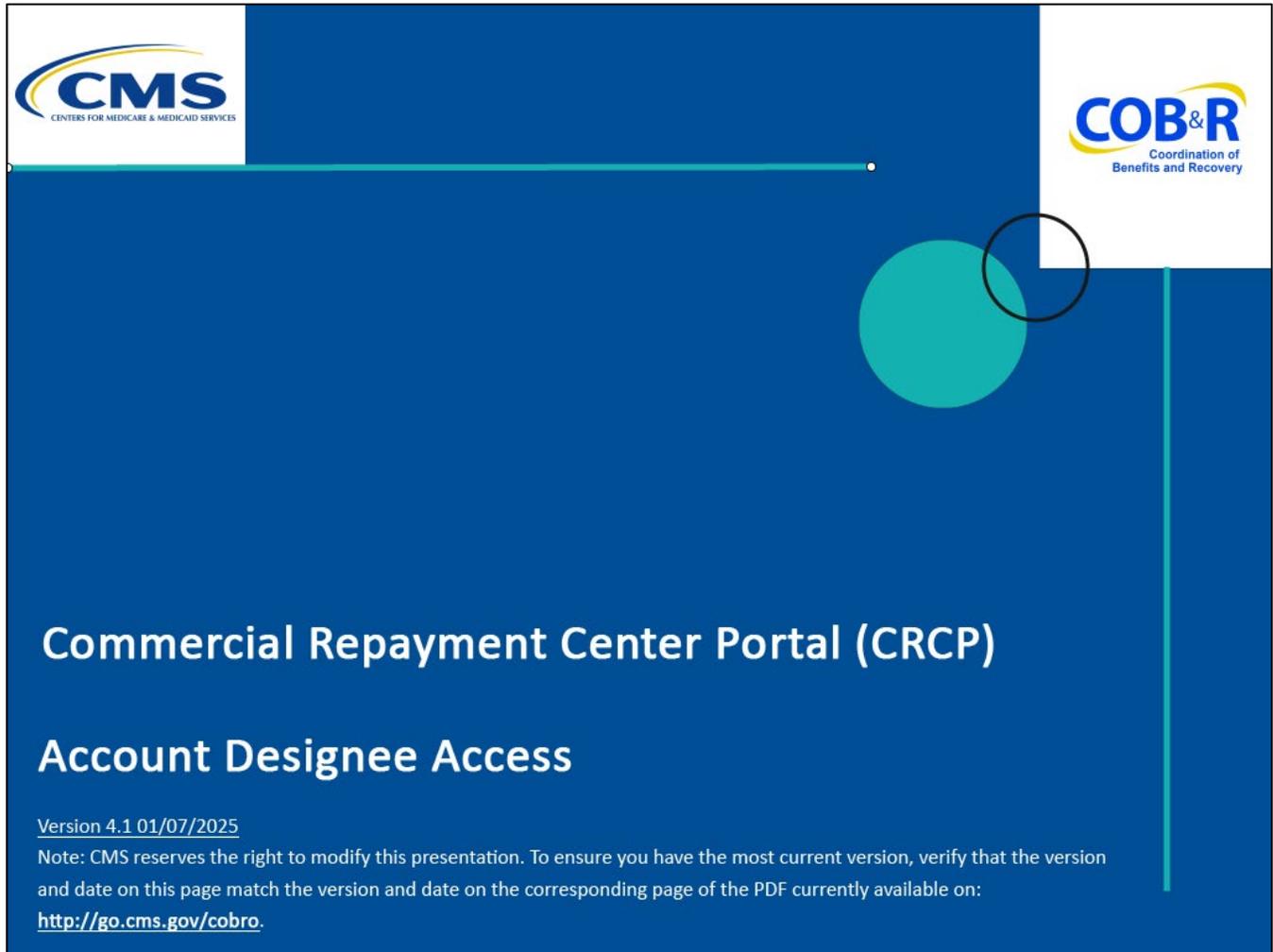


## Account Designee Access

Slide 1 - of 22 - Account Designee Access



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). A large teal circle is positioned on the right side of the slide, with a thin black circle overlapping its right edge. A thin teal horizontal line is located just below the logos, and a thin teal vertical line is on the right side of the slide.

# Commercial Repayment Center Portal (CRCP)

## Account Designee Access

Version 4.1 01/07/2025

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

### Slide notes

Welcome to the Commercial Repayment Center Portal (CRCP) Account Designee Access course.

**Slide 2 of 22 - 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 in the CRCP User Guide found under the *Reference Materials* menu at the following link:  
<https://www.cob.cms.hhs.gov/CRCP/>.

**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 in the CRCP User Guide found under the Reference Materials menu at the following link: [CMS CRCP Website](https://www.cob.cms.hhs.gov/CRCP/).

**Slide 3 of 22 - Course Overview**

## Course Overview

- Account Designee Registration
  - Setting up a Login ID and Password
- CRCP Functions of the Account Designee



**Slide notes**

This course will explain the basic registration process a new user will follow to become an Account Designee, (i.e., how you will set up your Login ID and Password) and the basic CRCP functions you will have access to once registered.

Slide 4 of 22 - Account Designee

The slide features a white background with two blue rectangular accents in the top-left and top-right corners. The title "Account Designee" is centered at the top. Below the title is a large, light-green rounded rectangle containing three smaller rounded rectangles. The top one is titled "Assist Account Manager with CRCP account" and contains two sub-items: "Track GHP recovery cases" and "Submit documented defenses".

## Account Designee

- Assist Account Manager with CRCP account
  - Track GHP recovery cases
  - Submit documented defenses

**Slide notes**

The CRCP Account Manager invites Account Designees to assist with the case recovery process on the CRCP. This includes tracking Group Health Plan (GHP) cases and submitting documented defenses.

## Slide 5 of 22 - Invitation Email

## Invitation Email

**From:** [DcNotReply@cob.cms.hhs.gov](mailto:DoNotReply@cob.cms.hhs.gov) [mailto:DoNotReply@cob.cms.hhs.gov]  
**Sent:** Tuesday, July 22, 2014 10:09 AM  
**To:** [REDACTED]  
**Cc:** [REDACTED]  
**Subject:** Designee Invitation

\*\*\* PLEASE DO NOT REPLY TO THIS EMAIL \*\*\*

Dear [REDACTED]:

You have been invited by: [REDACTED], for Account ID: [REDACTED], to participate in the Commercial Repayment Center Portal (CRCP) web portal process. Please follow this link to register:  
<https://qua.cob.cms.hhs.gov/CRCP/designeeRegistration?token=Et1qwZibMNZtFl>. If you have already registered, please visit the Commercial Repayment Center Portal Welcome Page at <https://cob.cms.hhs.gov/CRCP> to login.

For any questions or problems please contact the person named in the paragraph above.

This electronic message transmission is intended only for the person or entity to which it is addressed and may contain information that is privileged, confidential or otherwise protected from disclosure. If you have received this transmission, but are not the intended recipient, you are hereby notified that any disclosure, copying, distribution or use of the contents of this information is strictly prohibited. If you have received this e-mail in error, please contact the BCRC Electronic Data Interchange (EDI) Department at (646) 458-6740 and delete and destroy the original message and all copies.

**Slide notes**

Once you have been selected and added to an account as an Account Designee, the CRCP sends you an invitation email that includes instructions on your next steps. A sample email is shown on the slide. The invitation email will include the CRCP Account ID.

If you already have a Login ID for the Section 111 Coordination of Benefits Secure Website (COBSW), Workers' Compensation Medicare Set-Aside Portal (WCMSAP), Medicare Secondary Payer Recovery Portal (MSPRP) or CRCP (for another account), you will not register for another Login ID. The invitation email will include a link to the CRCP. You will access the CRCP using your existing Login ID and Password for these systems.

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

Slide 6 of 22 - Login Warning Page

**CMS** Commercial Repayment Center Portal **COB&R** Coordination of Benefits and Recovery

[Print this page](#)

### Login Warning

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, and/or 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 1862(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.

**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 <https://www.cms.gov/Medicare/Coordination-of-Benefits-and-Recovery/Coordination-of-Benefits-and-Recovery-Overview/CRCP/Commercial-Repayment-Center-Portal-.html>

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

[CMS/HHS Vulnerability Disclosure Policy](#) | [Privacy Policy](#) | [User Agreement](#) | [Adobe Acrobat](#)

Slide notes

When you click the link in the invitation email, the Login Warning page will appear. This page provides information about CRCP security measures including access, penalty and privacy laws. This page can be printed from CRCP by clicking the Print this page link on the website.

Scroll to the bottom of this page to review the entire statement. You must agree to the terms of this warning each time you access the CRCP. Click the I Accept link at the bottom of the page to continue.

Slide 7 of 22 - Account Designee Registration Page

Skip Navigation | [Print this page](#)

**CMS** Commercial Repayment Center Portal **COB&R**  
CENTERS FOR MEDICARE & MEDICAID SERVICES Coordination of Benefits and Recovery

Home User Options Account Settings About This Site CMS Links How To... Reference Materials Contact Us Log off

**Account Designee Registration** [Quick Help](#)

You have been invited to be a Designee for the Account ID displayed on this page. In order to access this Account ID, you must register and establish a Login ID and a Password for yourself.

To begin the registration process, enter the Passphrase that the Account Manager created for you, agree to the terms presented in the User Agreement and Privacy Policy in the scrolling box, and then click Continue. If you do not have the Passphrase, you must request it from the Account Manager. Click Cancel if you do not wish to register at this time.

Account ID: 11111111 - CIGNA

Account Manager Information			
First Name:	Michael	MI:	Last Name: Smith
Phone:	(315) 633-9087		
E-mail:	MSmith@AMC.com		
Enter the Passphrase:	<input type="text"/>		

You must read the User Agreement and Privacy Policy provided in the scrolling box. To accept the agreement, click the 'I accept' checkbox. You must accept and agree to the terms of the User Agreement in order to continue the registration process.

[View and print the User Agreement and Privacy Policy](#)

### User Agreement & Privacy Policy

- Purpose of the Commercial Repayment Center Portal (CRCP) Secure Web site**  
The Commercial Repayment Center Portal (CRCP) will allow for the electronic submissions of Documented Defense documentation.
- Privacy Act Statement/ Systems of Record/ Disclosure Policy**  
The U.S. Department of Health and Human Services (HHS) at (<http://www.hhs.gov/index.html>), of which the CMS CRCP Web site is a part, has a

**Slide notes**

The Account Designee Registration page appears. As an Account Designee, you register yourself on the CRCP. You will only go through this process once, as you need only one Login ID no matter how many Account IDs you will ultimately work with.

This is the initial page in the registration process where you will create your Login ID and Password for the CRCP.

Slide 8 of 22 - Passphrase

The screenshot displays the 'Account Designee Registration' page on the CMS Commercial Repayment Center Portal. At the top, there are logos for CMS (Centers for Medicare & Medicaid Services) and COB&R (Coordination of Benefits and Recovery). A navigation bar includes links for Home, User Options, Account Settings, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Log off. The main content area is titled 'Account Designee Registration' and includes a 'Quick Help' link. The text explains that the user is invited to be a Designee for an Account ID and must register with a Login ID and Password. It instructs the user to enter the Passphrase provided by the Account Manager, agree to the terms, and click 'Continue'. The Account ID is listed as 11111111 - CIGNA. Below this is a table for 'Account Manager Information' with fields for First Name (Michael), MI, Last Name (Smith), Phone ((315) 633-9087), and E-mail (MSmith@AMC.com). A red-bordered input field is labeled 'Enter the Passphrase:'. Below the table, there is a section for 'User Agreement & Privacy Policy' with a scroll bar on the right. The policy text includes the purpose of the CRCP Secure Web site and the Privacy Act Statement/ Systems of Record/ Disclosure Policy.

Slide notes

You are required to enter the Passphrase given to you by the Account Manager for this account. The Passphrase is a short sequence of case-sensitive letters, numbers, and/or symbols, up to 30 characters long.

Enter the passphrase exactly the way it was given to you. If the Account Manager did not provide you with the Passphrase, contact them at the phone number or email address displayed on this page.

**Slide 9 of 22 - User Agreement and Privacy Policy**

To begin the registration process, enter the Passphrase that the Account Manager created for you, agree to the terms presented in the User Agreement and Privacy Policy in the scrolling box, and then click Continue . If you do not have the Passphrase, you must request it from the Account Manager. Click Cancel if you do not wish to register at this time.

Account ID: 11111111 - CIGNA

Account Manager Information			
First Name:	Michael	MI:	Last Name: Smith
Phone:	(315) 633-9087		
E-mail:	MSmith@AMC.com		
Enter the Passphrase:	<input type="text"/>		

You must read the User Agreement and Privacy Policy provided in the scrolling box. To accept the agreement, click the 'I accept' checkbox. You must accept and agree to the terms of the User Agreement in order to continue the registration process.

[View and print the User Agreement and Privacy Policy](#)

### User Agreement & Privacy Policy

**1. Purpose of the Commercial Repayment Center Portal (CRCP) Secure Web site**  
The Commercial Repayment Center Portal (CRCP) will allow for the electronic submissions of Documented Defense documentation.

**2. Privacy Act Statement/ Systems of Record/ Disclosure Policy**  
The U.S. Department of Health and Human Services (HHS) at (<http://www.hhs.gov/index.html>), of which the CMS CRCP Web site is a part, has a clear privacy policy. When you access the CRCP, we collect the minimum amount of information about you necessary to manage your account. The authority for CMS to collect this information is Section 1862(b)(2) of the Social Security Act.

Information originally collected in traditional paper systems can be submitted electronically, i.e., electronic commerce transactions and information updates about eligibility benefits. Electronically submitted information is maintained and destroyed pursuant to the Federal Records Act and in some cases may be subject to the Privacy Act. If information that you submit is to be used in a Privacy Act system of records, there will be a Privacy Act Notice provided.

The basic insurance data created internally to ensure that Medicare only makes primary claim payment when appropriate may be disclosed only as permitted by the routine use disclosure provisions outlined for each of the above systems of record. The HHS and CMS do not disclose, give,

Please check the following box:

I accept the User agreement and Privacy Policy.

**Slide notes**

Read the User Agreement and Privacy Policy which may be viewed in the scroll box at the bottom of the Account Designee Registration page. Alternatively, you can print a copy of the agreement by clicking the View and Print the User Agreement and Privacy Policy link.

You must agree to the terms in the User Agreement to proceed with your registration. To accept the agreement, click the I accept checkbox and then click Continue to proceed to the next page in the Account Designee Registration process.

Slide 10 of 22 - Account Designee Personal Information Page

Slide notes

The Account Designee Personal Information page appears. All fields with an asterisk (\*) are required. Enter your name, phone number and mailing address. Place the street number and street name in the Address Line 1 field. Place other information such as suite number, attention to, etc. in the Address Line 2 field, if applicable. When you have entered the required information, click Continue.

Slide 11 of 22 - Account Designee Login Information Page

The screenshot shows the 'Account Designee Login Information' page. At the top, there are logos for CMS (Centers for Medicare & Medicaid Services) and COB&R (Coordination of Benefits and Recovery). A navigation bar includes links for Home, User Options, Account Settings, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Log off. The main content area has a title 'Account Designee Login Information' and a 'Quick Help' link. Below the title, there is introductory text: 'To become a registered Commercial Repayment Center Portal (CPRP) user, you must select a Login ID and Password and two security questions and answers. All fields are required.' and 'You will use your Login ID and Password to access the CRCP. Click Continue when you have completed your entry. Click Cancel if you would like to exit the registration process; all data will be lost.' A section titled 'Login ID and Password requirements:' lists several bullet points: Login IDs must be 7 characters, unique, and in the format AA999AA; Passwords must be changed every 60 days, not contain the Login ID, be at least 8 characters, contain one upper-case letter, one lower-case letter, one number, and one special character, be different from the last 24 passwords, contain a minimum of 4 changed characters from the previous password, not start with a numeric (0-9), not be changed more than once per day, and not contain reserved words. Below the requirements is a form section titled 'Login ID and Password Selection' which is highlighted with a red border. It contains three input fields: '\* Login ID:', '\* Password:', and '\* Re-enter Password:'. Below this is a section for 'Security Question and Answer Selection'.

Slide notes

The Account Designee Login Information page appears. This page is used to set up your Login ID and Password. Use your existing ID or create and enter a Login ID and enter and re-enter a Password that conforms to the CMS standard guidelines shown on the slide. You will use your Login ID and Password to access the CRCP site.

### Slide 12 of 22 - Security Questions

all data will be lost.

Login ID and Password requirements:

- Login IDs must be 7 characters
- Login IDs must be unique within the system
- Login IDs must be in the format of AA999AA (first two alphabetic, next three numeric, last two alphabetic)
- Password must be changed every sixty (60) days.
- Password cannot contain your Login ID
- Password must consist of at least eight (8) characters.
- Password must contain at least one upper-case letter, one lower-case letter, one number and one special character.
- Password must be different from the last twenty four (24) passwords
- Password must contain a minimum of four (4) changed characters from the previous password.
- The first character of your password may not be numeric (0-9)
- Password cannot be changed more than once per day
- Password cannot contain a reserved word listed on the help page
- Password cannot contain a reserved word (See the Quick Help for a complete list).

**Login ID and Password Selection**

* Login ID:	<input type="text"/>
* Password:	<input type="password"/>
* Re-enter Password:	<input type="password"/>

**Security Question and Answer Selection**

The Security Questions are part of the CRCP online security process designed to help prevent unauthorized access to your account. The questions and answers you choose will enable you to regain account access if you forget your password. Please note the answers you provide to these questions should be actual answers and not hints for your password. You must select 2 questions and answers.

* Security Question 1:	Please Select <input type="button" value="v"/>
* Answer 1:	<input type="text"/>
* Security Question 2:	Please Select <input type="button" value="v"/>
* Answer 2:	<input type="text"/>

#### Slide notes

Choose security questions and provide answers that are easily remembered. This information will allow you to access your Login ID and reset your Password in the event you forget either one.

When you have completed the Account Designee Login Information page, click Continue.

Slide 13 of 22 Account Designee Registration Summary Page

Account Designee Registration Summary Quick Help

Please review your personal and login information. If you need to change anything, click the Edit button next to the section that needs modifications. If the information is correct, click Continue to proceed. Click Cancel if you would like to exit the registration process; all data will be lost. Please print this page for your records.

Personal Identification Information <span>Edit</span>					
First Name:	John	MI:	G	Last Name:	Normen
E-mail Address:	JDoe@ANYco.com				
Phone:	(123) 654-9789 Ext. 2144				
Address Line 1:	234 Test Dr.				
Address Line 2:	Suite 32				
City:	Potomac				
State:	Maryland				
Zip Code:	21112-2212				
Login Information <span>Edit</span>					
Login ID:	am###am				

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

Slide notes

The Account Designee Registration Summary page will appear next. This page includes a summarized view of the information that was entered during the Account Designee registration process. It also provides you with the opportunity to revise your name, phone number, address, Login ID and/or Password.

Once you have completed any corrections, click Continue on the page you are editing, as well as each subsequent page until you return to the Account Designee Registration Summary page.

When you have verified the information, click Continue.

Slide 14 of 22 - Account Designee - Thank You Page

The screenshot shows the 'Account Designee. Thank You' page. At the top, there are navigation links: 'Skip Navigation', 'Login ID : GH111GH', and 'Print this page'. The main header features the CMS logo (Centers for Medicare & Medicaid Services) and the COB&R logo (Coordination of Benefits and Recovery). Below the header is a navigation menu with links: 'About This Site', 'CMS Links', 'How To...', 'Reference Materials', and 'Contact Us'. The main content area has the title 'Account Designee. Thank You' and a 'Quick Help' link. The text reads: 'You have successfully completed your registration for the Commercial Repayment Center Portal (CRCP) and established yourself as an Account Designee for Account ID: 11111. You may print this page for your records.' Under 'Next Steps', it says: 'You may use the Login ID and Password you created to access the CRCP at the following link: <http://www.cob.cms.hhs.gov/CRCP/>'. A green 'OK' button is highlighted with a red box. At the bottom, there is a footer with links: 'CMS/HHS Vulnerability Disclosure Policy', 'Privacy Policy', 'User Agreement', and 'Adobe Acrobat'.

Slide notes

The Account Designee Thank You page will appear. This confirms that you have successfully completed your registration.

Click OK to return to the Login Warning page.

Slide 15 of 22 - Login Warning Page



**CMS**  
CENTERS FOR MEDICARE & MEDICAID SERVICES

## Commercial Repayment Center Portal



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

### Login Warning

**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, and/or 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 1862(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.

**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 <https://www.cms.gov/Medicare/Coordination-of-Benefits-and-Recovery/Coordination-of-Benefits-and-Recovery-Overview/CRCP/Commercial-Repayment-Center-Portal-.html>

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

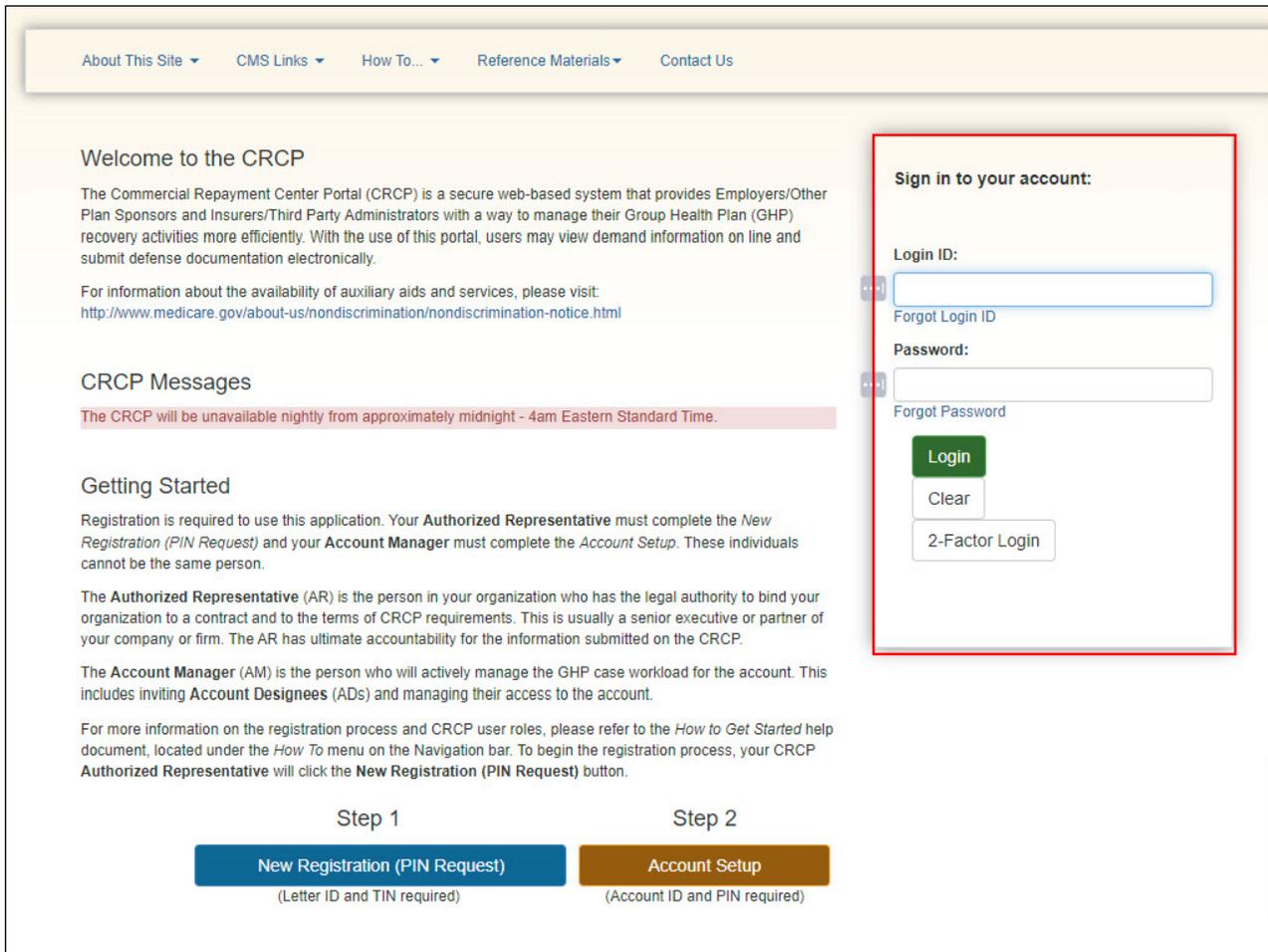
Decline I Accept

[CMS/HHS Vulnerability Disclosure Policy](#) | [Privacy Policy](#) | [User Agreement](#) | [Adobe Acrobat](#)

Slide notes

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

Slide 16 of 22 - Welcome to the CRCP - Login Page



Slide notes

The Welcome to the CRCP page appears. You can login to the CRCP using the Login ID and Password you just created and begin using the CRCP to access accounts associated with your Login ID. Enter your Login ID and Password and then click Login.

If you forget your password, select “Forgot Password” and you can enter the temporary password sent to the designated email for this account.

The Forgot Password feature on the CRCP Welcome page now allows users to unlock their account, if locked after three unsuccessful login attempts, or to reactivate an inactive account. Note: To provide increased user security, additional security questions have been added to the Forgot Login ID and Forgot Password pages.

Note: To provide increased user security, additional security questions have been added to the Forgot Login ID and Forgot Password pages. Three preliminary questions linked to your personal registration information will appear prior to your security questions.

Slide 17 of 22 - Account Listing Page

Home User Options About This Site CMS Links How To... Reference Materials Contact Us Log off

### Account Listing Quick Help

The Account IDs associated to your Login ID are listed on this page. Account IDs with a green leaf (🌿) have opted in to "Go Paperless". These accounts receive letter notification emails instead of mailed letters. You are responsible for viewing all correspondence on the CRCP for "Go Paperless" accounts. Select the Account ID you want to access by clicking the appropriate Account ID link. To view a list of all Tax Identification Numbers (TINs) associated to an Account ID, click the corresponding View TINs Listing link.

**Multi-Factor Authentication**

Status: **Initial Process**  
Next Step: [Getting Started](#)



#### Multi-Factor Authentication

CRCP users may request access to view unmasked Medicare beneficiary Protected Health Information (PHI)/Personally Identifiable Information (PII). Individuals requesting this access must complete the ID Proofing and Multi-Factor Authentication (MFA) process. The status of your request will display as a link under the Multi-Factor Authentication box. You will click this link to progress through the required steps. Once you have successfully completed this process your status will be changed to Complete.

During the ID Proofing process, you will be asked to provide current personal information to confirm your identity with Experian Credit Services (an outside entity). This information will not be stored on the CRCP. This process will not impact your credit score.

To use MFA services, you will be required to register for a Factor Type (**Voice Call and/or Text Message (SMS)**) as a method of receiving your security token to access the CRCP application using your MFA Login. When registering for **Voice Call**, a landline phone or mobile device may be used to receive the security token via phone call. To register for **Text Message (SMS)** you must register with a mobile phone number to receive your security token via text message. After the Factor registration, you must then activate the Factor for your login ID. You may only have ONE registered or activated phone number per factor type.

You will be able to activate the factor after the Next Step link has changed to **Factor Required**. To begin the ID Proofing process, click the Next Step: **Getting Started** link.

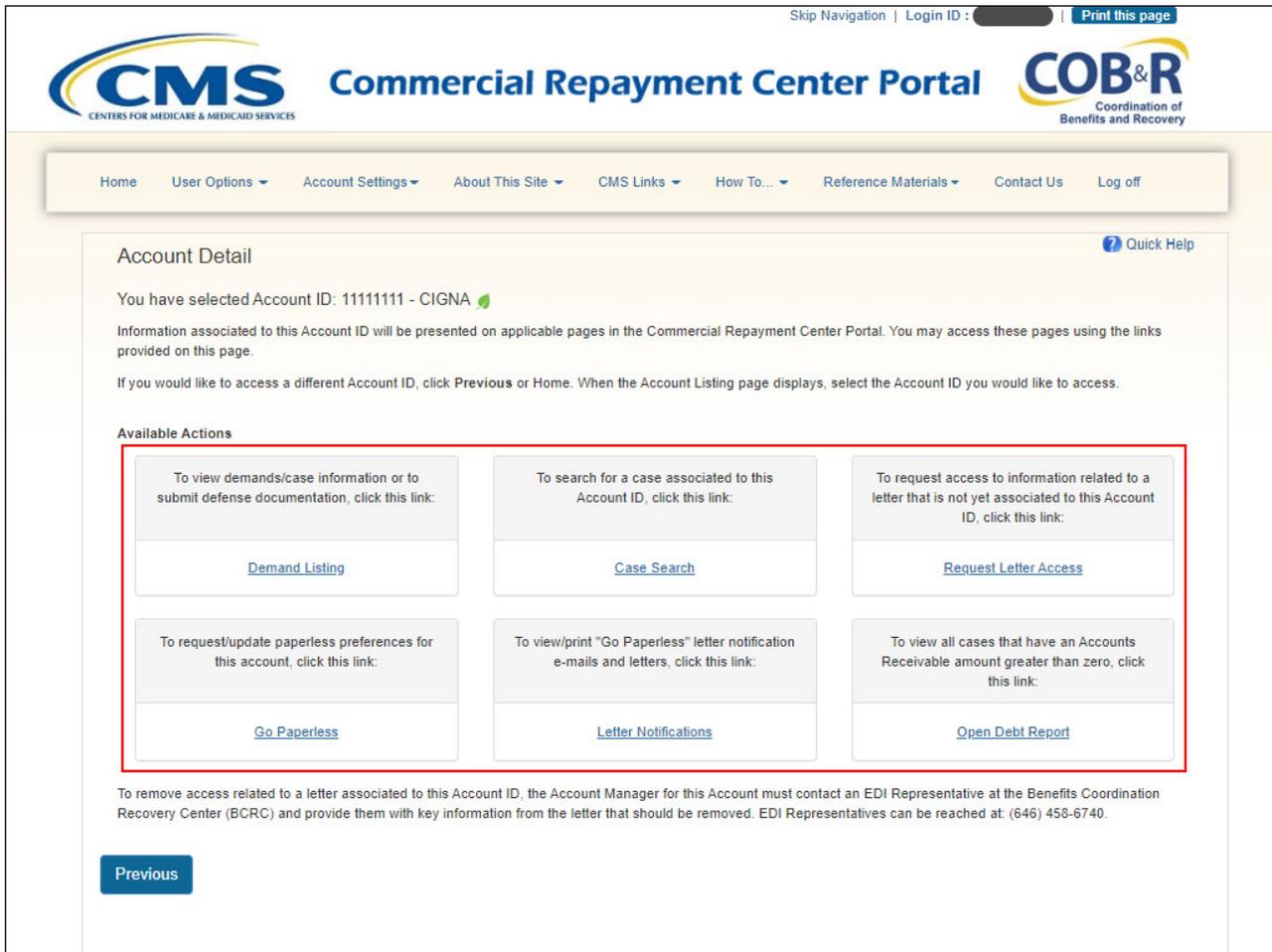
Account ID	Company Name	Associated TINs
<a href="#">11111111</a> 🌿	CIGNA	<a href="#">View TINs Listing</a>
<a href="#">22222222</a>	United Health Care	<a href="#">View TINs Listing</a>

Slide notes

The Account Listing page appears. You are now logged into the CRCP system. The Account Listing page is the CRCP Home page. This page functions as the main page where you will select the Account ID that you want to work on. The Account IDs listed on this page are the accounts you are associated with.

Click the Account ID you want to work with.

Slide 18 of 22 - Account Detail Page



Slide notes

The Account Detail page will appear. The Account ID you just selected is displayed at the top of the page. This page functions as the main page where you can access the CRCP functions available to you: Demand Listing, Case Search, and Request Letter Access.

Demand Listing is used to view demands/case information or to submit defense documentation. For more information on this function, see the "Demands" CBT. Once a Demand is issued, users can make electronic payments. For more information on this function, see the "Electronic Payment" CBT.

Case Search is used to search for a case associated with the selected Account ID.

Request Letter Access is used to associate data related to a Demand or Defense Letter to your CRCP account. See the "Request Letter Access" CBT for more information.

Go Paperless is used to request or update paperless preferences for the account selected.

Letter Notification is used to view or print "Go Paperless" letter notification emails and letters for the account ID selected. A Clear button, and a new downloaded column have been added to the Letters for Email Date page so users can see when paperless letters were downloaded.

Open Debt Report is used to view all cases that have an Accounts Receivable amount greater than zero.

The Open Debt Report page: has the following columns added:

- Claim Count,
- Treasury Ref Date,
- Last Letter,
- Last Letter Date,
- Fed Agency ID and
- Four columns to identify authorized parties have been added to the Open Debt Report

The following links are only available for the

- Account Manager:
- Open Debt Report,
- Go Paperless, and
- Letter Notifications

Slide 19 of 22 - Assistance

## Assistance

Contact EDI Representative for assistance with Account Designee registration and login issues



EDI Representative phone:

(646) 458-6740

### Slide notes

If you are unable to register for the CRCP or are having trouble logging in to your account, please contact an Electronic Data Interchange (EDI) Representative. EDI Representatives may be reached by phone at: (646) 458-6740.

Slide 20 of 22 - Course Summary

## Course Summary

- Account Designee Registration
  - Setting up a Login ID and Password
- CRCP Functions of the Account Designee



### Slide notes

This course explained the basic registration process a new user will follow to become an Account Designee, (i.e., how you will set up your Login ID and Password) and the basic CRCP functions you will have access to once registered.

**Slide 21 of 22 - Conclusion**



You have completed the CRCP Account Designee Access course. Information in this course can be referenced by using the CRCP User Guide found under the *Reference Materials* menu at the following link:  
<https://www.cob.cms.hhs.gov/CRCP/>.

**Slide notes**

You have completed the CRCP Account Designee Access course. Information in this course can be referenced by using the CRCP User Guide found under the Reference Materials menu at the [CMS CRCP Website](https://www.cob.cms.hhs.gov/CRCP/).

**Slide 22 of 22 - CRCP Training Survey**



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

**Slide notes**

If you have any questions or feedback on this material, please go to the following URL: [CRCP Training Survey](https://www.surveymonkey.com/r/CRCPTraining)