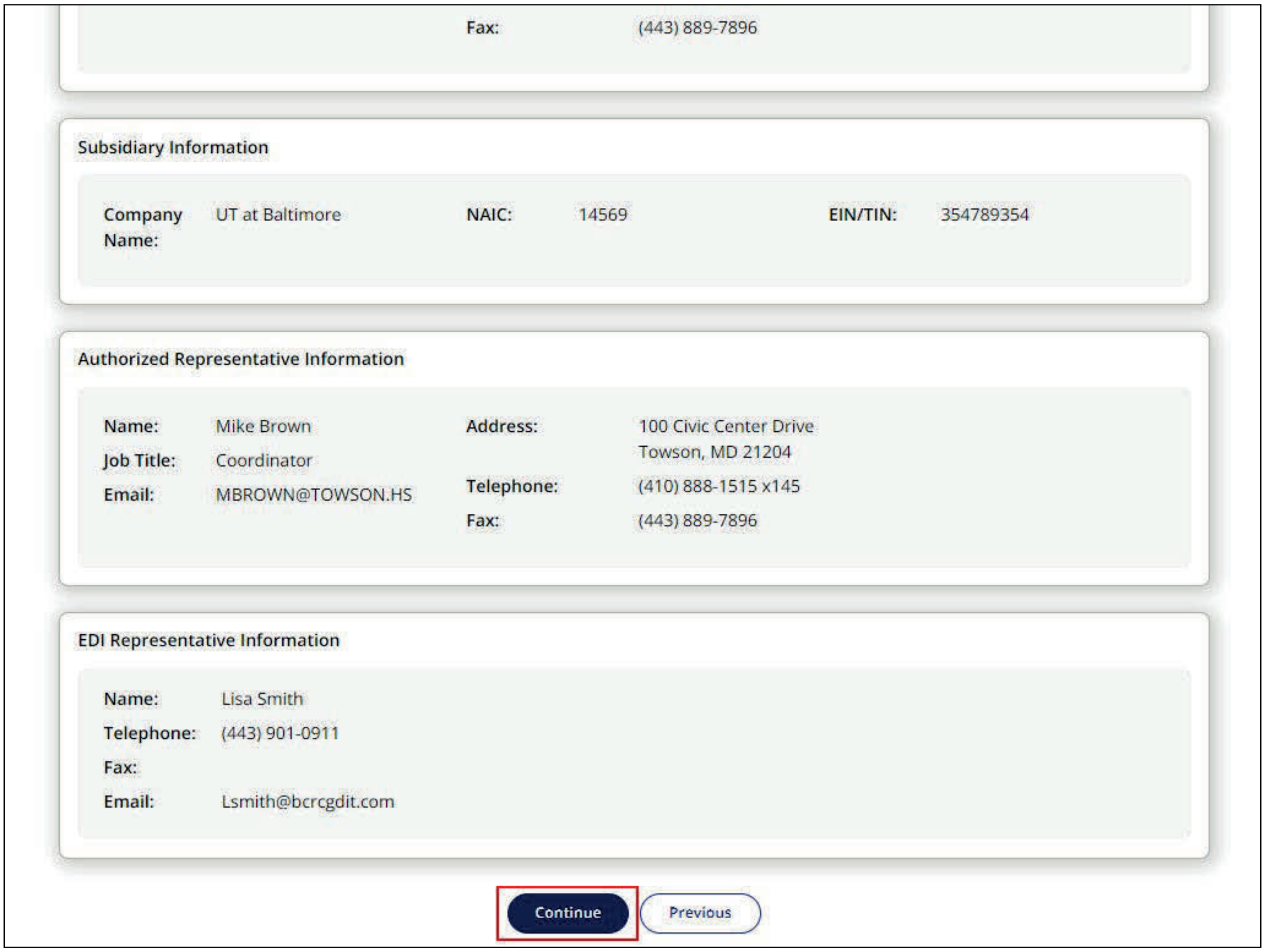
Slide 16 of 43 - Company Information



Slide notes

Once the Company Information page appears, review the information on the page.

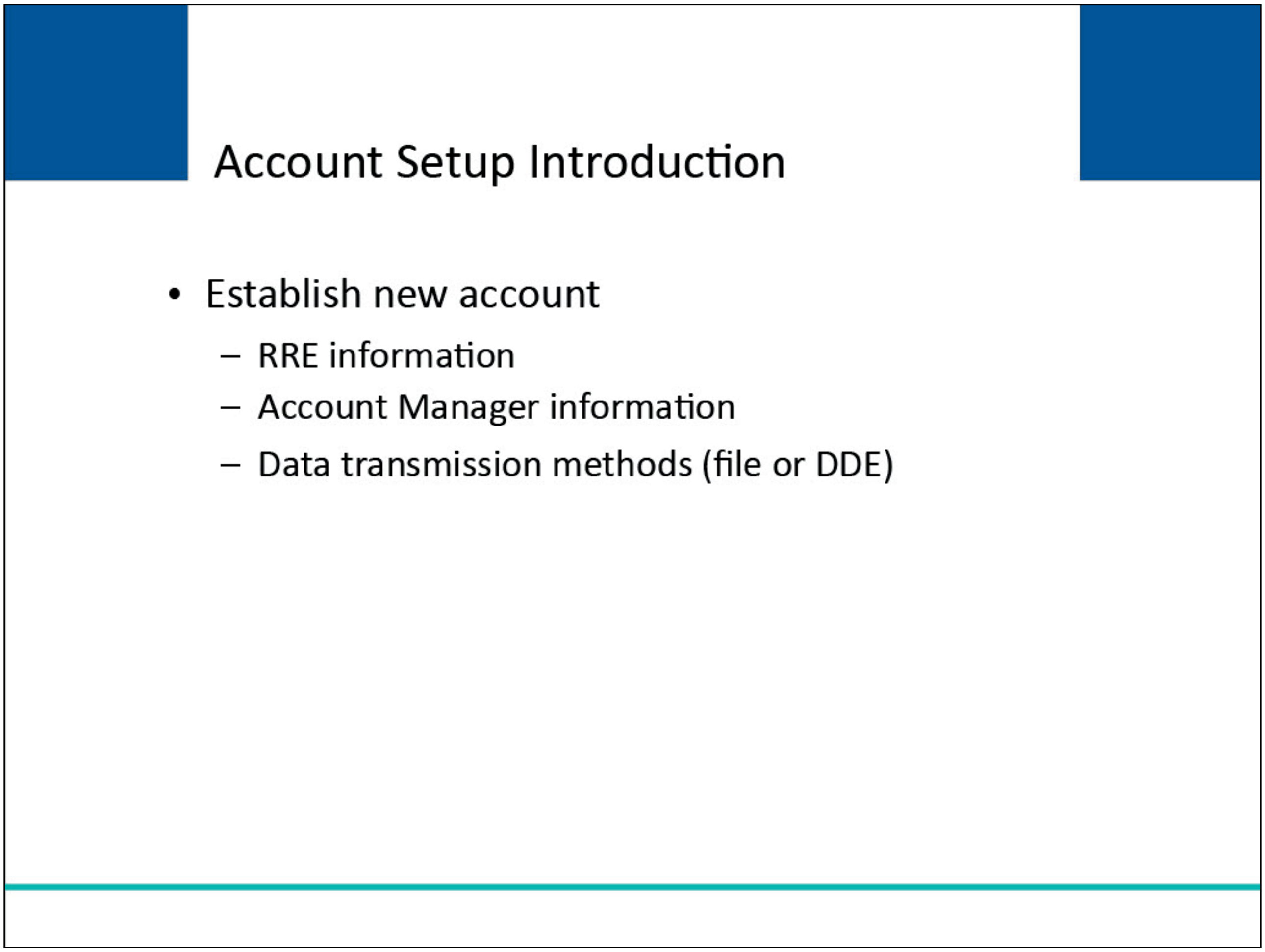
Slide 17 of 43 - Company Information Page



Slide notes

Once all information has been reviewed, click Continue at the bottom of the page.

Slide 18 of 43 - Account Setup Introduction

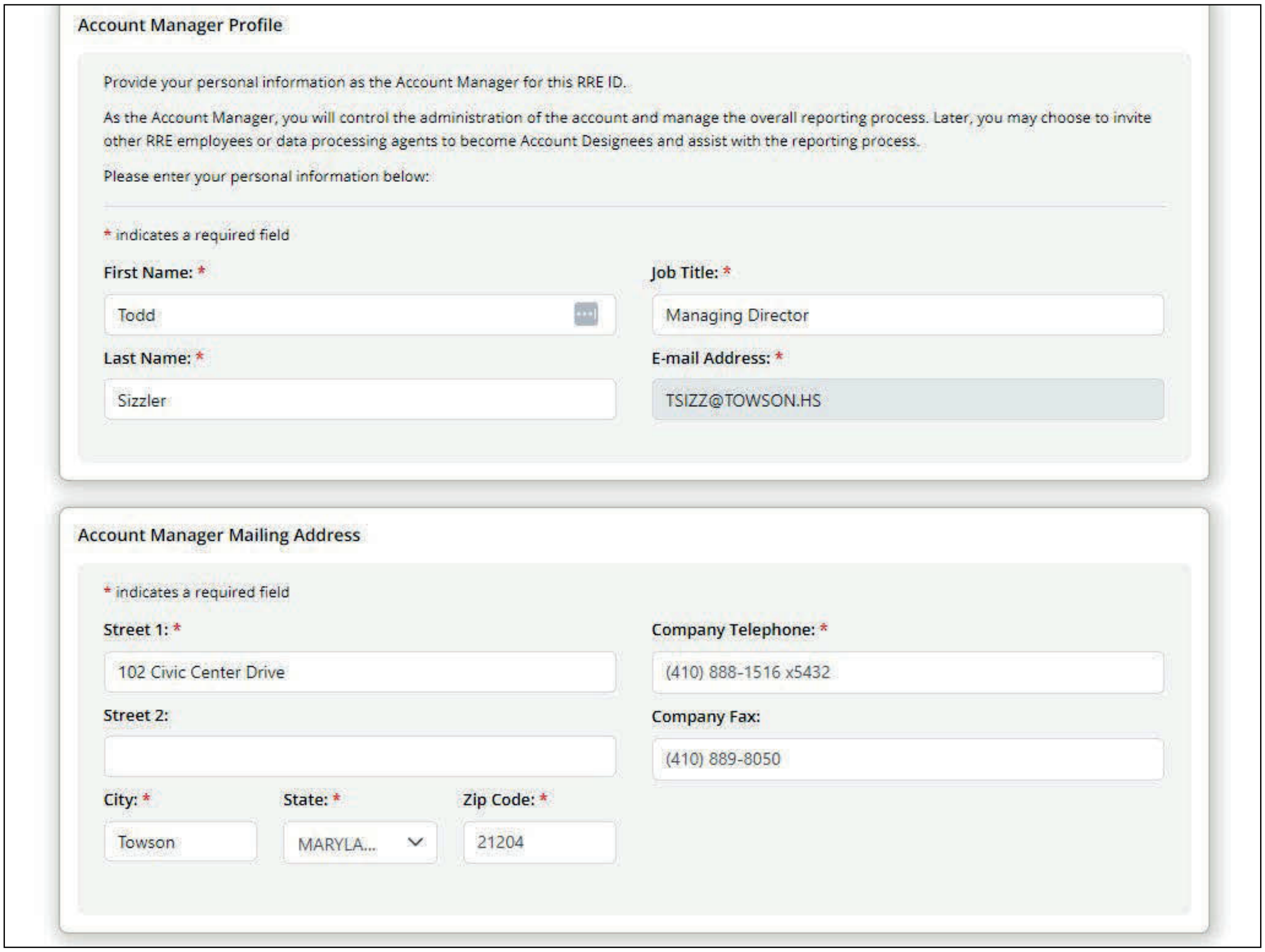


Slide notes

You will now go through the process of establishing a new account for the Section 111 COBSW.

The next few pages will collect basic information related to the RRE, the Account Manager associated with the RRE, and the data transmission methods (file or DDE).

Slide 19 of 43 - Account Manager Information

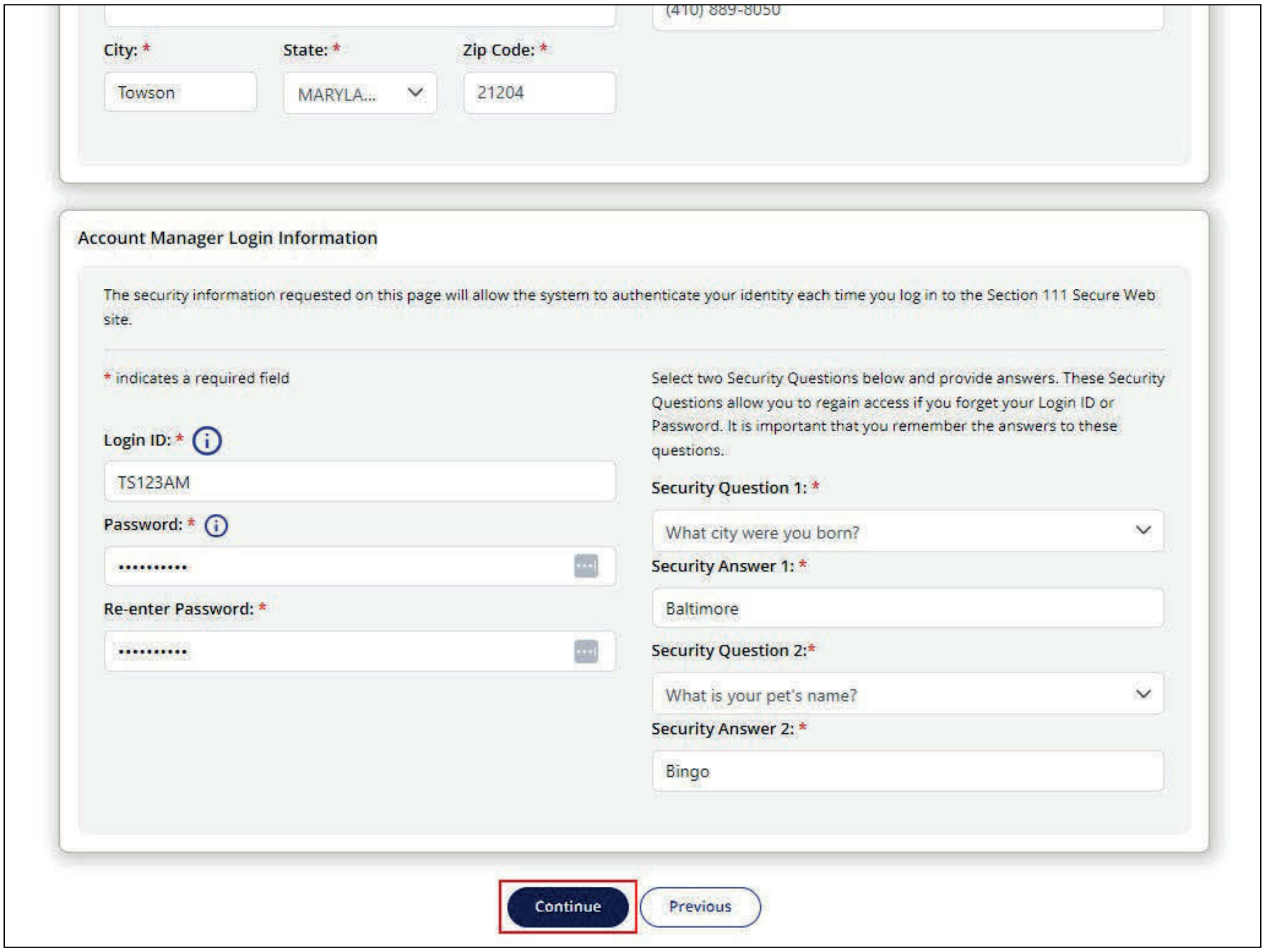


Slide notes

On the next page you will enter information about the Account Manager.

- Name: Name of the individual who controls the administration of the RRE's account and manages the overall reporting process.
- 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 the Account Manager. Email Address will be populated with the address that was entered on the Account Setup Introduction page.
- Address: Company or work mailing address of your Account Manager.
- Telephone: Company or work telephone number where your Account Manager can be reached.

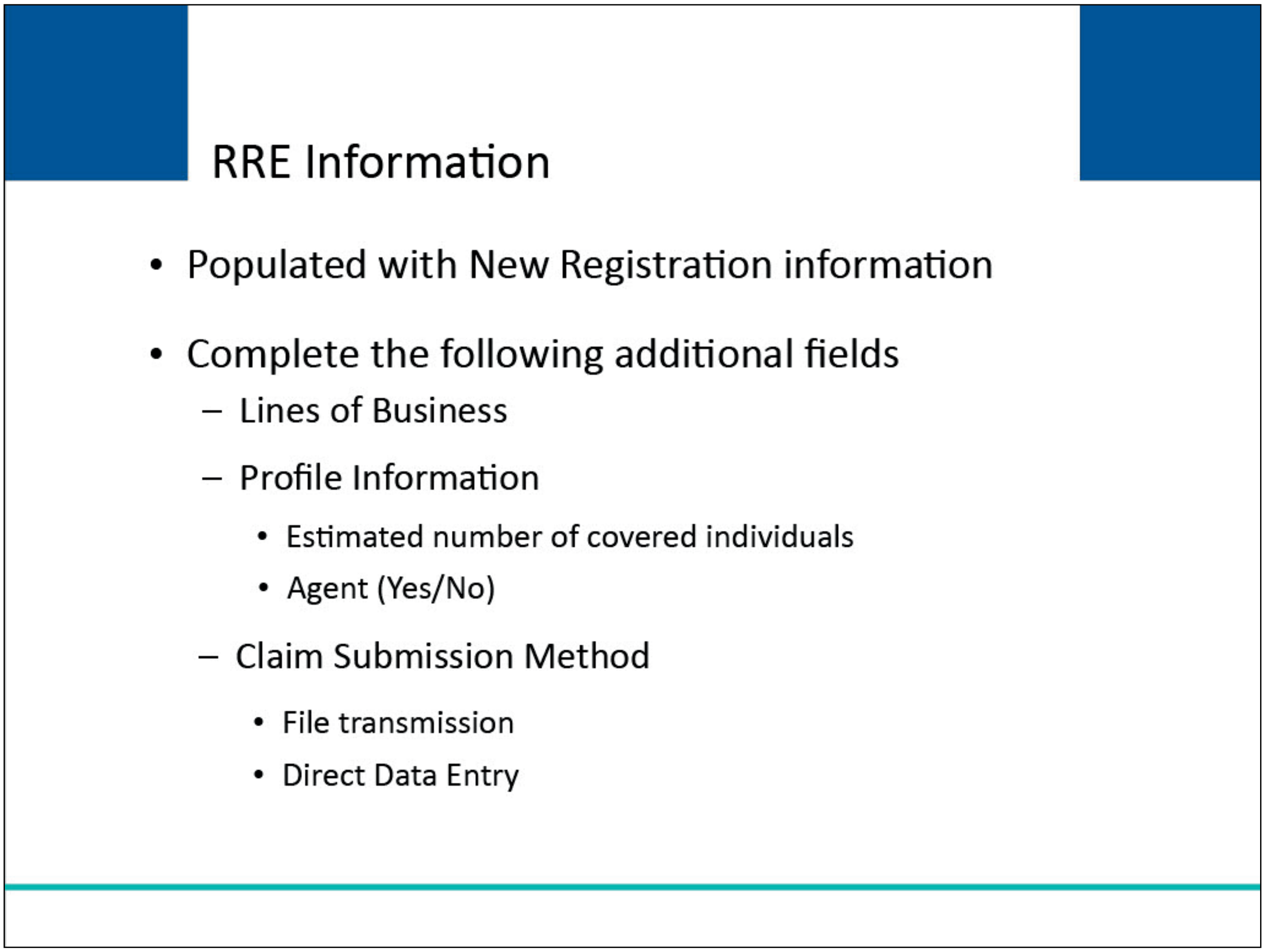
Slide 20 of 43 - Account Manager Login Information



Slide notes

On the bottom of the page in the Account Manager Login Information section, create your Login ID and Password. You will also select and answer two security questions. These questions will allow you to regain access if you forget your login and password later on. Click Continue once all information has been entered.

Slide 21 of 43 - RRE Information



Slide notes

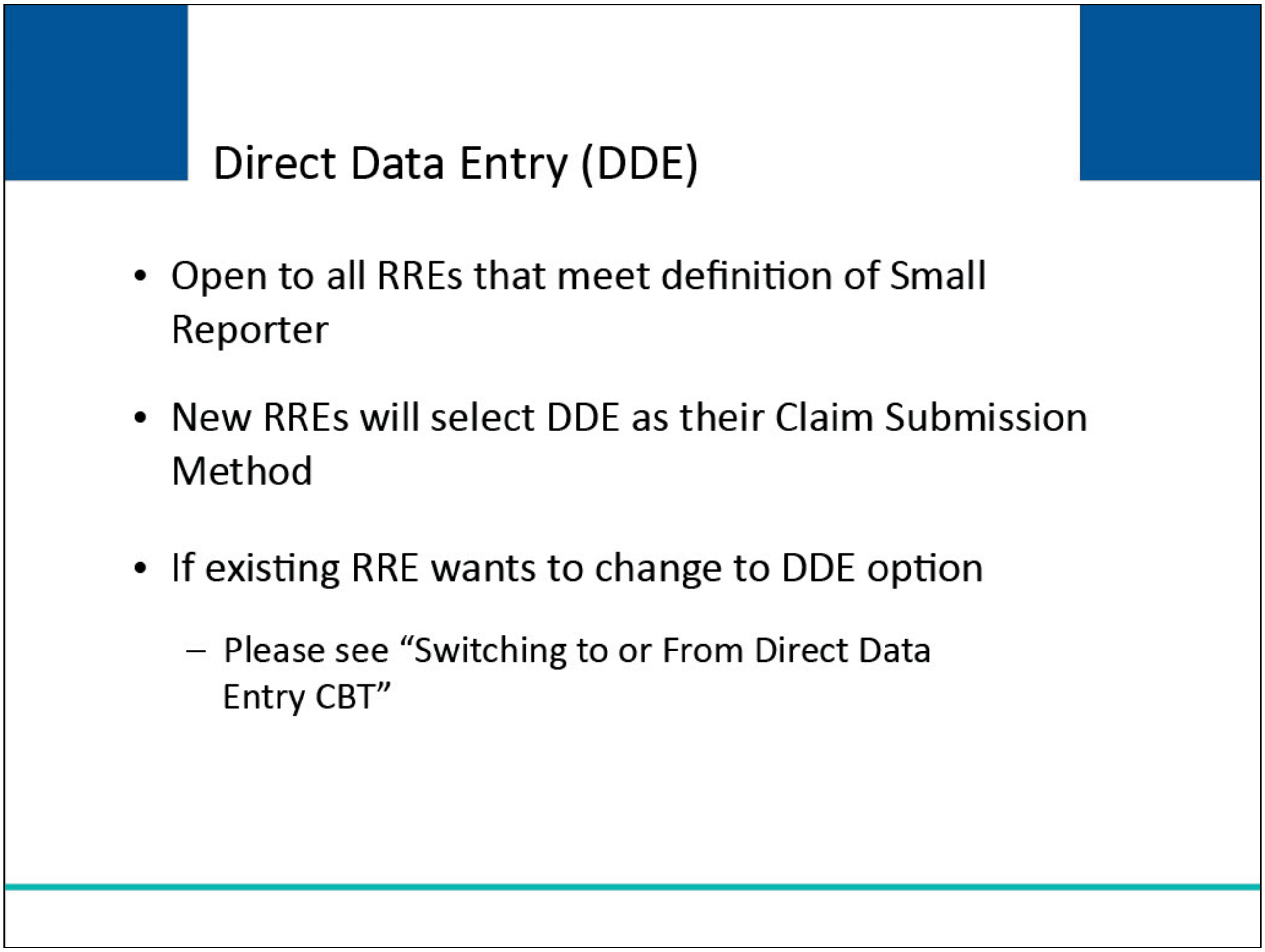
The page will be populated with the information that was submitted during Step 1- New Registration (company name and address).

There will also be additional fields that must be completed:

- insurer lines of business,
- profile information (including estimated number of paid claims per year, and whether your company will be using an agent to report along with the agent’s Employer Identification Number (EIN) or Tax ID Number (TIN)), and
- the Claim Submission Method (File transmission or Direct Data Entry).

Note: If you indicate that a reporting agent will be submitting data on your behalf, you will need to provide information about the Agent.

Slide 22 of 43 - Direct Data Entry (DDE)



Slide notes

The DDE option is open to all RREs that meet the definition of a Small Reporter. New RREs will select DDE as their claim submission method during the Account Setup process.

If an RRE has already registered under the current file transmission methods and wants to change to the DDE option, please see the "Switching to or From Direct Data Entry" CBT for more information.

Slide 23 of 43 - File Transmission Methods

File Transmission Methods

- Select file transmission methods for
  - Claim Input File
  - Query Only File
- File transmission method options
  - Connect:Direct via CMS EFT
  - SFTP
  - HTTPS
- If using HEW Software, select version

Slide notes

If the RRE ID Account you are setting up is for a file transmission process, you will be required to select the file transmission method you will be using for each file type you will be supplying.

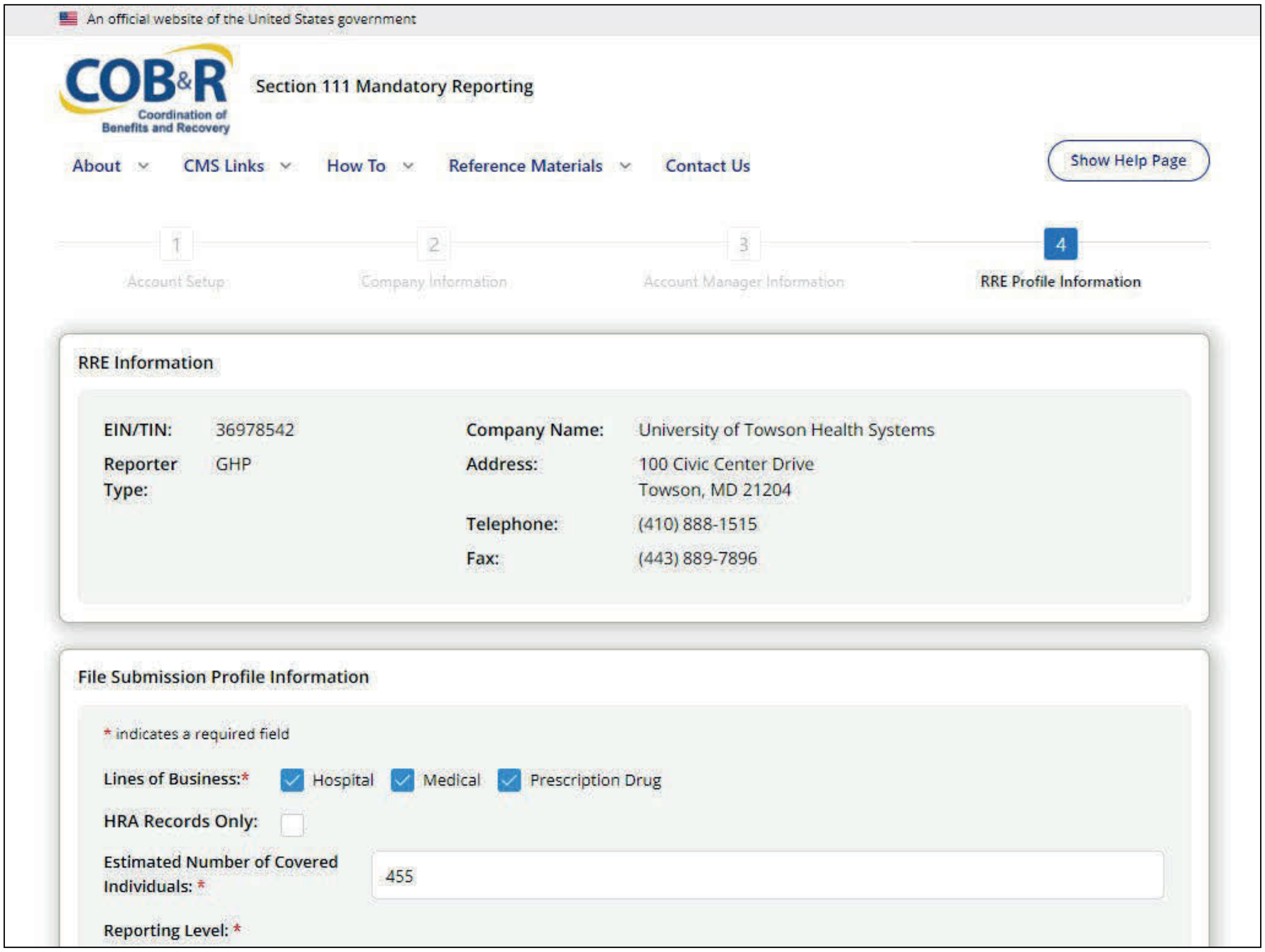
Liability/No-Fault/ Workers' Compensation reporters will supply information for the Claim Input and Query Only Files. There are three separate methods of data transmission:

- Connect:Direct via CMS EFT,
- Secure File Transfer Protocol (SFTP), or
- Hypertext Transfer Protocol over Secure Socket Layer (HTTPS).

The BCRC will return the response file to the RRE using the same transmission method that was chosen for the corresponding input file.

You will also need to supply information about the Health Insurance Portability and Accountability Act (HIPAA) Eligibility Wrapper (HEW) Software.

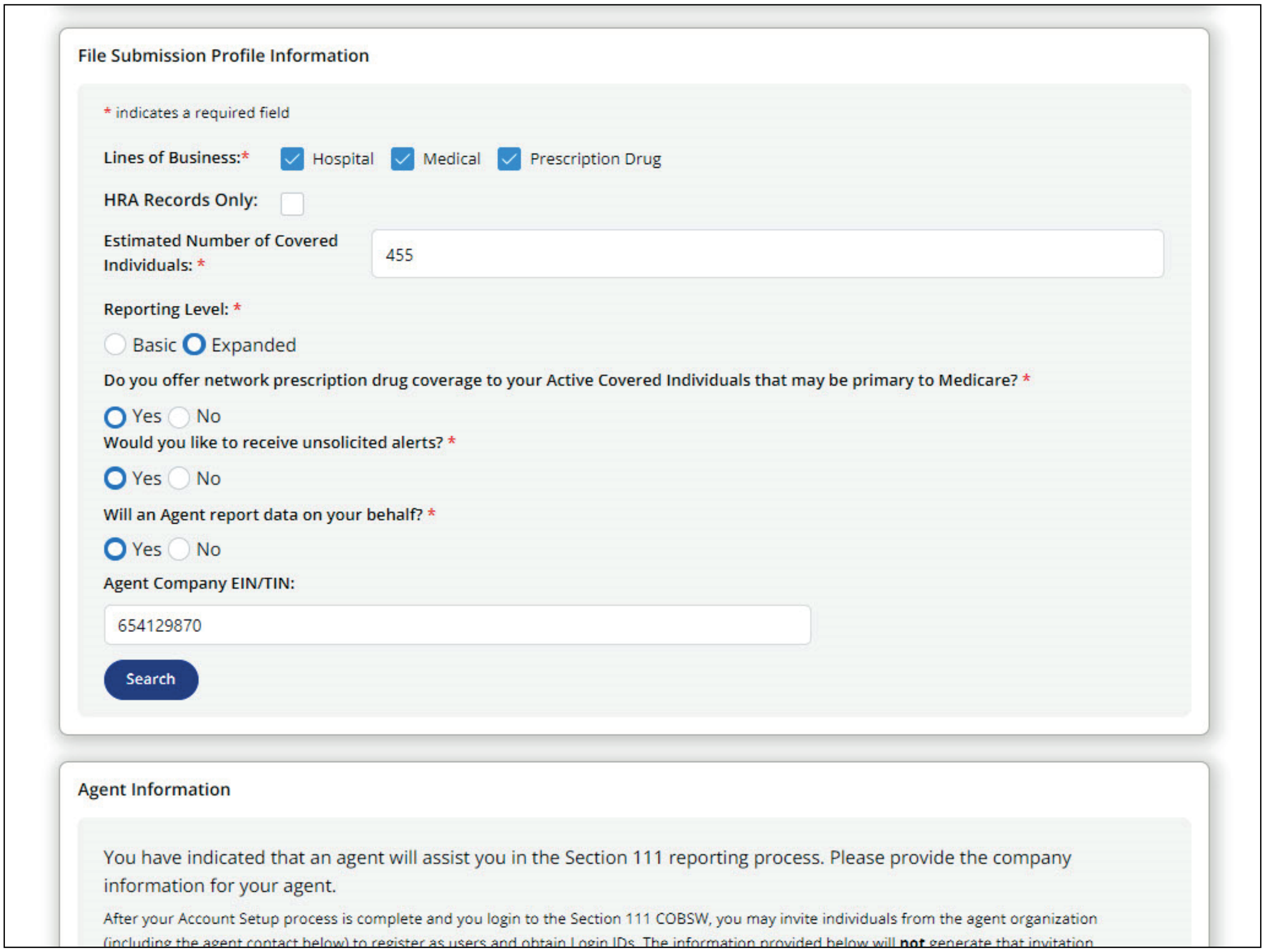
Slide 24 of 43 - RRE Profile Information Page



Slide notes

The RRE Profile Information page will appear. Here you will enter the File Submission Profile Information. Once the information has all been entered, use the scroll bar on the far right to scroll down the page.

Slide 25 of 43 - RRE Profile Information Page

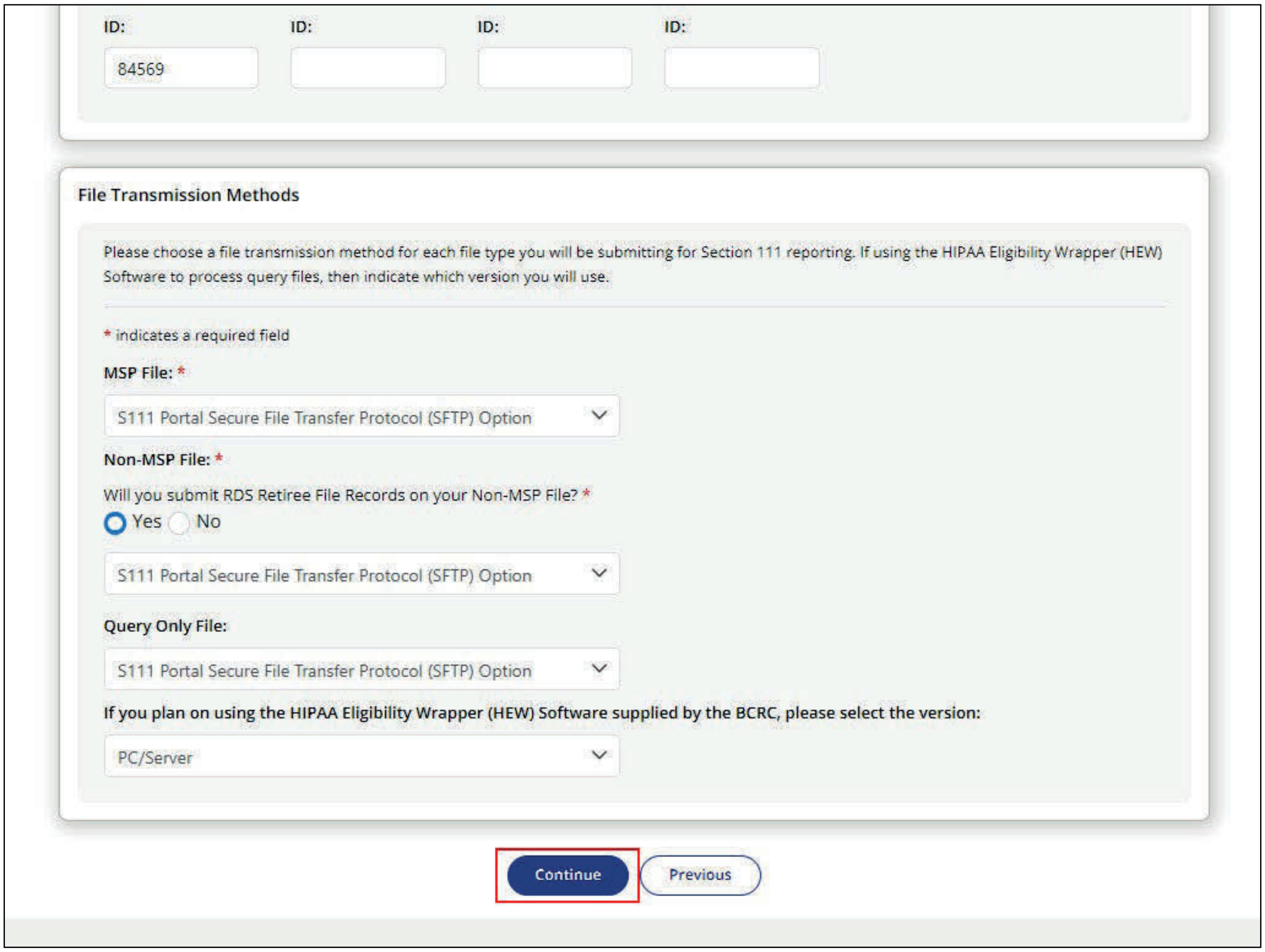


Slide notes

The Agent Information will appear as well as the RRE Profile Information and the File Transmission Methods. Enter all required information and use the scroll bar to continue down the page.

Note: The Agent Information section was updated to indicate when an account manager (AM) is required to manually enter an agent's information and which details must be provided (NGHP User Guide Section 5.3.1 and 5.3.2).

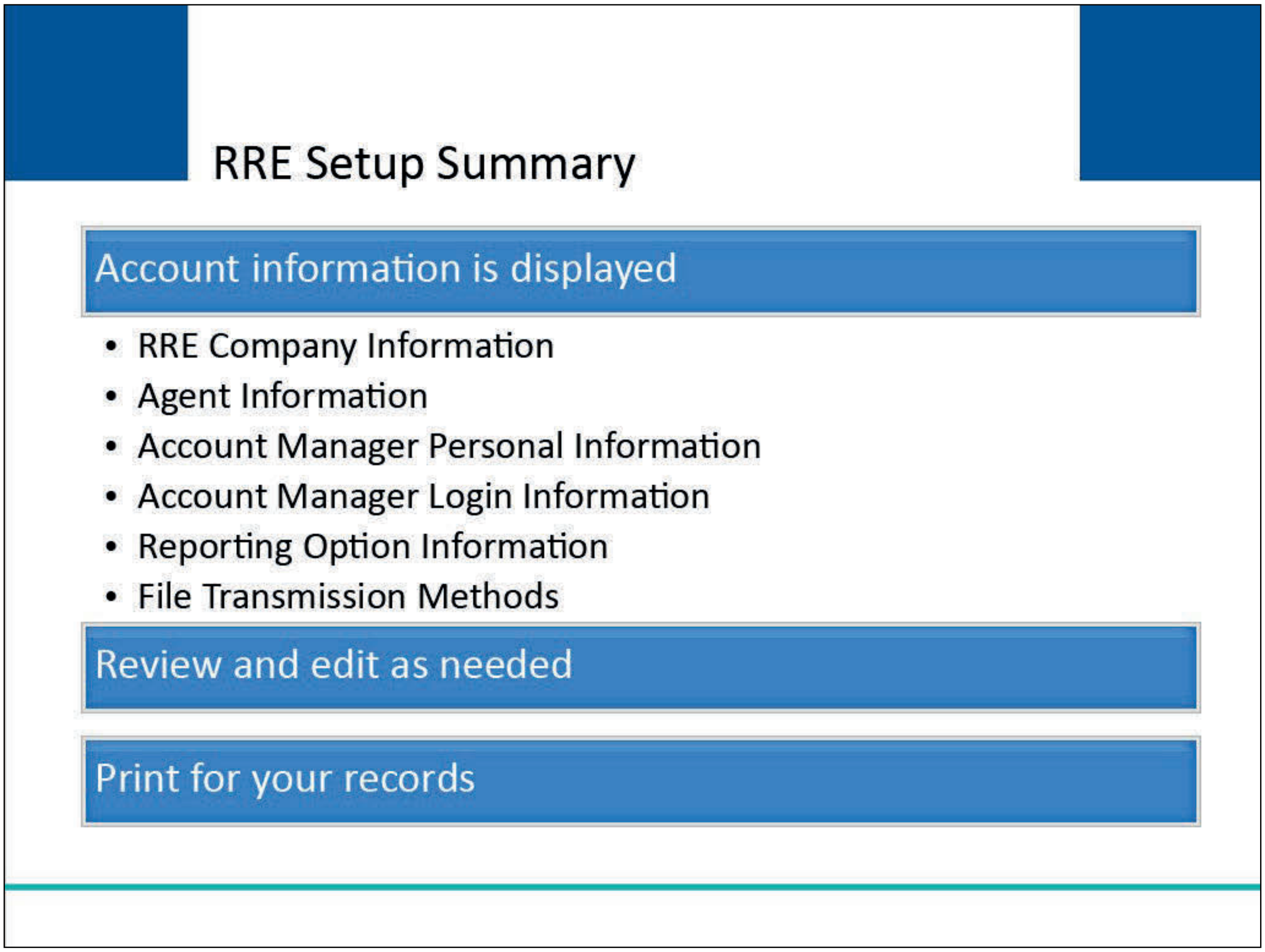
Slide 26 of 43 - RRE Profile Information Page



Slide notes

Finally, the File Transmission Methods section will appear. Once all information has been entered and selected, click Continue.

Slide 27 of 43 - RRE Setup Summary

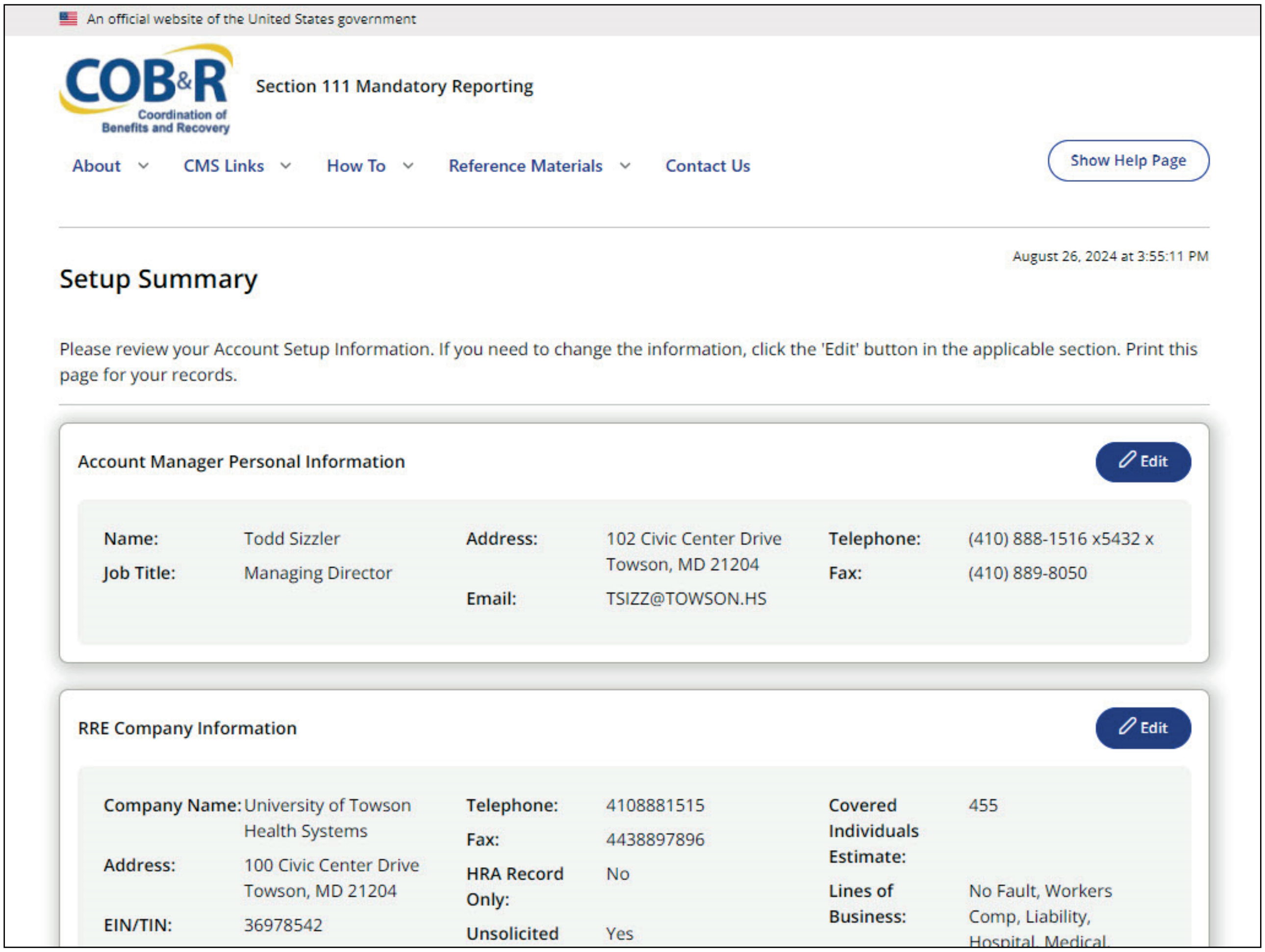


Slide notes

After you have completed the required RRE Company, Agent, Account Manager, and file transmission method information, the 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 for your records.

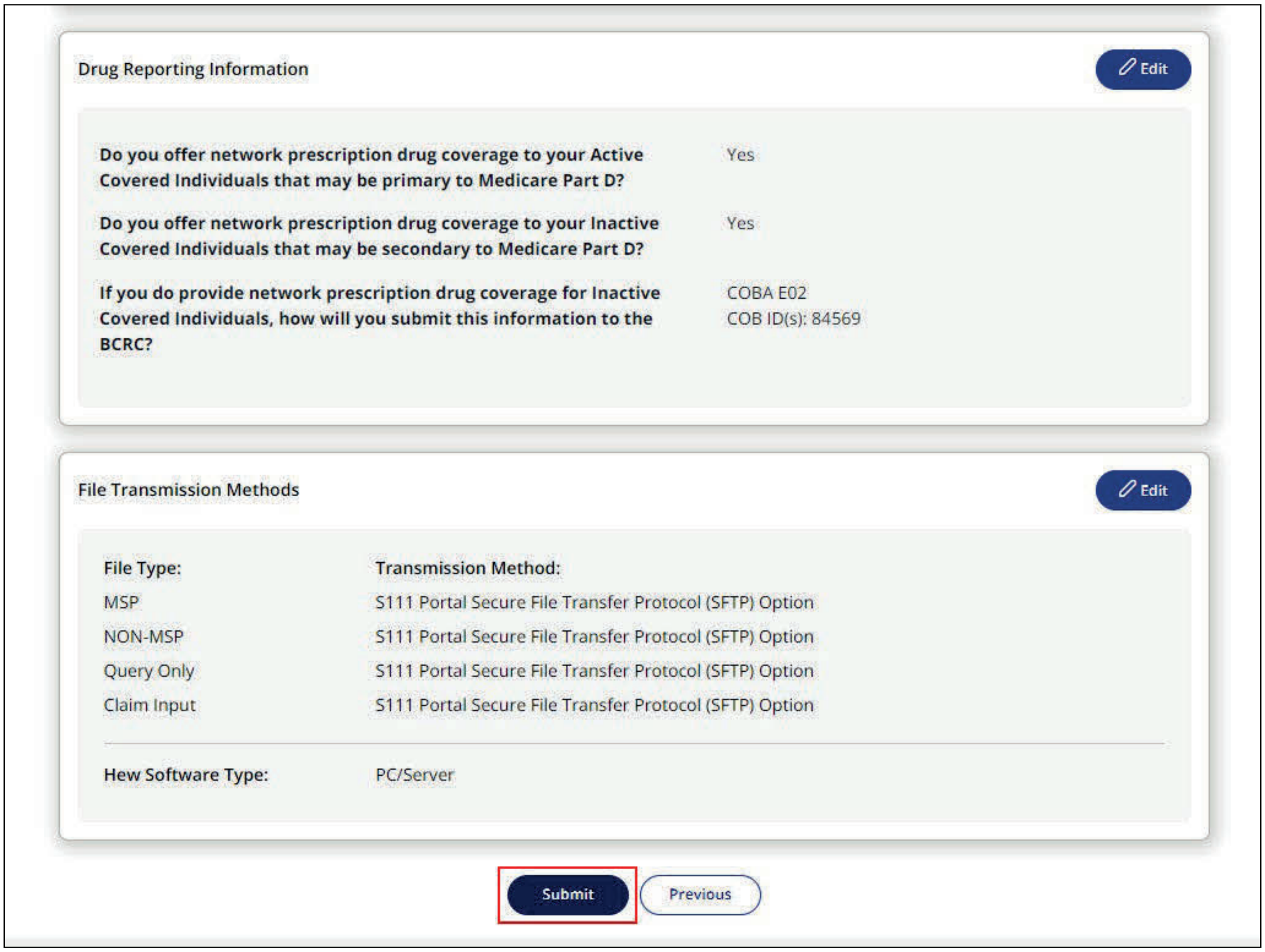
Slide 28 of 43 - Setup Summary Page



Slide notes

The Setup Summary page will appear. Verify all information is correct. If any information is incorrect, use the edit buttons on the right side of page to return to that section and make corrections.

Slide 29 of 43 - Setup Summary Page



Slide notes

Once all information is correct, click Submit.

Slide 30 of 43 - Confirmation Pop-up

Confirmation Pop-up

- Displayed after successful completion of account setup
- Contains RRE ID and EDI Representative information
- Details on next steps
- Print for your records

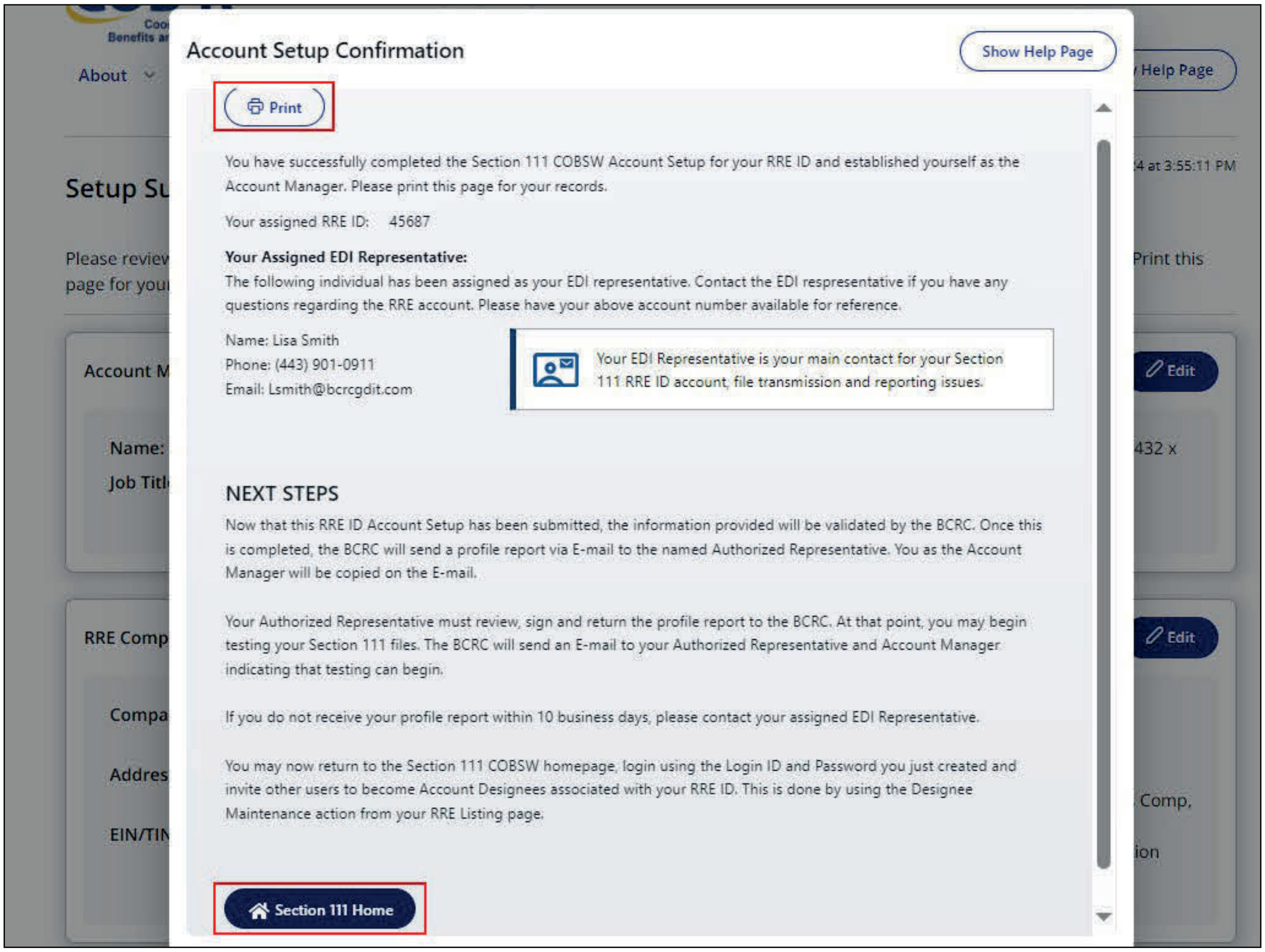
Slide notes

After you have successfully completed the Account Setup for the MMSEA Section 111 COBSW, an “Account Setup Confirmation” pop-up 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, file transmission, and reporting issues.

Details on what steps to take next are also provided on this page. Please print this page for your records.

Slide 31 of 43 - Account Setup Confirmation Pop-up



Slide notes

The Account Setup Confirmation pop up box will appear. You have successfully completed the Section 111 COBSW Account Setup for your RRE ID and established yourself as the Account Manager.

You can print this page for your records using the Print button on the top left-hand corner of the pop up box.

Use the Section 111 Home button to return to the Welcome/Sign In page.

Slide 32 of 43 - Important Information to Consider

Important Information to Consider

- Acccount Setup
  - Must be completed by Account Manager
  - May not be completed by Authorized Representative
- If Authorized Representative's information is entered by mistake
  - Stop
  - Do not complete Account Setup
  - Contact EDI Department and get information corrected

Slide notes

This page confirms that you completed Step 2, Account Setup (NGHP), in the Section 111 registration process.

Click the Login button to return to the Section 111 COBSW Home page and login as a user.

Click Exit to exit the Section 111 COBSW.

Slide 33 of 43 - Next Steps

Next Steps

- Profile Report sent to Authorized Representative
  - Registration and Account Setup summary information
  - RRE ID
  - EDI Representative contact information
- If you are using a File Transmission Method to submit claims
  - Data file transmission information
  - Production live date and ongoing quarterly file submission timeframe for Claim Input File
- Review, sign, and return Profile Report to the BCRC

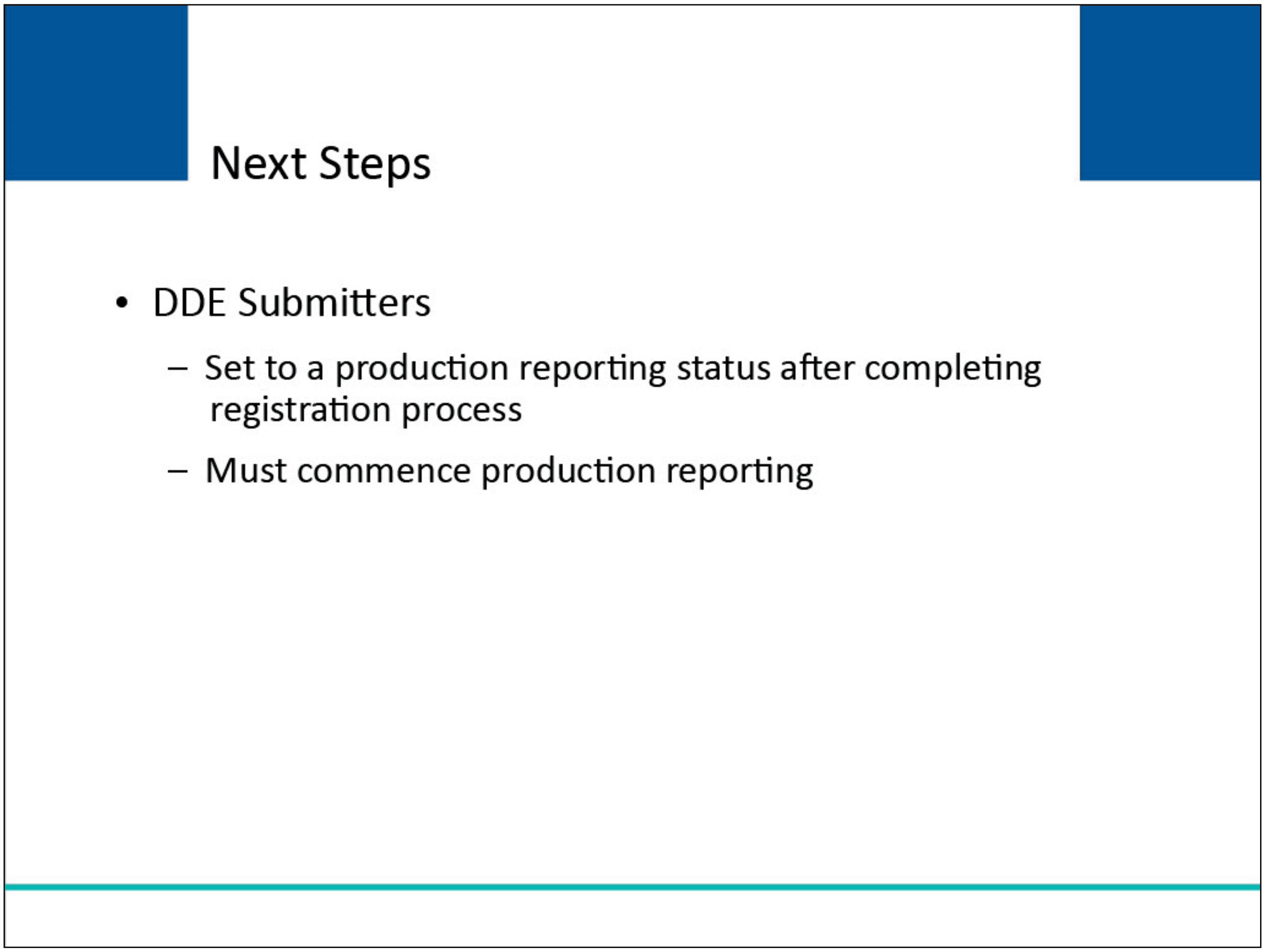
Slide notes

Once the Account Setup has been completed on the Section 111 COBSW and processed by the BCRC, a profile report will be sent to your Authorized Representative via email.

The Profile Report contains registration and account set up summary information, RRE ID, and EDI Representative contact information. If you are using a file transmission method to submit your claims, your profile report will also contain data file transmission information and assigned production live date and ongoing quarterly file submission timeframe for the Claim Input File.

Your Authorized Representative must review, sign, and return the profile report to the BCRC.

Slide 34 of 43 - Next Steps



Slide notes

Those RREs registering for DDE will be set to a production reporting status immediately after completing the registration process and must commence production reporting of applicable claims on the Section 111 COBSW.

Slide 35 of 43 - Next Steps

Next Steps

- File Submitters
  - May begin testing after the BCRC has received their signed profile report
  - RRE ID
    - Status will be updated by the system as each registration step is completed
      - Placed in Testing status once BCRC receives signed profile report
      - Placed in Production status once testing is completed
    - Expected to move to Production status within 180 days after completion of New Registration step

Slide notes

RREs who have not registered for DDE, may begin testing after the signed profile report has been received by the BCRC.

The status of your RRE ID will be updated by the system as each step of the registration process is completed.

Once the BCRC receives your signed profile report, your RRE ID will be placed in a Testing status. Once testing is completed, your RRE ID will be placed in a Production status.

RRE IDs are expected to move to a Production status within 180 days after initiation of the registration process (completion of the New Registration step).

Slide 36 of 43 - Next Steps

Next Steps

- Login to account
  - Maintain RRE information
  - Monitor file processing
  - Review prior file processing results
  - Upload/download files via HTTPS/SFTP (RREs that have selected a file transmission method)
  - Submit and view claim information directly on the Section 111 COBSW (RREs that have selected DDE)

Slide notes

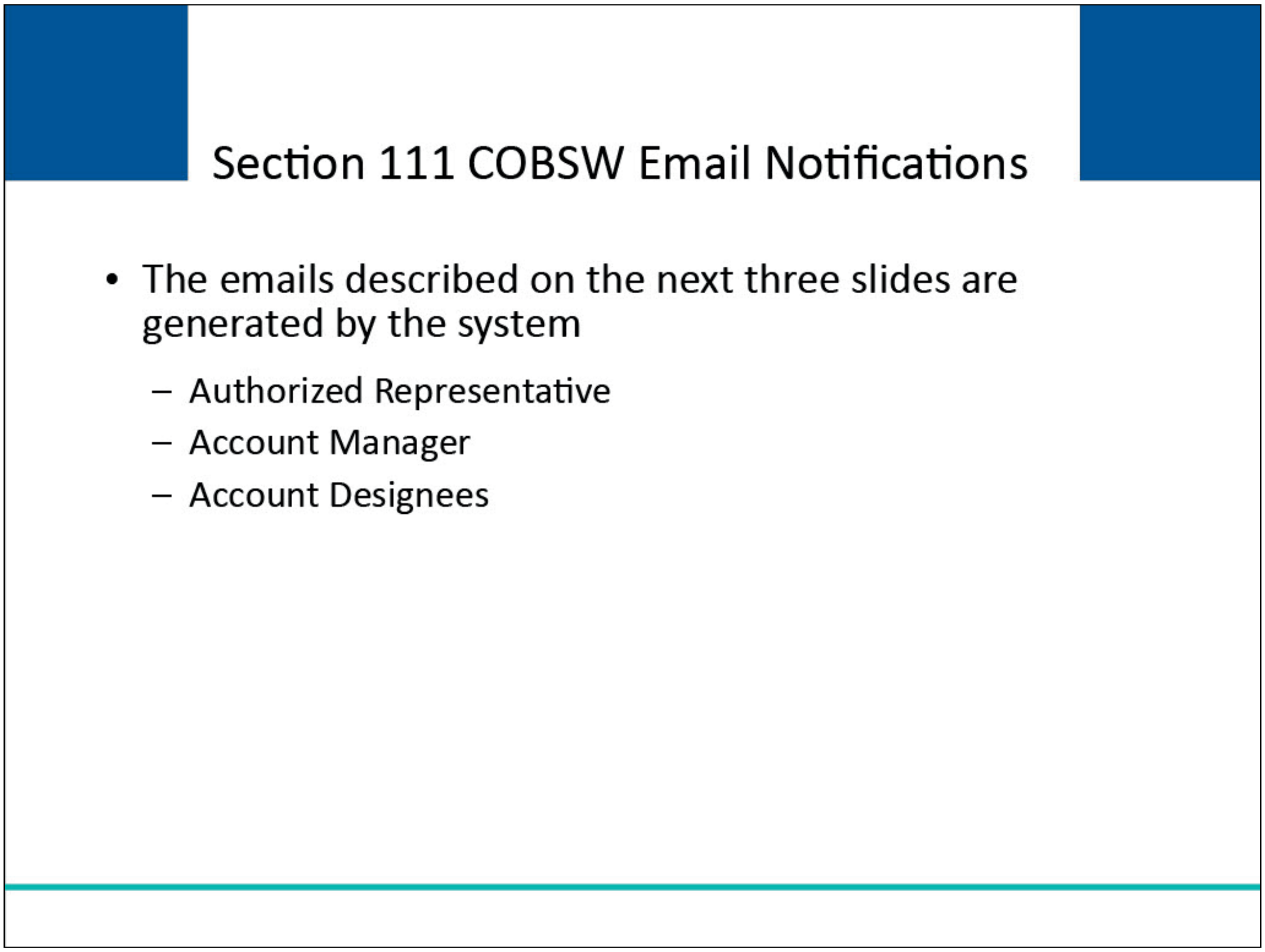
After you complete Account Setup and the BCRC has processed your profile report, you will be able to login to your account.

When you login to the account, you will be able to maintain RRE information (Name, Address, Contact Information), monitor file processing and review prior file processing results.

RREs that have selected a file transmission method will also be able to upload and download files via HTTPS/SFTP. RREs that have selected DDE will be able to submit and view claim information directly on the Section 111 COBSW.

Because file types have been restricted for uploads, RREs using the HTTPS file transmission method can only upload files with the file extension of .txt. Any other file type will generate an Invalid File error message.

Slide 37 of 43 - Section 111 COBSW Email Notifications



Slide notes

The emails described on the next three slides are generated by the system to the Authorized Representative, Account Manager, and/or Account Designees for the RRE ID.

Slide 38 of 43 - Section 111 COBSW Email Notifications

Section 111 COBSW Email Notifications

Email Notifications	Recipient	Purpose
Profile Report	Authorized Representative, Account Manager	Sent after Account Setup step is complete on the Section 111 COBSW. Included attachment with Profile Report. Profile report must be signed by the RRE's Authorized Representative and returned to the BCRC.
Non-Receipt of Signed Profile Report	Authorized Representative, Account Manager	Generated 30 days after the Profile Report email if a signed copy of the profile report has not been received at the BCRC. The Authorized Representative for the RRE ID must sign and return the profile report. If another copy is needed, contact your EDI Representative.
Successful File Receipt	Account Manager	Sent after input file has been successfully received at the BCRC. Informational only. No action required.
Late File Submission	Authorized Representative, Account Manager	Sent 7 days after the end of the file submission period if no Claim Input File was received for the RRE ID. Send file immediately and contact your EDI Representative. This email may be ignored if you have nothing to report for the quarter.

Slide notes

The following emails are generated by the system to the Authorized Representative, Account Manager, and/or Account Designees for the RRE ID.

- Profile Report - Authorized Representative, Account Manager. Sent after Account Setup step is complete on the Section 111 COBSW. Included attachment with Profile Report.
  - Profile report must be signed by the Responsible Reporting Entity's Authorized Representative and returned to the BCRC.
- Non-Receipt of Signed Profile Report - Authorized Representative, Account Manager. Generated 30 days after the Profile Report email if a signed copy of the profile report has not been received at the BCRC.
  - The Authorized Representative for the RRE ID must sign and return the profile report. If another copy is needed, contact your EDI Representative.
- Successful File Receipt - Account Manager. Sent after input file has been successfully received at the BCRC. Informational only. No action required.

- Late File Submission - Authorized Representative, Account Manager. Sent 7 days after the end of the file submission period if no Claim Input File was received for the RRE ID. Send file immediately and contact your EDI Representative.
    - This email may be ignored if you have nothing to report for the quarter.

Slide 39 of 43 - Section 111 COBSW Email Notifications

Section 111 COBSW Email Notifications

Email Notifications	Recipient	Purpose
Threshold Error	Account Manager	Sent when an input file has been suspended for a threshold error. Contact your EDI Representative to resolve.
Severe Error	Account Manager	Sent when an input file has been suspended for a severe error. Contact your EDI Representative to resolve.
Ready for Testing	Account Manager	Account setup is complete and the signed profile report has been received at the BCRC. The RRE may begin testing.
Ready for Production	Account Manager	Testing requirements have been met and production files will now be accepted for the RRE ID.
Successful File Processed	Account Manager	The BCRC has completed processing on an input file and the response file is available.

Slide notes

- Threshold Error - Account Manager. Sent when an input file has been suspended for a threshold error. Contact your EDI Representative to resolve.
- Severe Error - Account Manager - Sent when an input file has been suspended for a severe error. Contact your EDI Representative to resolve.
- Ready for Testing - Account Manager. Account setup is complete, and the signed profile report has been received at the BCRC. The RRE may begin testing.
- Ready for Production - Account Manager. Testing requirements have been met and production files will now be accepted for the RRE ID.
- Successful File Processed - Account Manager. The BCRC has completed processing on an input file and the response file is available.

Slide 40 of 43 - Section 111 COBSW Email Notifications

Section 111 COBSW Email Notifications

Email Notifications	Recipient	Purpose
Account Designee Invitation	Account Designee	Sent an Account Designee after the Account Manager for the RRE ID adds the Account Designee to the RRE ID on the Section 111 COBSW. If the Account Designee is a new user, the email will contain a URL with a secure token link for the user to follow to obtain a login ID for the Section 111 COBSW.
Personal Information Changed	User Affected (Account Manager or Account Designee)	Generated after a user changes his/her personal information on the Section 111 COBSW. Informational only.
Password Reset	User Affected (Account Manager or Account Designee)	Generated when a user's Password is reset on the Section 111 COBSW.
Login ID Request	User Affected (Account Manager or Account Designee)	Generated after a user completes the "Forgot Login ID" function on the Section 111 COBSW.

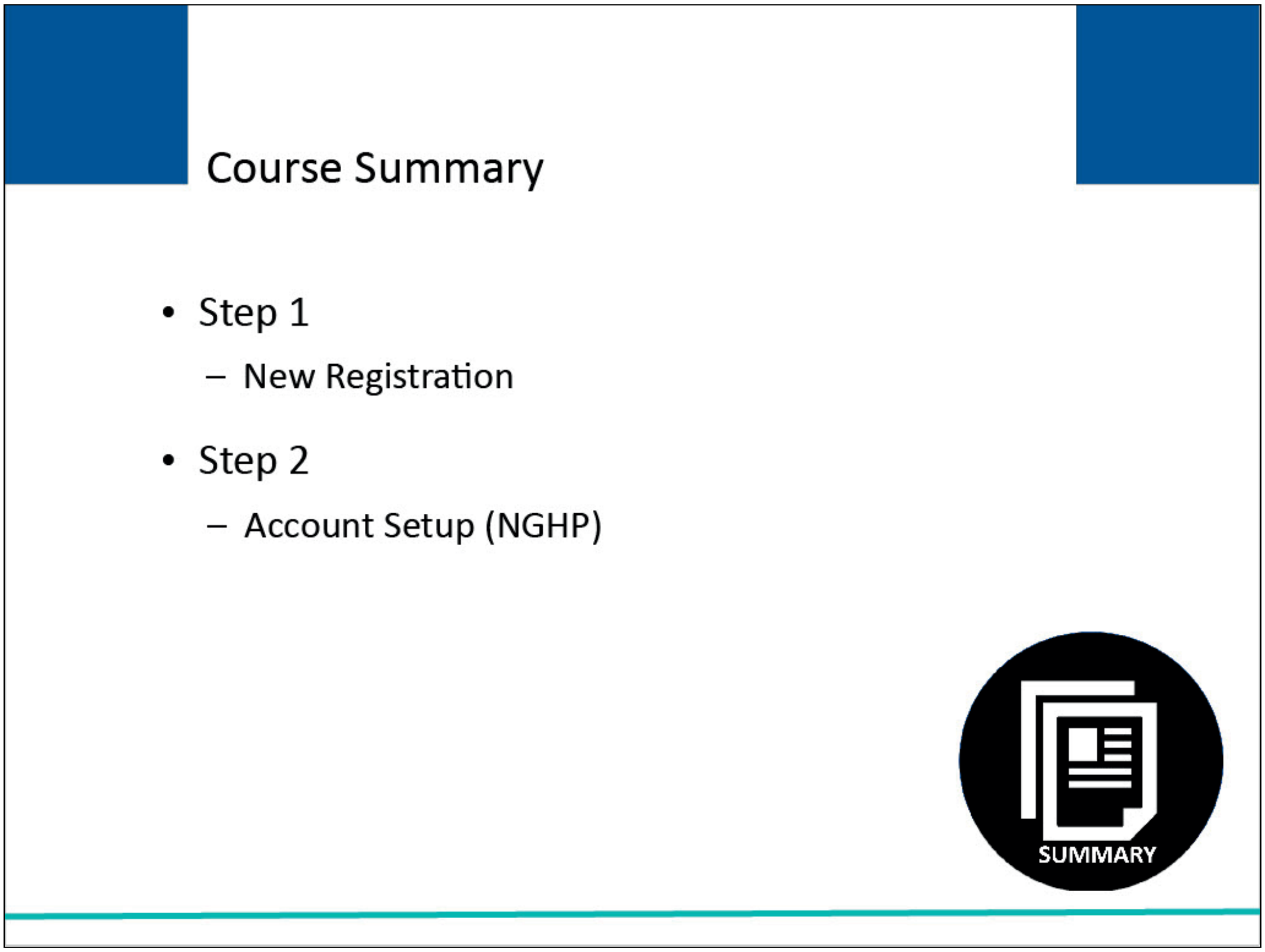
Slide notes

Account Designee Invitation - Account Designee. Sent an Account Designee after the Account Manager for the RRE ID adds the Account Designee to the RRE ID on the Section 111 COBSW.

If the Account Designee is a new user, the email will contain a URL with a secure token link for the user to follow to obtain a login ID for the Section 111 COBSW.

- Personal Information Changed - User Affected (Account Manager or Account Designee). Generated after a user changes his/her personal information on the Section 111 COBSW. Informational only.
- Password Reset - User Affected (Account Manager or Account Designee). Generated when a user's Password is reset on the Section 111 COBSW.
- Login ID Request - User Affected (Account Manager or Account Designee). Generated after a user completes the "Forgot Login ID" function on the Section 111 COBSW.

Slide 41 of 43 - Course Summary



Slide notes

This course covered Step 2 - Account Setup (NGHP) on the Section 111 COBSW.

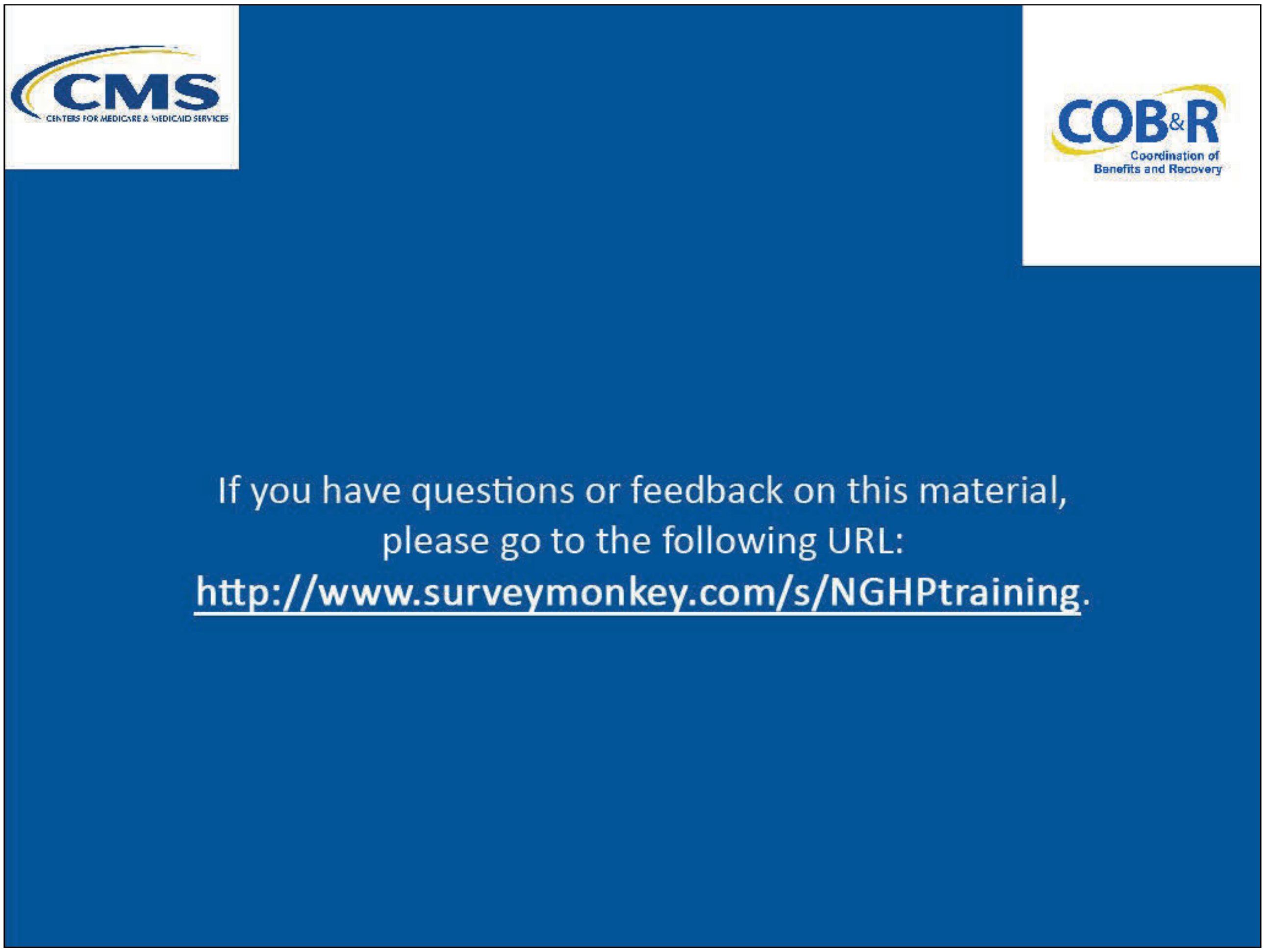
Slide 42 of 43 - Conclusion

Slide notes

You have completed the Step 2 - Account Setup (NGHP) 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 43 of 43 - NGHP Training Survey



Slide notes

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