Account Setup

Slide 1 of 23 - Account Setup

Slide notes

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

Slide 2 of 23 - 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

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Slide 3 of 23 - Course Overview

Course Overview

- Registration and Account Setup - 2 steps

    ▪ Step 1 - New Registration (PIN Request)
        ◦ See New Registration (PIN Request) course

    ▪ Step 2 - Account Setup
   ◦ Requirements for completion
        ◦ Next Steps

Slide notes

Upon completion of this course, you will be able to complete the CRCP two-step process to register and setup a new account: Step 1: New Registration (PIN Request) (performed by the Authorized Representative, or another person on the Authorized Representative's behalf) and Step 2: Account Setup (performed by the Account Manager).

This module reviews the Account Setup process. It explains what is required to complete account setup and the steps to follow once the Account Setup has been completed. See the "New Registration - (PIN Request)" course for information on Step 1.

Slide 4 of 23 - Getting Started
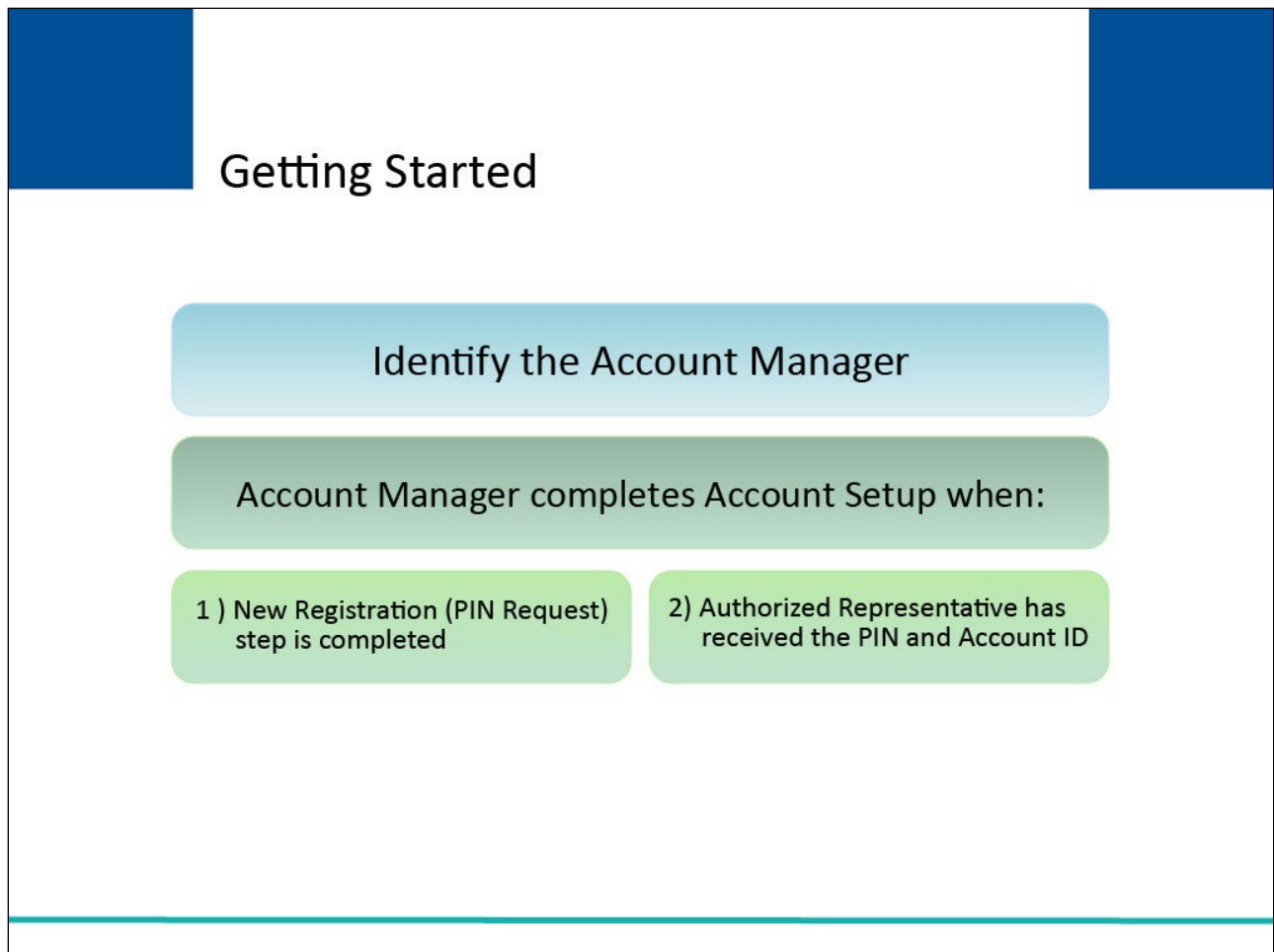
Slide notes

The Authorized Representative must designate the Account Manager. The Account Manager is responsible for completing the Account Setup.

Account Setup can only be initiated after the employer or insurer has completed the New Registration (PIN Request) step and their Authorized Representative has received an email from the Commercial Repayment Center (or CRC) containing the PIN. The Authorized Representative will then provide the Account Manager with the PIN and the Account ID that had been recorded from the "CRCP PIN Request Completed Successfully"- Thank you page.

The Account Manager will need this information to complete the Account Setup.

Slide 5 of 23 - Getting Started

Getting Started

Account Manager

Established during Account Setup

Registered CRCP User

- Can be associated to other CRCP accounts

Controls administration of the account

May invite other individuals to assist in the process
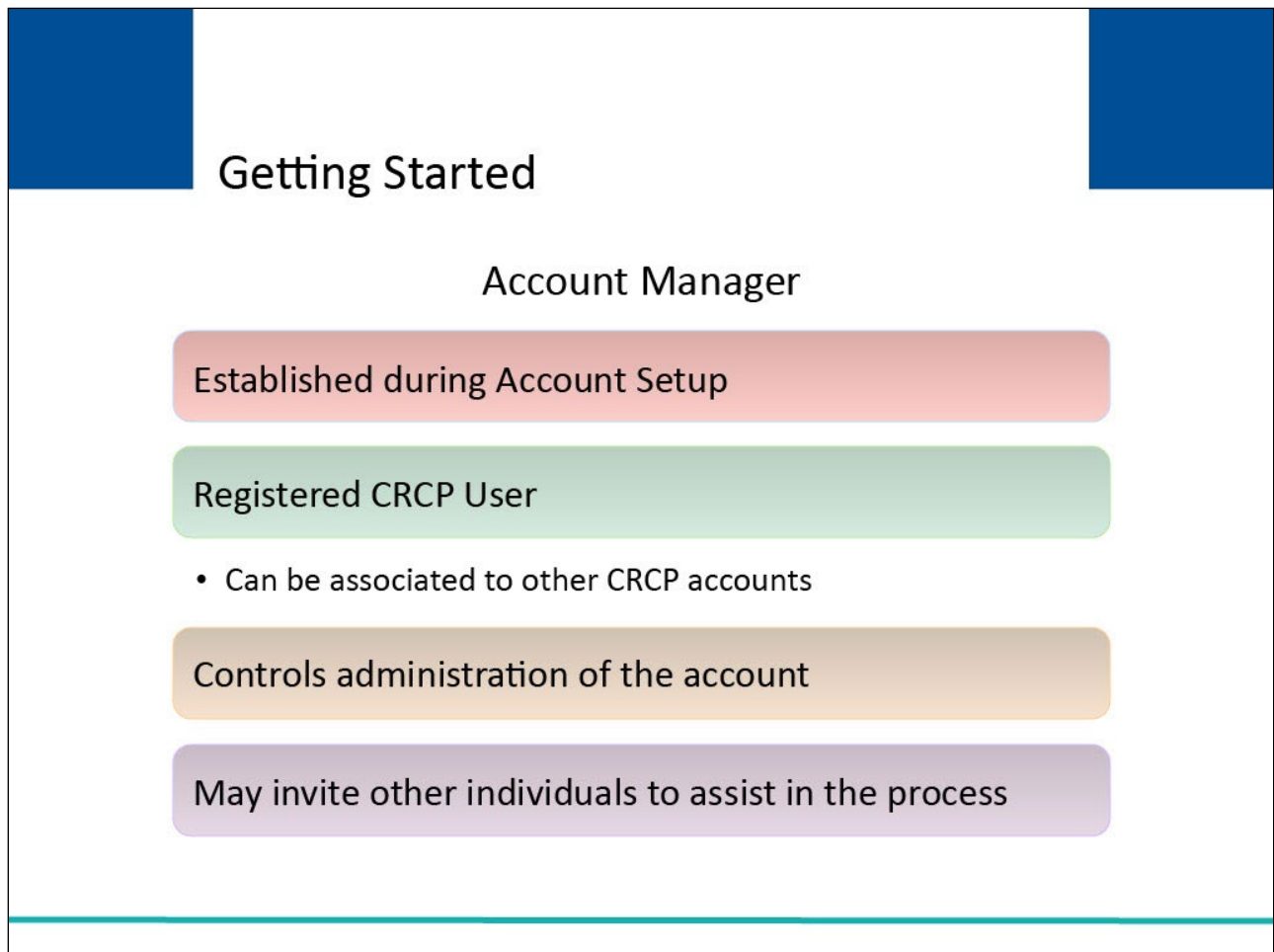
Slide notes

Each CRCP account must have an assigned Account Manager. This person is established during the Account Setup process. Each CRCP account can have only one Account Manager.

The Account Manager is a registered user of the system and can be associated to other CRCP accounts as an Account Manager or an Account Designee. This person controls the administration of the account.

The Account Manager may invite other individuals to assist in this process. Please see the "Account Designee Maintenance" CBT for information on how to add individuals to your account.

Slide 6 of 23 - Login Warning Page

Slide notes

To begin Account Setup, the Account Manager must go to the CRCP URL at the following link: CRCP Training Survey. Each time a user visits the CRCP website, 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 the CRCP by clicking the Print this page link on the website. Scroll to the bottom of this page to review the entire statement.

All users must agree to the terms of this warning each time they access the CRCP. Click the I Accept link at the bottom of the page to continue.

Slide 7 of 23 - Welcome to the CRCP - Login Page

Slide notes

The Welcome to the CRCP - Login page will appear. Click the Step 2, Account Setup link to initiate this process.

Slide 8 of 23 - Account Setup Introduction Page

Slide notes

The Account Setup Introduction page will appear. This page describes the Account Setup process and the Account Manager's responsibilities as a CRCP user.

An Account Manager can be associated to other CRCP accounts, that is, can be an Account Designee or Account Manager for another CRCP account. However, an Account Manger cannot be the Authorized Representative for any CRCP account.

If you are not associated to any other account as an Authorized Representative, click Continue to proceed.

Slide 9 of 23 - Account Setup Page

Slide notes

The Account Setup page will appear. You will enter the Account ID and PIN. The PIN was emailed to the Authorized Representative after successful completion of the PIN Request process. The Account ID displayed on the "CRCP PIN Request Completed Successfully. Thank You." page.

You will also enter and re-enter the Account Manager's email address. This email address cannot match the email address of any Authorized Representative on any CRCP account.

The system will verify that the Account ID and/or PIN are valid and have not already been registered. If either is invalid, an error message will display. If the Account ID and PIN are entered incorrectly 3 times, the account will be locked, and setup will be prevented.

You must contact an Electronic Data Interchange (EDI) Representative to unlock the account. EDI Representatives may be reached by phone at: (646) 458-6740.

If the e-mail address matches an Authorized Representative for any CRCP account, you will be prevented from registering as the Account Manager for this account.

Note: It is critical that you enter the correct email address as this information will be used to send important information regarding your account. When the required information has been entered, click Continue to proceed.

Slide 10 of 23 - Account Setup Company Information Page

Slide notes

If the system is able to validate the information entered on the Account Setup page, the Account Setup Company Information page will appear. This screen will be pre-filled with the information entered during the New Registration (PIN Request) step.

The Account Type, the company Tax Identification Number (TIN), the company name, and the Authorized Representative name and phone number will display. Review the listed information.

If the Account ID and PIN were entered correctly, but the information displayed on this page does not reflect the information for your company and/or Authorized Representative, contact an EDI Representative. If the information is correct, click Continue to proceed.

Slide 11 of 23 - Account Manager Personal Information Page

Slide notes

If you are a new user and do not already have a Login ID for the CRCP, Workers' Compensation Medicare Set-Aside Portal (WCMSAP), Medicare Secondary Payer Recovery Portal (MSPRP), and/or Section 111 Coordination of Benefits Secure Web site (COBSW), the Account Manager Personal Information page will appear. Note: If you are an existing user of any of these applications, you will not need to enter this information and will bypass this page.

All fields denoted by an asterisk are required. Enter the Account Manager's name, phone number, and address. The Email Address field will be populated with the email address that was entered on the Account Setup page and will not be editable on this page.

Slide 12 of 23 - User Agreement & Privacy Policy

Slide notes

When all required fields have been entered, review the User Agreement and Privacy Policy which may be viewed in the scroll box on this 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 in order to proceed. To accept the agreement, click the I accept checkbox and then click Continue.

Slide 13 of 23 - Account Manager Login Information Page

Slide notes

A new user registering as the Account Manager will be presented with the Account Manager Login Information page where they will set up their Login ID and Password. 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. Note: If you are an existing user of the CRCP, WCMSAP, MSPRP and/or Section 111 COBSW, this page will not display. You will not create a new Login ID for the CRCP.

You will use the same Login ID for each application and, therefore, will bypass this page.

Slide 14 of 23 - Security Questions and Answer Selections

Slide notes

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

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

When you have completed entry on the Account Manager Login Information page, click Continue.

Slide 15 of 23 - Go Paperless Page

Slide notes

Account Managers now have the Go Paperless option where letter notification emails will be sent instead of hardcopy letters to the account. These emails will be sent to the Account Manager. The Account Designees and the individual/distribution list entered in the optional "Paperless Email Address" will be copied on the notification email.

To opt in for the Go Paperless option, select the Go Paperless check box and enter and re-enter the additional Paperless email address. If you do not want to go paperless, leave the Go Paperless box unchecked and click Continue.

Slide 16 of 23 - Account Summary Information Page

Slide notes

The Account Manager Summary Information page will appear. This page includes a summarized view of the information that was entered during Account Setup. It also provides you with the opportunity to revise the Account Manager's name, phone number, address, Login ID, and the Go Paperless Information.

Review this summary to ensure it is accurate. If information needs to be corrected, click the Edit button for the corresponding section. This will direct you to the applicable page to make updates.

Once you have completed making your corrections, click Continue on the page you are editing as well as each subsequent page until you return to the Account Manager Summary Information page. When you have verified the information, click Continue to proceed with the Account Setup.

Slide 17 of 23 - Account Setup Completed. Thank You Page

Slide notes

The Account Manager Setup Completed Thank You page will appear. This page confirms that you have successfully completed the Account Setup for the CRCP Account ID and established yourself as the Account Manager for that Account.

Slide 18 of 23 - Next Steps

Slide notes

Once the Account Manager has completed the Account Setup, an email notification will be sent to the Authorized Representative. The Account Manager will be copied on this email. This notification requests the Authorized Representative to verify the details of the account.

It includes a Data Use Agreement and a Profile Report denoting all the information previously recorded during the New Registration (PIN Request) and Account Setup steps. It may take up to 10 business days to receive the Profile Report. If the report is not received within 10 business days, contact an EDI Representative at (646) 458-6740.

Slide 19 of 23 - Next Steps

Slide notes

The Authorized Representative must review the Profile Report for accuracy. If information on the Profile Report is inaccurate or requires modifications, please contact an EDI Representative at (646) 458-6740.

The Authorized Representative will have 60 business days to review, sign and return the Profile Report to the Benefits Coordination & Recovery Center (BCRC) EDI Department.

The profile report may be mailed, faxed or emailed. When returning the signed Profile Report via email, put 'CRCP Profile Report' in the subject line.

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

Slide 20 of 23 - Next Steps

Next Steps

Account Manager
- Has limited functionality until signed Profile Report has been returned
  - Can invite other individuals to be Account Designees

It is in your best interest to return the Profile Report promptly

Slide notes

You will have limited CRCP functionality until the signed Profile Report has been received. You will be able to invite other individuals to assist as Account Designees.

However, you will not be able to view demand information or submit documented defenses within the CRCP until the Profile Report has been returned. It is in your best interest to return the Profile Report promptly.

Slide 21 of 23 - Course Summary

Slide notes

You should now be able to complete the CRCP two-step process to register and setup a new account: Step 1: New Registration (PIN Request) (performed by the Authorized Representative, or another person on the Authorized Representative's behalf) and Step 2: Account Setup (performed by the Account Manager).

This module also reviewed the Account Setup process. It explained what is required to complete account setup and the steps to follow once the Account Setup has been completed. See the "New Registration (PIN Request)" course for information on Step 1.

Slide 22 of 23 - Conclusion

Slide notes

You have completed the CRCP Account Setup course. Information in this course can be referenced by using 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 23 of 23 - CRCP Training Survey

Slide notes

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