

Account Setup

Slide 1 of 23 - Account Setup

CMS
CENTERS FOR MEDICARE & MEDICAID SERVICES

COB&R
Coordination of
Benefits and Recovery

Commercial Repayment Center Portal (CRCP)

Account Setup

Version 4.1 01/07/2025
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<http://go.cms.gov/cobro>.

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

While all information in this document is believed to be correct at the time of writing, this Computer Based Training or CBT is for educational purposes only and does not constitute official Centers for Medicare & Medicaid Services or 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 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

Getting Started

Identify the Account Manager

Account Manager completes Account Setup when:

- 1) New Registration (PIN Request) step is completed
- 2) Authorized Representative has received the PIN and Account ID

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

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

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

The screenshot displays the CRCP login page. At the top, there is a navigation bar with links: "About This Site", "CMS Links", "How To...", "Reference Materials", and "Contact Us". The main content area is divided into several sections:

- Welcome to the CRCP:** A paragraph explaining that the CRCP is a secure web-based system for managing Group Health Plans (GHP) recovery activities.
- CRCP Messages:** A section for important notices.
- Getting Started:** A section explaining the registration process, defining the roles of the Authorized Representative (AR) and the Account Manager (AM).
- Sign in to your account:** A form with fields for "Login ID" and "Password", each with a "Forgot" link below it. There are "Login" and "Clear" buttons at the bottom of the form.
- Registration Steps:** Two buttons are shown: "Step 1: New Registration (PIN Request) (Letter ID and TIN required)" and "Step 2: Account Setup (Account ID and PIN required)". The "Step 2" button is highlighted with a red border.

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

The screenshot shows the 'Account Setup Introduction' page. At the top, there are logos for CMS (Centers for Medicare & Medicaid Services), Commercial Repayment Center Portal, and COB&R (Coordination of Benefits and Recovery). Below the logos is a navigation bar with links: 'About This Site', 'CMS Links', 'How To...', 'Reference Materials', and 'Contact Us'. The main content area is titled 'Account Setup Introduction' and includes a 'Quick Help' link. The text explains that the user has selected a link to guide them through account setup and provides instructions on what to do during the process. It also lists the roles of various CRCP users and describes the responsibilities of an Account Manager. At the bottom of the main content area, there are two buttons: 'Cancel' and 'Continue'. The 'Continue' button is highlighted with a red box. At the very bottom of the page, there is a footer with links to 'CMS/HHS Vulnerability Disclosure Policy', 'Privacy Policy', 'User Agreement', and 'Adobe Acrobat'.

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 Manager 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

The screenshot shows a web page for account setup. At the top, there is a navigation bar with links: About This Site, CMS Links, How To..., Reference Materials, and Contact Us. Below this is a main content area with a sub-navigation bar containing the same links. The main text explains that registration and a PIN were emailed to the contact after vetting. It notes that users can be Account Managers for multiple CRCP accounts or Account Designees for others. A note specifies that users cannot be Authorized Representatives for any CRCP account. A legend states that an asterisk (*) indicates a required field. The form contains four fields: Account ID, Personal Identification Number (PIN), Account Manager E-Mail Address, and Re-enter Account Manager E-Mail Address. The first two fields are highlighted with a red box. At the bottom of the form are buttons for Previous, Cancel, and Continue. A footer bar contains links for CMS/HHS Vulnerability Disclosure Policy, Privacy Policy, User Agreement, and Adobe Acrobat.

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

Account Setup Company Information [Quick Help](#)

Please verify that the following information is correct for the account you are setting up. If the information is correct, click **Continue** to proceed.

If the information is incorrect, click **Cancel**. The Account Setup process cannot be completed at this time. Please contact an EDI Representative at: (646) 458-6740 for assistance.

Company Information	
Account Type:	Insurer-Insurers and Claims Processing Third Party Administrators (TPAs)
Tax Identification Number (TIN):	123456789
Company Name:	CIGNA

Authorized Representative (AR) Information					
First Name:	John	MI:	G	Last Name:	Normen
Title:	Chief Executive Officer				
E-mail Address:	ceo@company.com				
Phone:	(123) 654-789 Ext.768				
Fax:	(778) 458-987				

[Previous](#) [Cancel](#) [Continue](#)

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

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

Skip Navigation | [Print this page](#)

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

About This Site ▾ CMS Links ▾ How To... ▾ Reference Materials ▾ Contact Us

Account Manager Personal Information [Quick Help](#)

Please enter the requested information to identify yourself as a CRCP user.
An asterisk (*) indicates a required field.

* First Name:	<input type="text"/>	MI:	<input type="text"/>	* Last Name:	<input type="text"/>
* E-mail Address:	email_entered_in_accountsetup_page@domain.com				
* Phone:	<input type="text"/>	-	<input type="text"/>	-	<input type="text"/> Ext <input type="text"/>
* Address Line 1:	<input type="text"/>				
Address Line 2:	<input type="text"/>				
* City:	<input type="text"/>				
* State:	Please Select ▾				
* Zip Code:	<input type="text"/>	-	<input type="text"/>		

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

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

User Agreement & Privacy Policy

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

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

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

Skip Navigation | [Print this page](#)

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

About This Site ▾ CMS Links ▾ How To... ▾ Reference Materials ▾ Contact Us

Account Manager Login Information [Quick Help](#)

To become a registered CRCP user, you must select a Login ID and Password and two security questions and answers. You will use your Login ID and Password to access the CRCP. All fields are required.

The security information requested on this page will allow the system to authenticate your identity each time you log on. This will ensure only you are provided the access and updating privileges restricted to the Account Manager. Click **Continue** when you have completed your entry. Click **Cancel** if you would like to exit the Account Setup process; 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 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 contain a minimum of four (4) changed characters from the previous password.
- Password cannot be changed more than once per day.
- Password must be different from the previous twenty four (24) passwords.
- Password cannot contain a reserved word (See Quick Help for a complete list).

An asterisk (*) indicates a required field.

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

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

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

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

User Agreement & Privacy Policy

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2. Privacy Act Statement/ Systems of Record/ Disclosure Policy

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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.

[Previous](#) [Cancel](#) [Continue](#)

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

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

Navigation: [About This Site](#) | [CMS Links](#) | [How To...](#) | [Reference Materials](#) | [Contact Us](#)

Go Paperless Quick Help

When the **Go Paperless** check box is selected, letter notification e-mails will be sent instead of hard copy letters being mailed to the account. These e-mails will be sent to the Account Manager. The Account Designees and the individual/distribution list entered in the optional **Paperless E-mail Address** below will be copied on the notification e-mail. Individuals associated to an account that has opted in to the "Go Paperless" option are responsible for viewing all correspondence on the CRCP. These individuals must complete the ID Proofing and Multi-Factor Authentication (MFA) process and log in using MFA to view the correspondence images.

To go paperless, select the **Go Paperless** check box and, if desired, enter and re-enter the additional **Paperless E-mail Address**. If you do not want to go paperless, leave the **Go Paperless** box unchecked.

Click **Continue** to proceed. Click **Cancel** if you would like to exit the registration process; all data will be lost.

Go Paperless Information

<input type="checkbox"/> Go Paperless	Account ID: 11111, COMPANY NAME
Account Manager E-mail Address:	ADDRESS@EMAIL.COM
Paperless E-mail Address:	<input type="text"/>
Re-enter Paperless E-mail Address:	<input type="text"/>

[Previous](#) | [Cancel](#) | [Continue](#)

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

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

About This Site CMS Links How To... Reference Materials Contact Us

Account Summary Information Quick Help

Please verify that the information displayed on this page is correct. If any changes are necessary, click the Edit button next to the section that requires modifications. If the information is correct, click Continue to proceed. Click Cancel to cancel the Account Setup process. If you click Cancel, all data will be lost. You may print this page for your records.

Account Manager Information					Edit
First Name:	John	Middle Name:	G	Last Name:	Normen
E-mail Address:	firstname.lastname@yourdomain.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				
Account Manager Login Information					Edit
Login ID:	am###am				
Go Paperless Information					Edit
Account ID:	11111				
Company Name:	Company ABC				
Paperless:	The account is opted in to Go Paperless. It will begin receiving letter notifications e-mails and stop receiving mailed letters within 5-10 business days of the account being activated.				
Paperless Email Address	Address@Email.com				

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

The screenshot shows the 'Account Setup Completed. 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 is titled 'Account Setup Completed. Thank You.' and includes a 'Quick Help' link. The text states: 'You have successfully completed the Account Setup for the Commercial Repayment Center Portal (CRCP) and established yourself as the Account Manager for the Account ID. Please print this page for your records.' Below this, there is a 'Next Steps' section with detailed instructions: 'Upon account setup completion, the Benefits Coordination & Recovery Center (BCRC) will send a profile report via e-mail to the named Authorized Representative. You as the Account Manager will be copied on the e-mail. Your Authorized Representative must review, sign and return the profile report to the BCRC in accordance with the instructions noted within the e-mail. Prior to submission of the signed Profile Report, you will have limited CRCP functionality. You will be able to login and invite other users to be Account Designees but will not be able to view or submit documented defense information within the CRCP. Once the BCRC has received and processed your Profile Report, you will be granted full access to the CRCP. If you do not receive the Profile Report within 10 business days, please contact an Electronic Data Interchange (EDI) Representative at (646) 458-6740. Please note: If you are returning your Profile Report via e-mail, please enter "CRCP Profile Report" in the subject line.' At the bottom of the main content area is a green 'OK' button. The footer contains links for 'CMS/HHS Vulnerability Disclosure Policy', 'Privacy Policy', 'User Agreement', and 'Adobe Acrobat'.

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

Next Steps

- Within 10 business days of Account Setup completion, a Profile Report is emailed to the Authorized Representative
- Contact an EDI Representative if the Profile Report is not received within 10 business days
 - EDI Representative Phone: (646) 458-6740

**Commercial Repayment Center Recovery Portal
(CRCR)
Profile Report**

Account ID: [Insert Account ID] Account Type: [Insert Account Type Employer/Insurer] Date: [Insert Current Date]

BRCR EDI Contact Information:
 E-mail: COBVA@GHIIMedicare.com Phone: (546) 458-6740

Company Information:

TIN: [Insert Company TIN]
 Name: [Insert Profile ID Company Name]

Authorized Representative:

Name: [Insert AR Last Name + ', ' + AR First Name] Phone: [Insert Phone]
 Title: [Insert AR Title] Fax:
 E-mail: [Insert AR E-mail address]

Account Manager:

Name: [Insert AM Last Name + ', ' + AM First Name] Phone: [Insert Phone]
 Address: [Insert AM Street Address 1 & 2]
 [Insert AM City, State & Zip Code]
 E-mail: [Insert AM E-mail address]

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

The slide is titled "Next Steps" and features a central graphic with a green background. On the left, a rounded rectangle contains the text "Authorized Representative". To its right, two stacked boxes list requirements: the top one for reviewing and signing the report, and the bottom one for returning it within 60 days. Below these, a larger rounded rectangle contains a warning about account deletion if the report is not received in time.

Next Steps

- Must review and sign the Profile Report
 - Contact an EDI Representative to request modifications
 - EDI Representative Phone: (646) 458-6740
- Return Profile Report within 60 business days
 - Mail, fax or email the report to the BCRC EDI Department
 - For email, put 'CRCP Profile Report' in the subject line

If signed Profile Report is not received within 60 days, the account will automatically be deleted

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

The slide features a white background with two blue decorative squares in the top corners. The title 'Next Steps' is centered at the top. Below it, a green rounded rectangle contains the text 'Account Manager'. To its right, a larger green rounded rectangle contains a bulleted list. Below these, a wide green rounded rectangle contains a concluding statement.

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

Course Summary

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

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

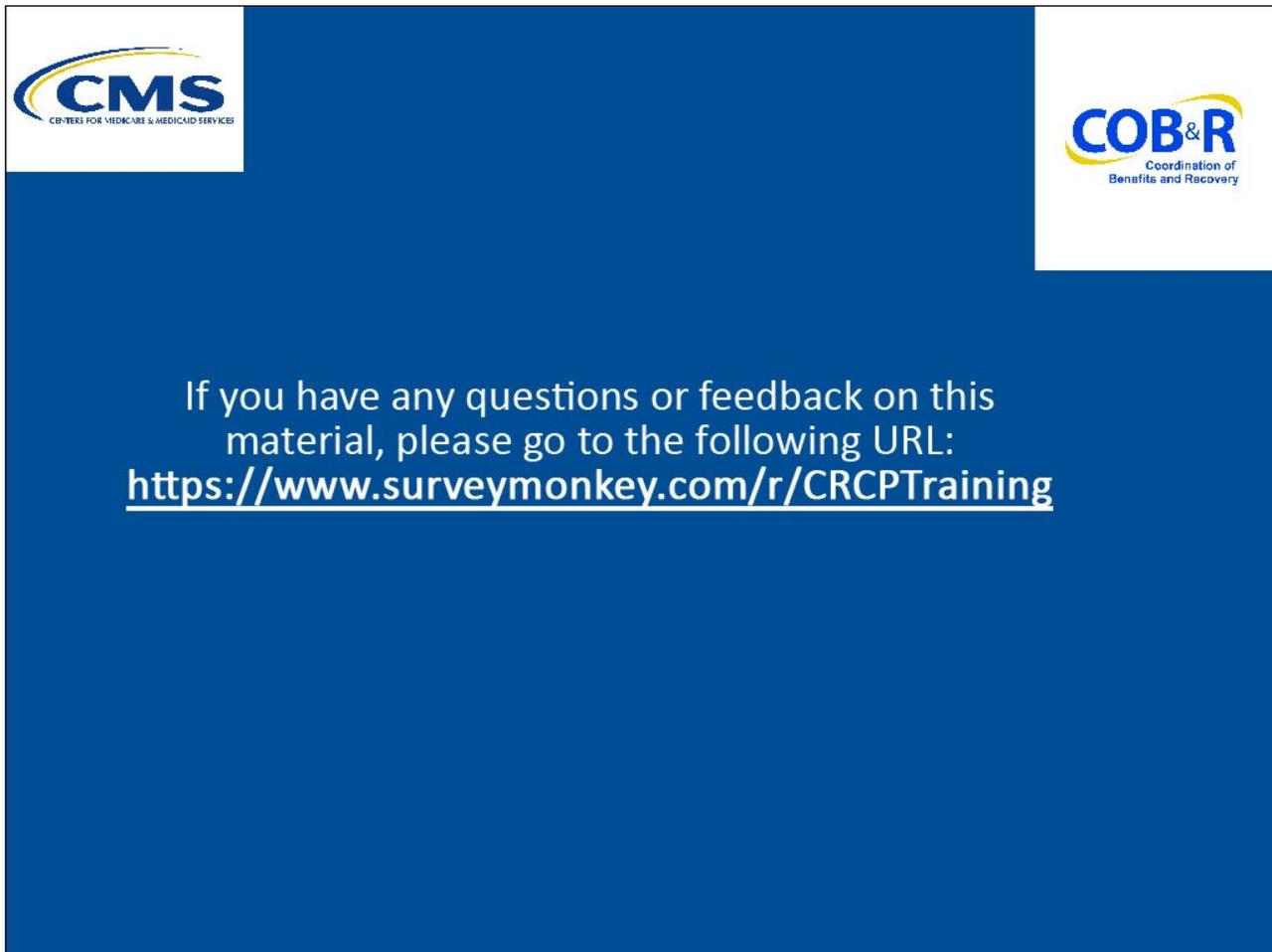


You have completed the CRCP Account Setup course. Information in this course can be referenced by using the CRCP User Guide found under the *Reference Materials* menu at the following link:
<https://www.cob.cms.hhs.gov/CRCP/>.

Slide notes

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Slide 23 of 23 - CRCP Training Survey



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). The main text in the center reads: "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).