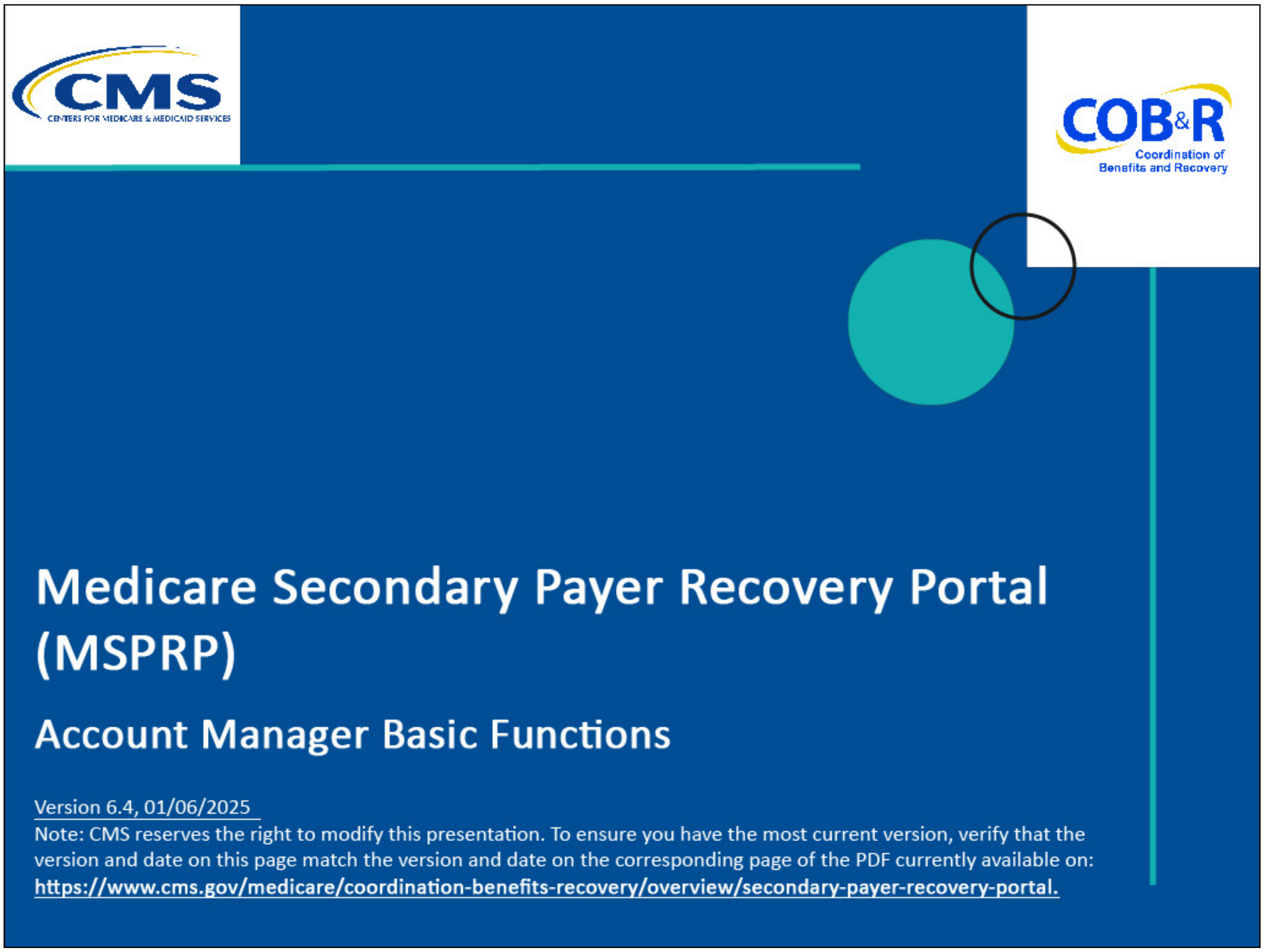
Account Manager Basic Functions Introduction

Slide 1 of 48- Account Manager Basic Functions Introduction



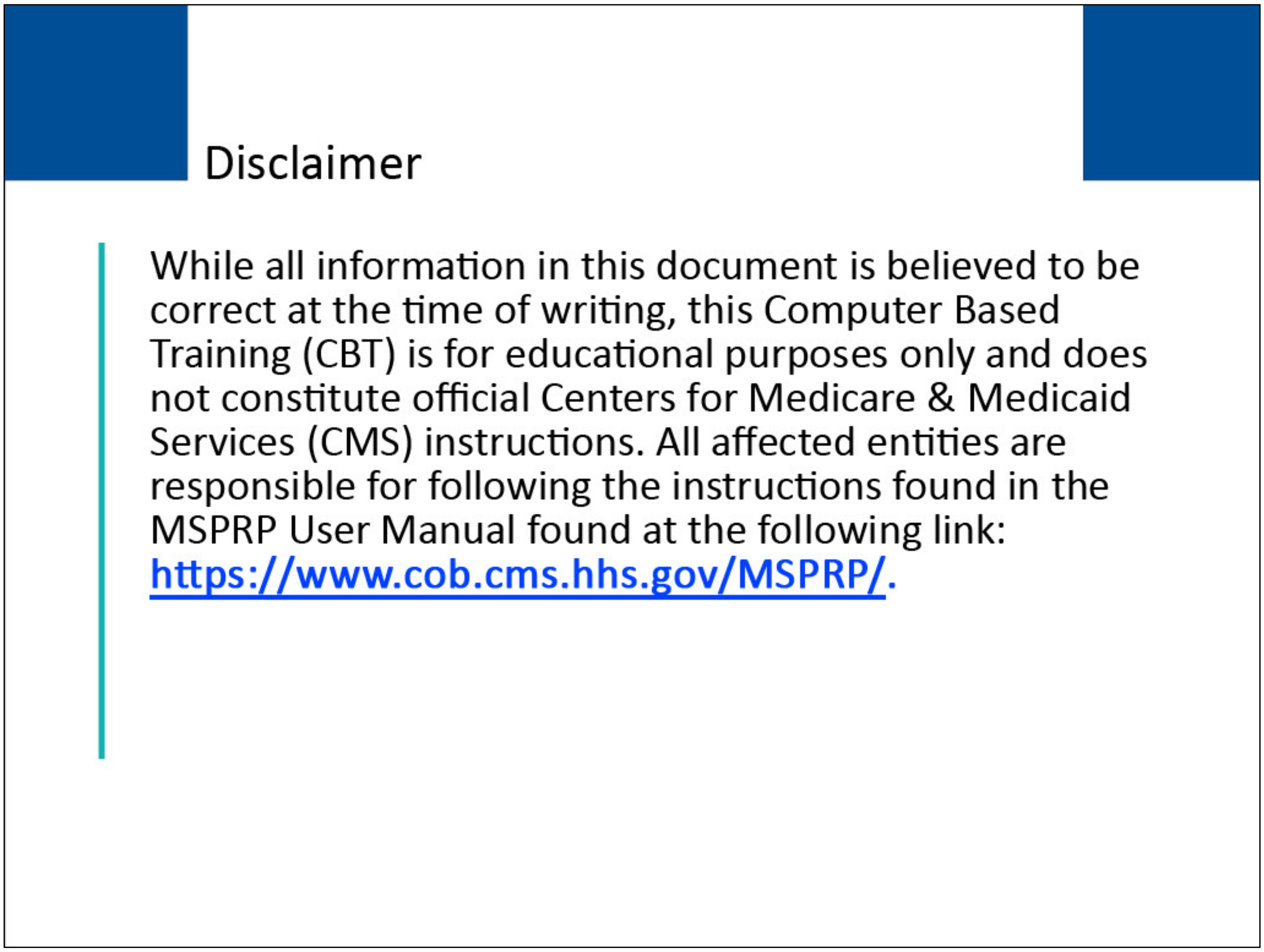
Slide notes

Welcome to the Medicare Secondary Payer Recovery Portal (MSPRP) Account Manager Basic Functions course.

Note: This module is intended for those entities who will register for a corporate account.

A corporate account type indicates that the entity has an Employer Identification Number (EIN) and will be regularly submitting MSPRP requests.

Slide 2 of 48- 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.

All affected entities are responsible for following the instructions found in the MSPRP User Manual found at the following link: https://www.cob.cms.hhs.gov/MSPRP/.

Slide 3 of 48- Course Overview

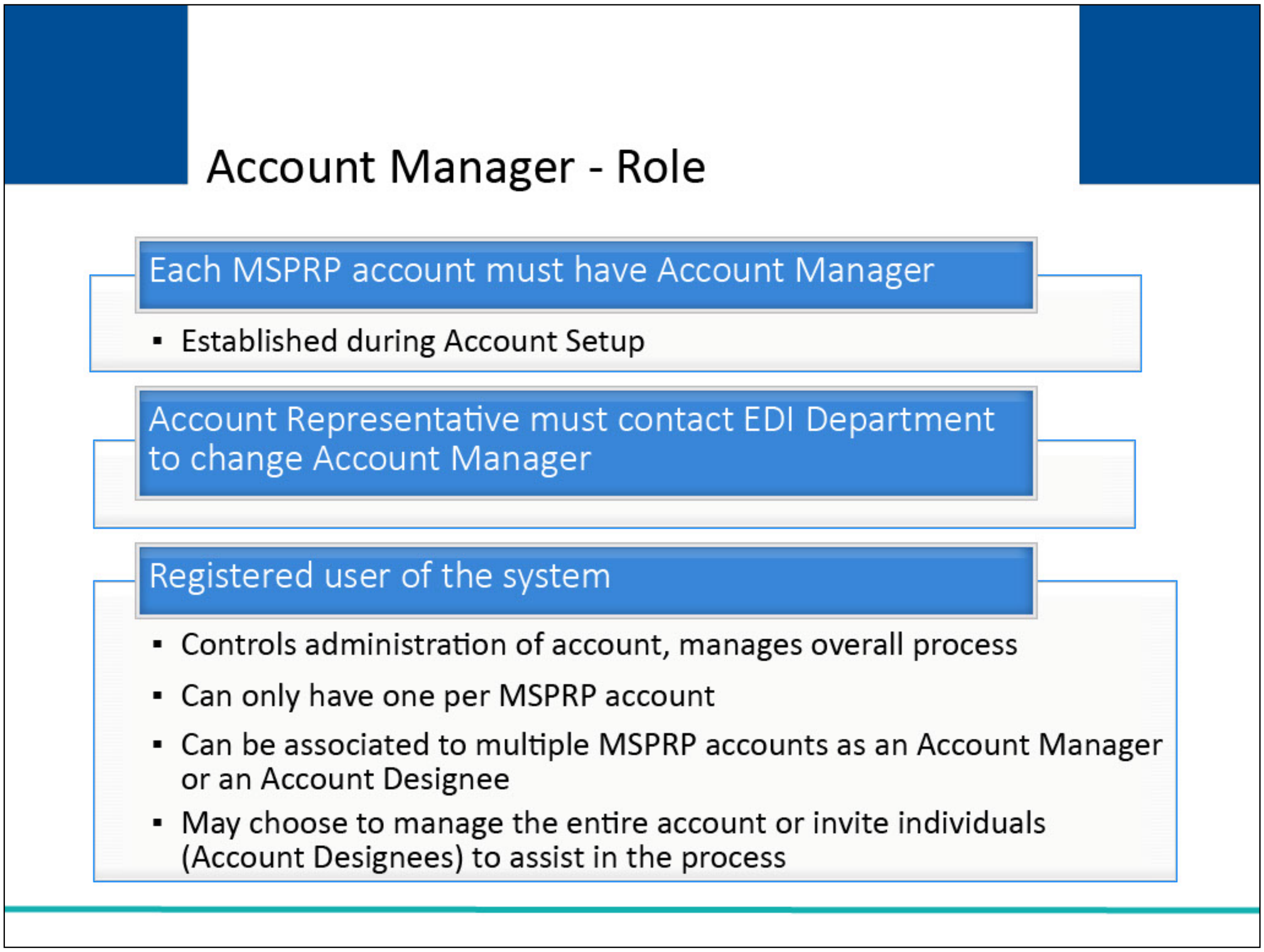
Course Overview

- Role of Account Manager
  - Paperless Options for Account Managers
- Basic Functions
  - Manage account
  - Account Designee maintenance

Slide notes

This course will explain the role of the Account Manager and how they will manage the account and perform Account Designee maintenance.

Slide 4 of 48- Account Manager Role



Slide notes

Each MSPRP account must have an assigned Account Manager. For Corporate and Representative account types, the Account Manager is assigned during the Account Setup process.

To replace an Account Manager, the Account Representative must contact the Electronic Data Interchange (EDI) Department.

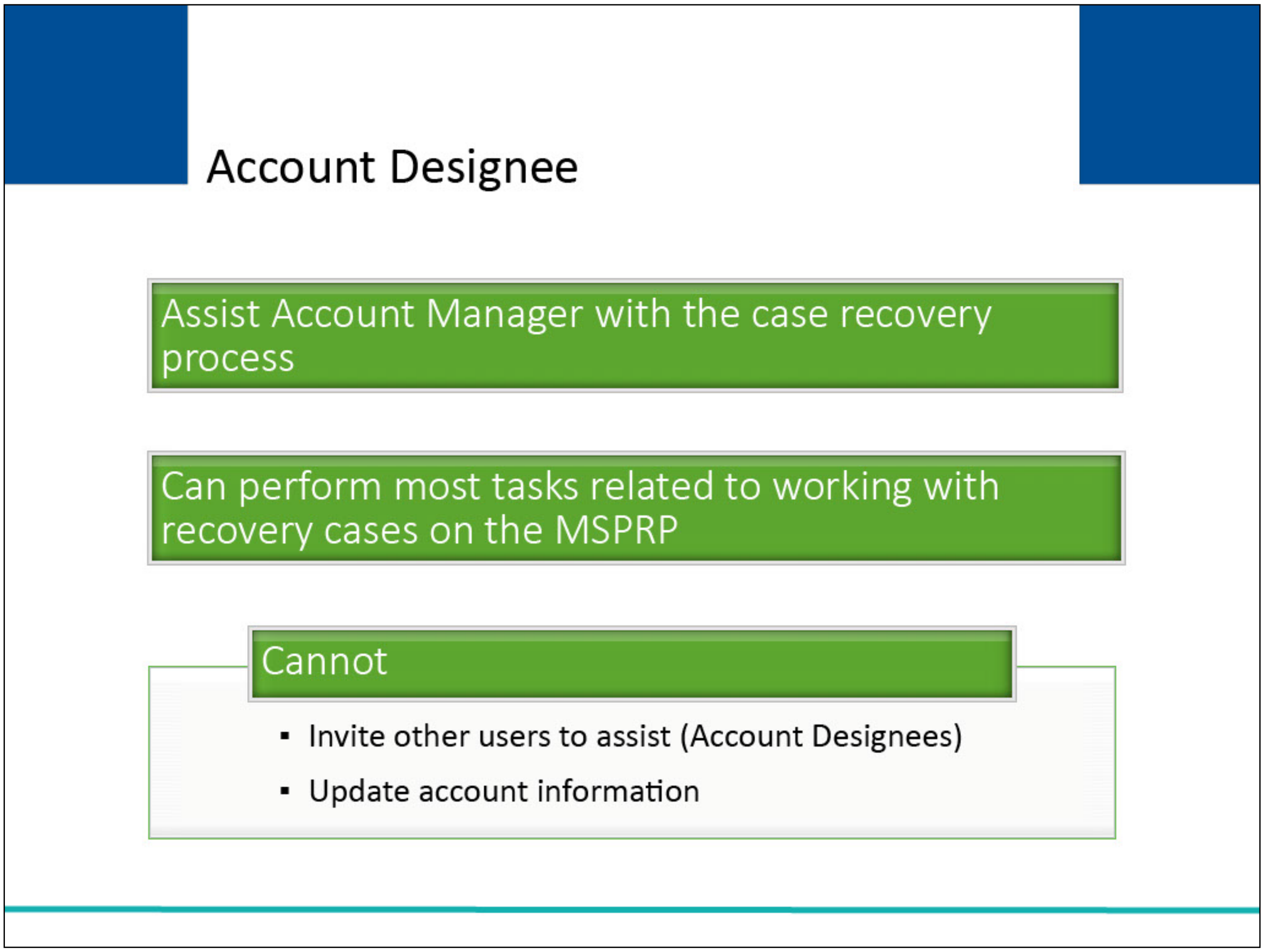
The Account Manager is a registered user of the system. This person controls the administration of an organization's account and manages the overall process.

Each MSPRP account can have only one Account Manager. For representative accounts, the Representative may also be the Account Manager.

The Account Manager can be associated to more than one MSPRP account as an Account Manager or an Account Designee.

The Account Manager may choose to manage the entire account by themselves or may invite other individuals (Account Designees) to assist in this process.

Slide 5 of 48- Account Designee

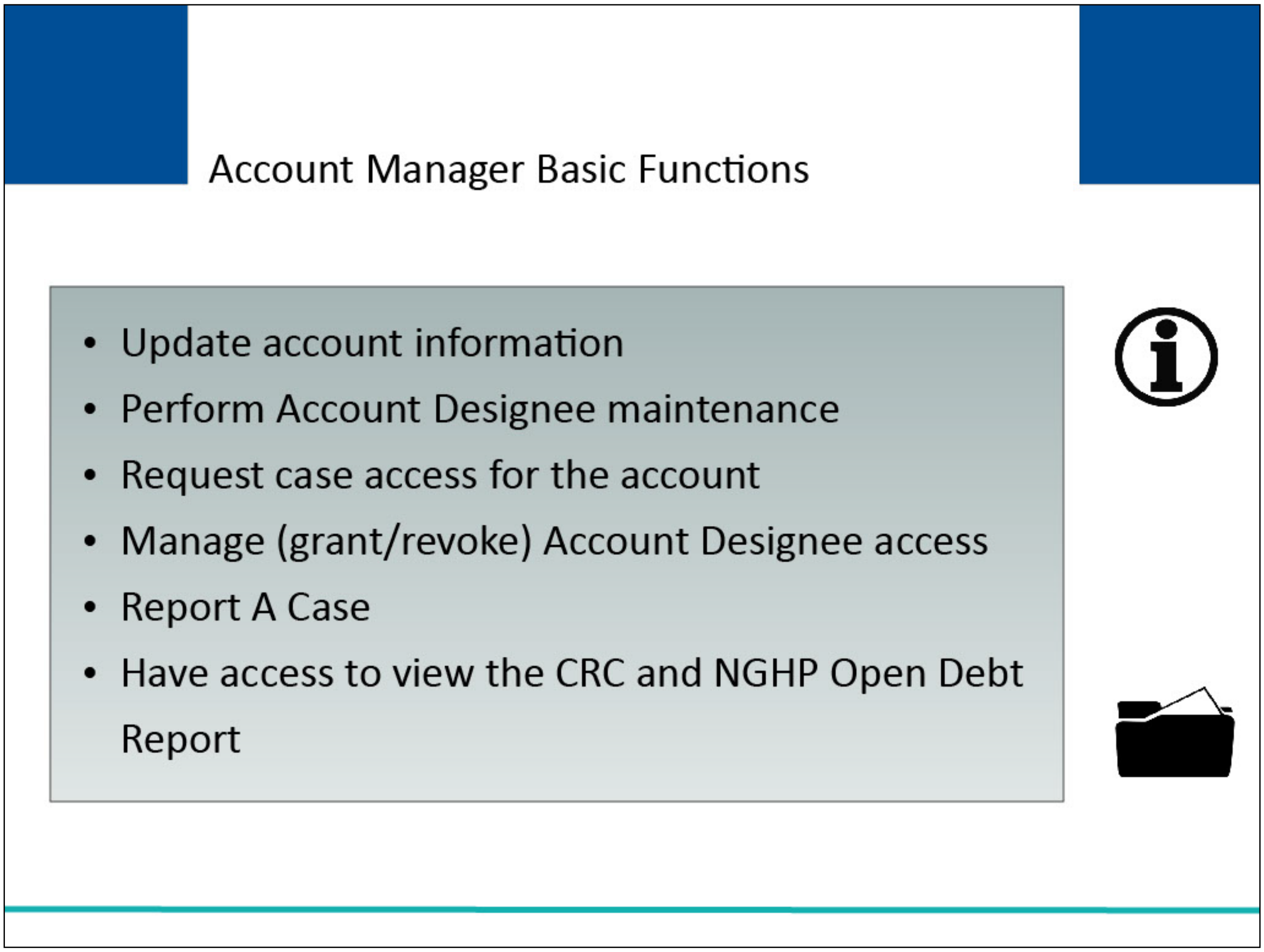


Slide notes

Account Designees assist the Account Manager with the case recovery process. They may perform most tasks related to working with recovery cases on the MSPRP.

However, Account Designees may not invite other users to assist as Account Designees and they cannot update general MSPRP account information.

Slide 6 of 48- Account Manager- Basic Functions



Slide notes

The Account Manager is responsible for updating general MSPRP account information and also performs the following Account Designee Maintenance functions:

update account information,

perform account designee maintenance,

request case access for the account,

manage (grant/revoke) account designee access,

report a case, and

have access to view the CRC and NGHP Open Debt Report.

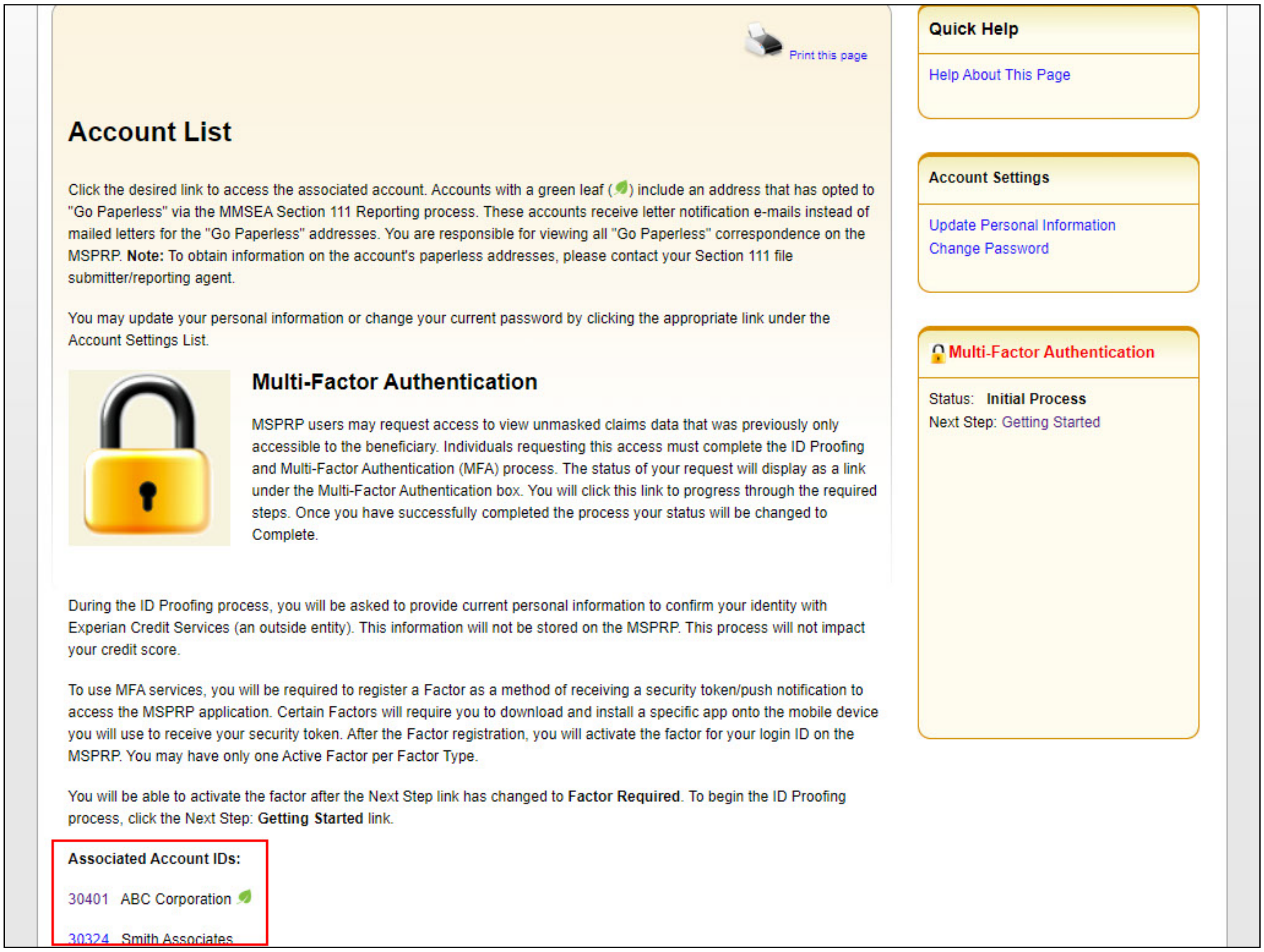
The Account Manager can request case access for the account and manage (grant/revoke) Account Designee access to a case. Once access has been granted to a case, the Account Designee can perform case recovery tasks on the MSPRP. If you are approaching settlement on a case that is not yet available on the MSPRP and you wish to initiate the Final CP process, you can add this case using the Report a Case link found on the MSPRP Welcome! Page.

Account Managers also have access to view the CRC NGHP Open Debt Report and update the email address for Go Paperless Letter Notifications

Note: Only those actions that are applicable to the case will be available. Additionally, some of these actions can only be performed if the proper authorization has been submitted and verified.

Please see the Requesting Authorization CBT for more information.

Slide 7 of 48- Account List Page



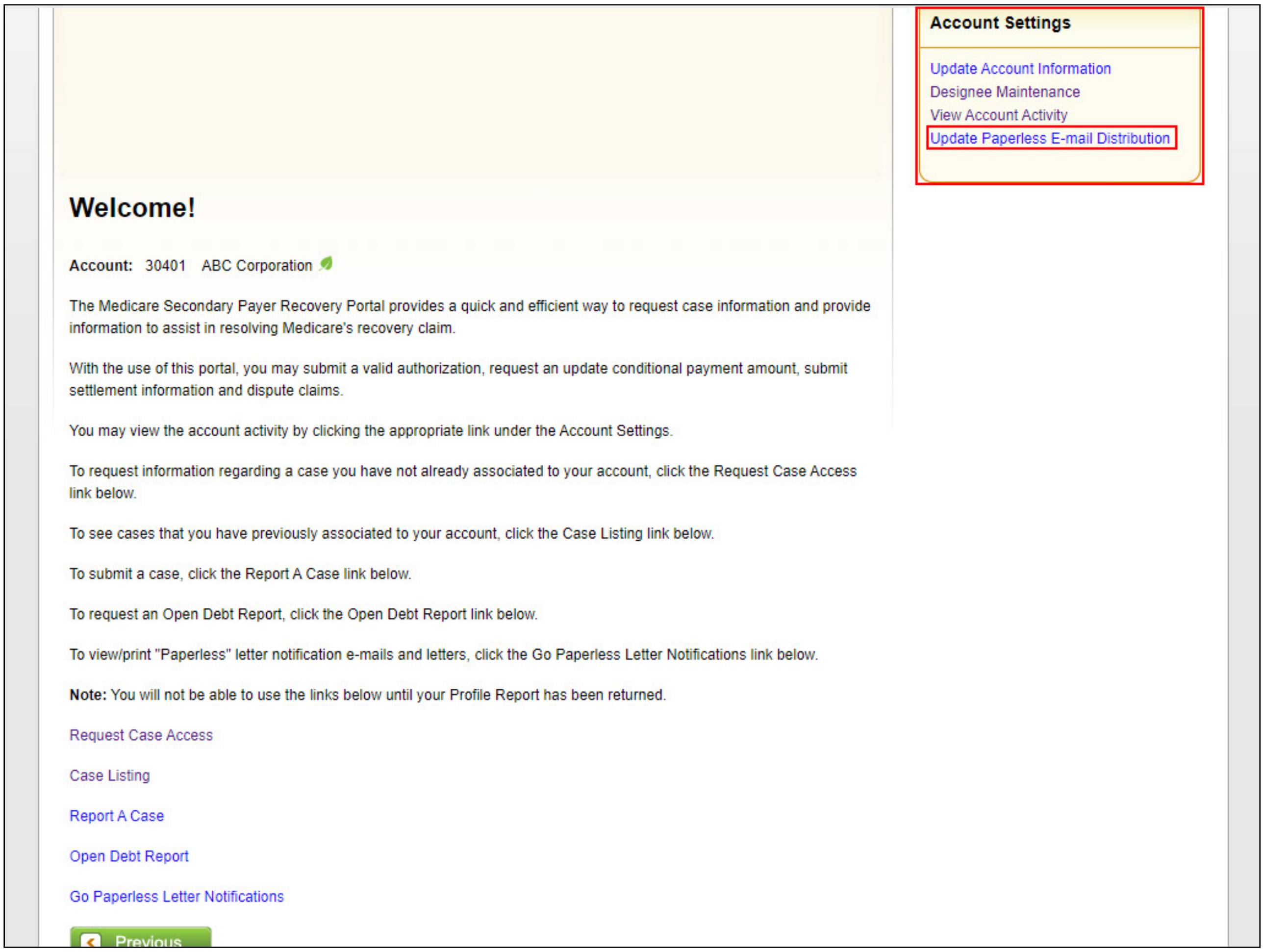
Slide notes

To access an MSPRP account, the Account Manager must first successfully login to the MSPRP application. After a successful login, the Account List page will appear. Click the desired link to access the associated account.

Note: The Account List Page now includes a “Go Paperless” (green leaf image) indicator next to the Account ID’s who have registered for the Go Paperless feature. These accounts receive letter notifications emails instead of mailed letters for the “Go Paperless” addresses.

Additionally, MSPRP users who are registered for both the MSPRP and CRCP systems can now initiate the ID proofing process on one application and then continue the process on the other. Once ID proofing is completed in one, users are automatically ID proofed in the other. Additionally, now that both applications support MFA and ID proofing, related references associated with only MSPRP have been changed to the more generic reference COBSW.

Slide 8 of 48- Welcome! Page



Slide notes

The Welcome! Page will appear including an Account Settings box. Account Manager's options in the Account Settings box include Updating Account Information, Designee Maintenance, View Account Activity, and Update Paperless Email Distribution.

If the Update Paperless notification Email Distribution link under Account Settings is selected, the Account Manager will be allowed to choose the Go Paperless option for the paperless email address if the account has not been registered to go paperless.

Slide 9 of 48 - Paperless E-mail Distribution Page

Slide notes

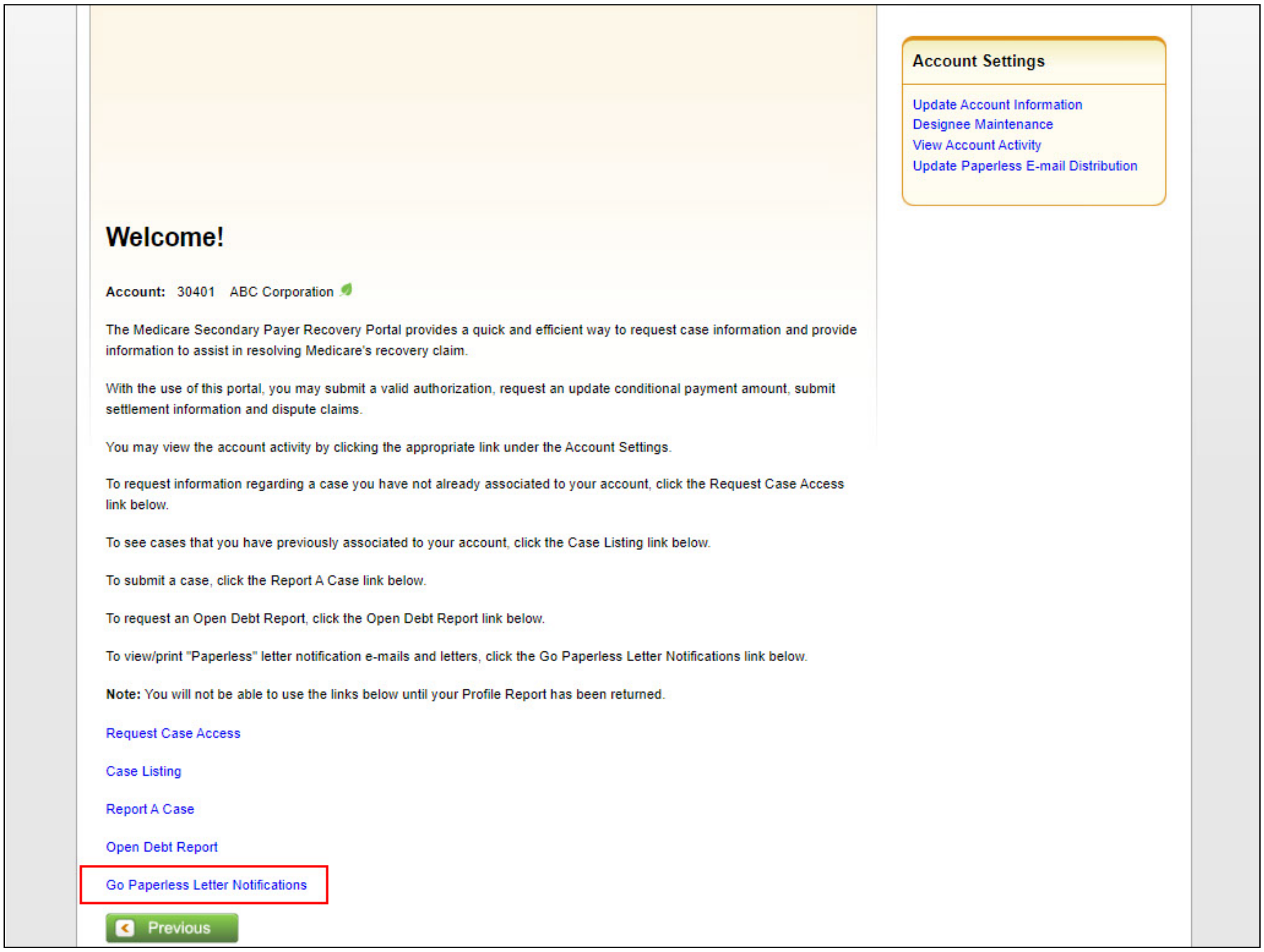
When the Update Paperless Email Distribution link is selected, the Paperless E-mail Address page for the account will appear and allow AM users for currently paperless accounts to add or update the Paperless E-mail Address for the account. Additionally, this allows AM users to specify whether ADs should be included as BCC recipients on the letter notification emails. The continue button saves the changes and sends a confirmation email.

Slide 10 of 48 - Paperless E-mail Distribution Confirmation Page

Slide notes

This Paperless Email Distribution Confirmation page confirms the users request to receive paperless emails. Selecting Continue on this page will return you back to the Welcome! Page.

Slide 11 of 48 - Welcome! Page - Go Paperless Letter Notifications



Slide notes

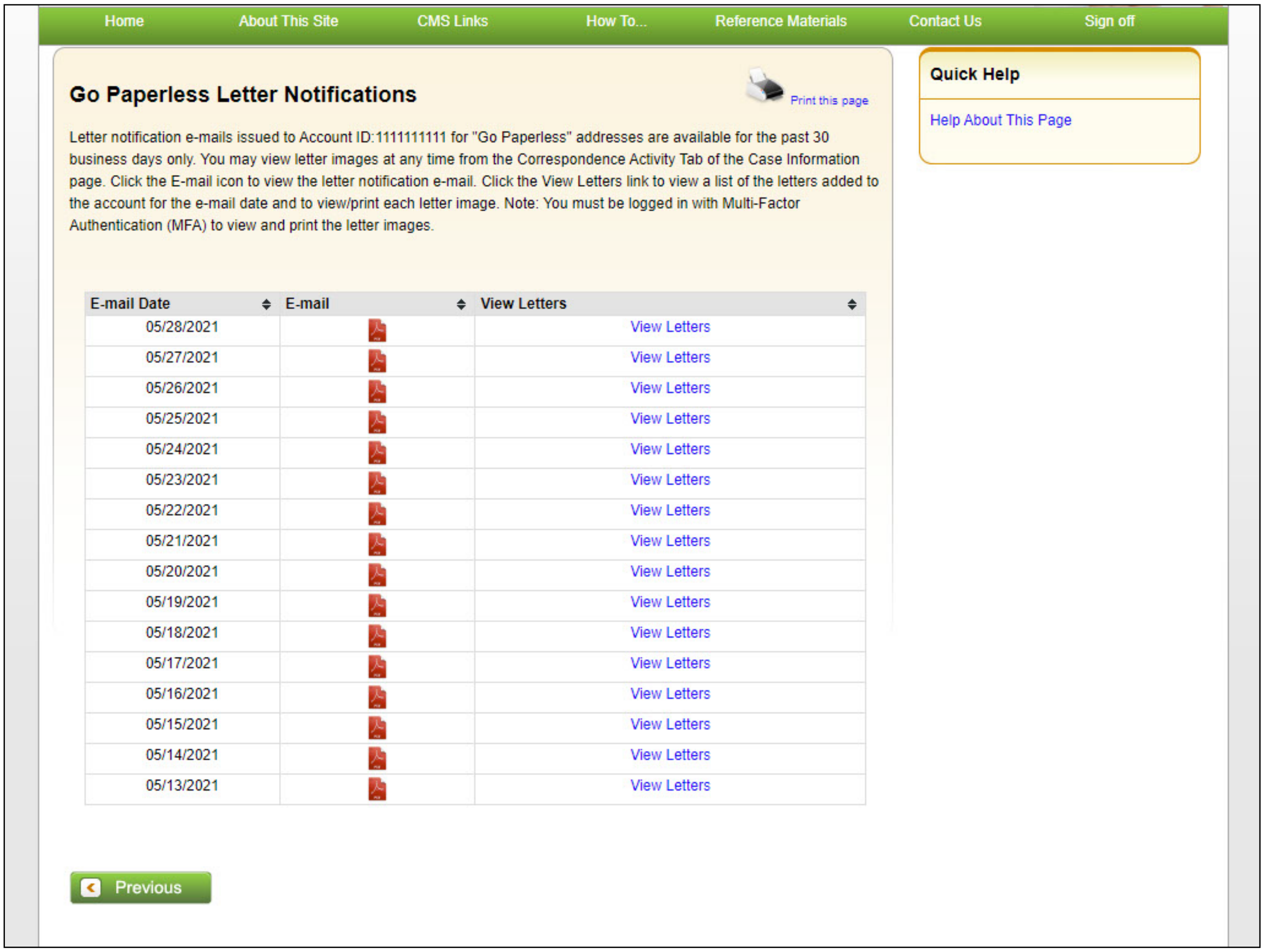
The Welcome! Page will appear.

If the Update Paperless notification Email Distribution link under Account Settings is selected, the Account Manager will be allowed to choose the Go Paperless Letter Notification option for the paperless email address if the account has not been registered to go paperless.

Note: The green leaf image next to the Account ID and Company name is a notification that the Account Manager can has already signed up to receive this account information via paperless communications.

Also, the Welcome Page now allows AMs and ADs to view letter notification emails and letters sent to the account within the last 30 business days for Go Paperless addresses using the new Go Paperless Letter Notifications link.

Slide 12 of 48 - Go Paperless Letter Notifications Page



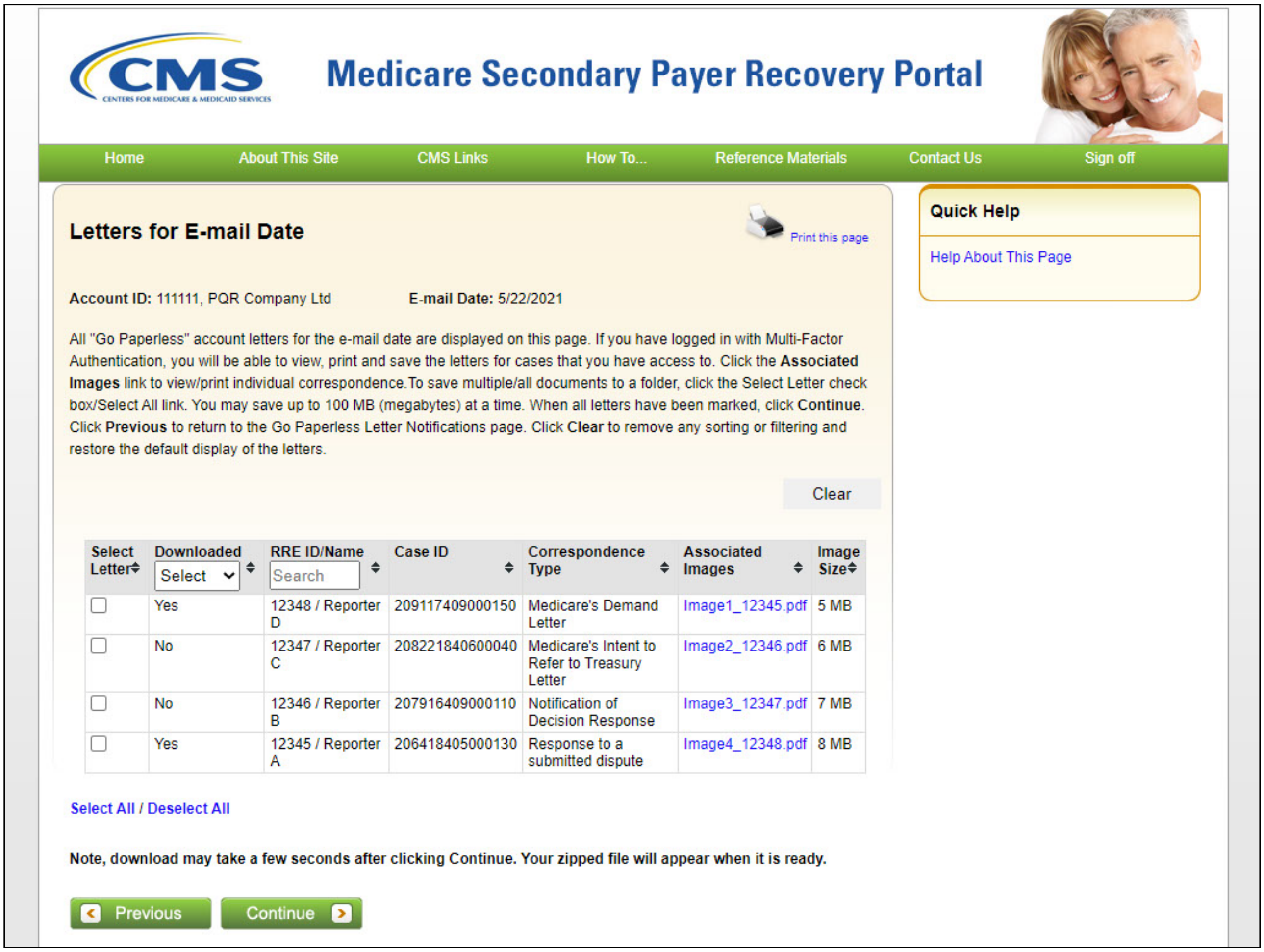
Slide notes

The Go Paperless Letter Notifications page will appear if you selected the corresponding link on the Welcome! Page. This page displays the list of letter notification email dates for accounts opted in to the Go Paperless option.

It allows users to view an image of the letter notification email for a selected date.

It also contains a “View Letters” link which navigates users to the new Letters for Email Date page for the selected email date.

Slide 13 of 48- Letter to E-mail Date Page


CMS CENTERS FOR MEDICARE & MEDICAID SERVICES

Medicare Secondary Payer Recovery Portal

Home | About This Site | CMS Links | How To... | Reference Materials | Contact Us | Sign off

Letters for E-mail Date

Print this page

Account ID: 111111, PQR Company Ltd **E-mail Date:** 5/22/2021

All "Go Paperless" account letters for the e-mail date are displayed on this page. If you have logged in with Multi-Factor Authentication, you will be able to view, print and save the letters for cases that you have access to. Click the **Associated Images** link to view/print individual correspondence.To save multiple/all documents to a folder, click the Select Letter check box/Select All link. You may save up to 100 MB (megabytes) at a time. When all letters have been marked, click **Continue**. Click **Previous** to return to the Go Paperless Letter Notifications page. Click **Clear** to remove any sorting or filtering and restore the default display of the letters.

Clear

Select Letter	Downloaded (Select)	RRE ID/Name (Search)	Case ID	Correspondence Type	Associated Images	Image Size
☐	Yes	12348 / Reporter D	209117409000150	Medicare's Demand Letter	Image1_12345.pdf	5 MB
☐	No	12347 / Reporter C	208221840600040	Medicare's Intent to Refer to Treasury Letter	Image2_12346.pdf	6 MB
☐	No	12346 / Reporter B	207916409000110	Notification of Decision Response	Image3_12347.pdf	7 MB
☐	Yes	12345 / Reporter A	206418405000130	Response to a submitted dispute	Image4_12348.pdf	8 MB

Select All / Deselect All

Note, download may take a few seconds after clicking Continue. Your zipped file will appear when it is ready.

Previous | Continue

Quick Help

Help About This Page

Slide notes

If you click the View Letters link, the Letters for Email Date page displays a list of paperless correspondence for the account on the selected email date

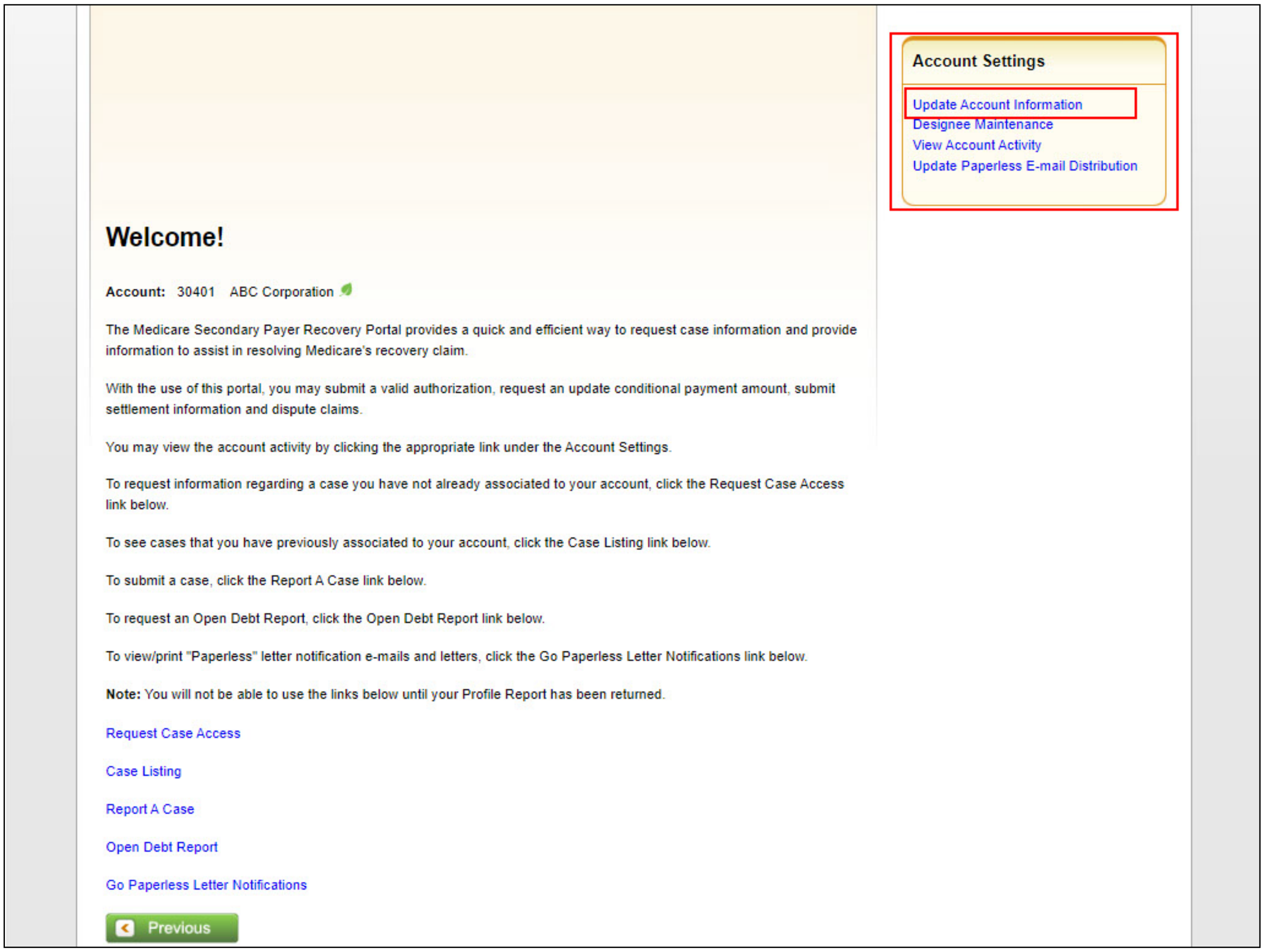
This page allows users logged in with Multi-Factor Authentication (MFA)to view the associated image for each letter individually, or

you can select multiple letters to view by clicking the boxes on the far left under Select the letter you would need to review, then click the Continue button to create a zipped file that you can open or save to a folder.

The file will open in a new window, and you can simply close the window when you are finished. You will remain on the Letters for Email Date page. Clicking Previous will take you back to the Go Paperless Letters Notifications Page. You can click Previous again from the Go Paperless Letter Notifications page to return to the Welcome! Page. Click Clear to remove any sorting or filtering and restore the default display of letters. Note: Non-MFA users will have access to this page but will have the option to view the associated images.

Once you have viewed the letter in the second window, you can return to MSPRP and select continue to return to the Welcome page.

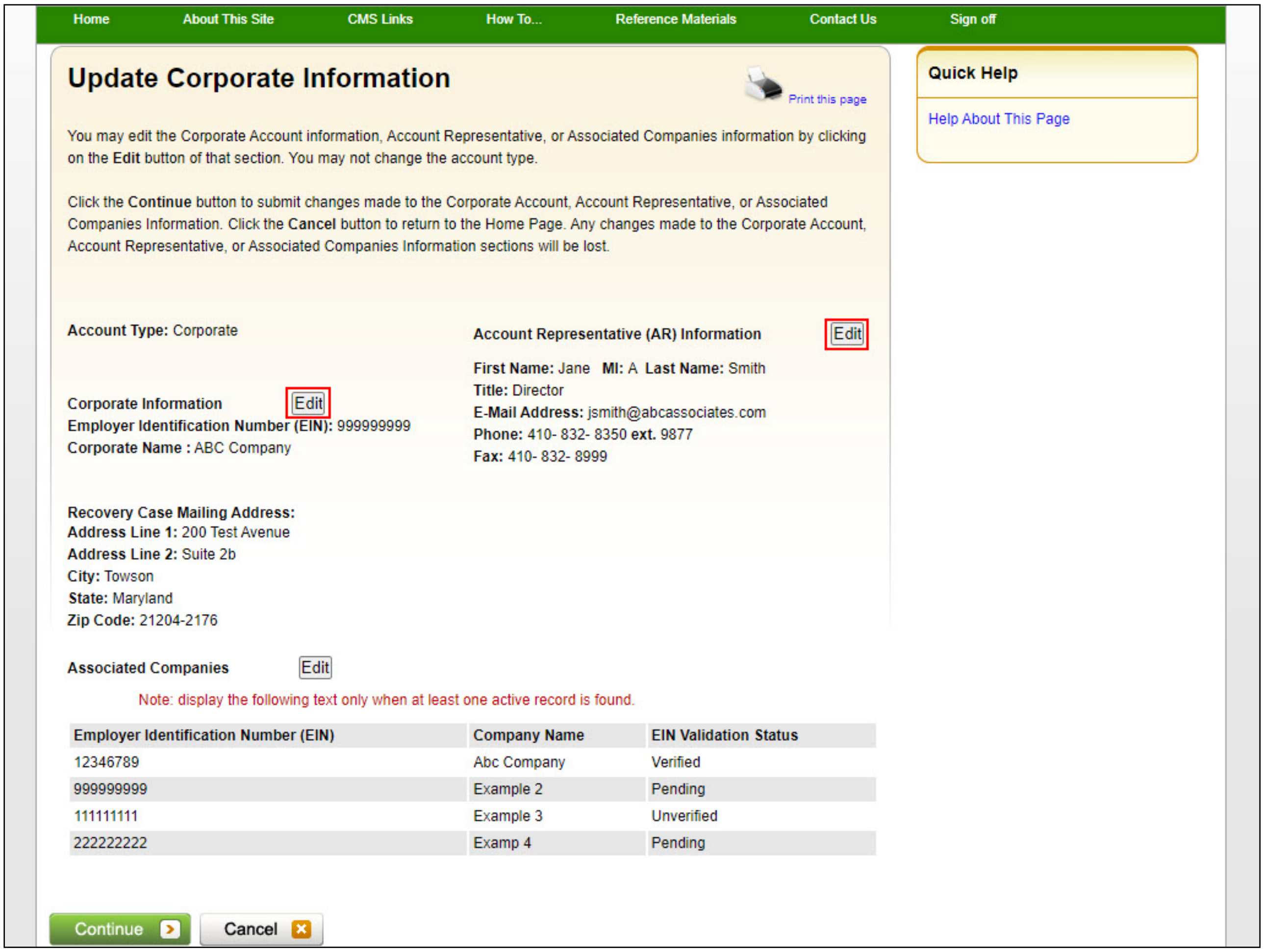
Slide 14 of 48 - Welcome! Page



Slide notes

The Welcome page will appear. To revise account information, the Account Manager will click [Update Account Information] in the Account Settings box.

Slide 15 of 48 - Update Corporate Information Page



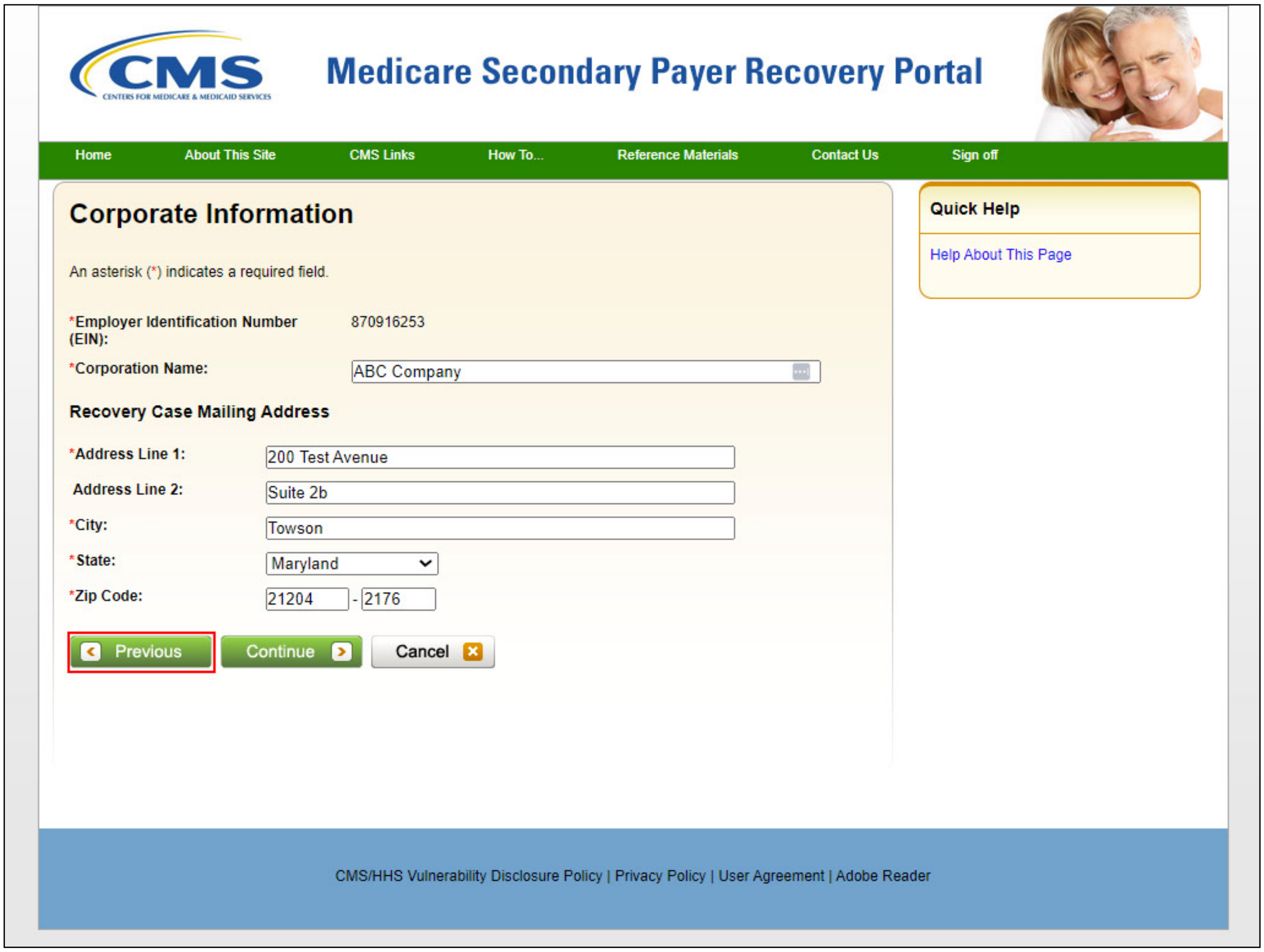
Slide notes

The Update Information page will appear. The one pictured here, Update Corporate Information page, is what will display for corporate users.

This page lists the Corporate Information, Recovery Case Mailing Address, and Account Representative (AR) information. The Update Information screens for Representative account types are very similar and function the same way.

To make any corrections, click the [Edit] button next to the corresponding section.

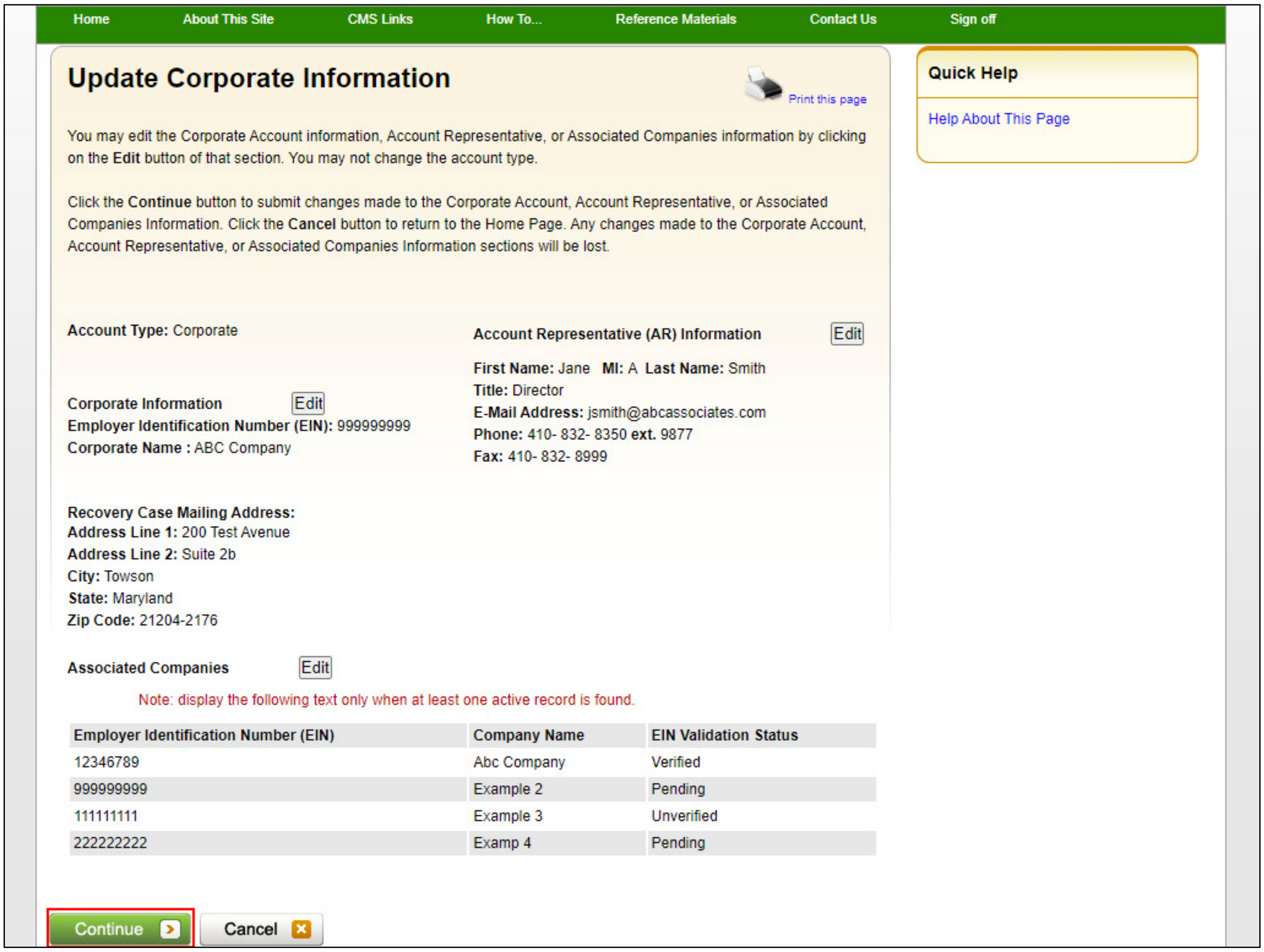
Slide 16 of 48 - Corporate Information Page



Slide notes

This will direct you to the applicable page to make updates. Once you have completed making your corrections, click [Continue]. You will be returned to the Update Corporate Information page.

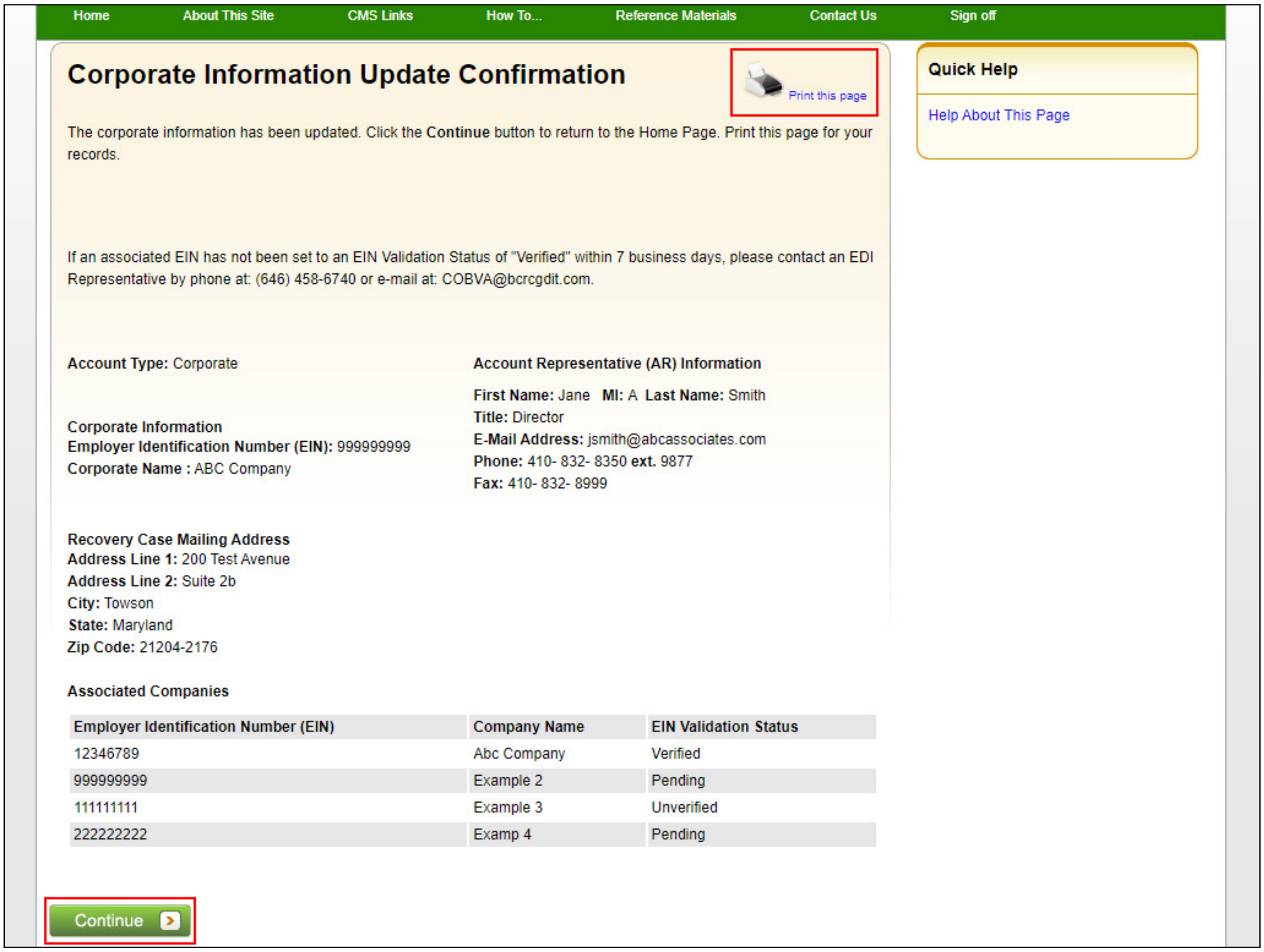
Slide 17 of 48 - Update Corporate Information Page



Slide notes

After you have returned to the Update Information page, click [Continue].

Slide 18 of 48 - Update Corporate Information Confirmation Page

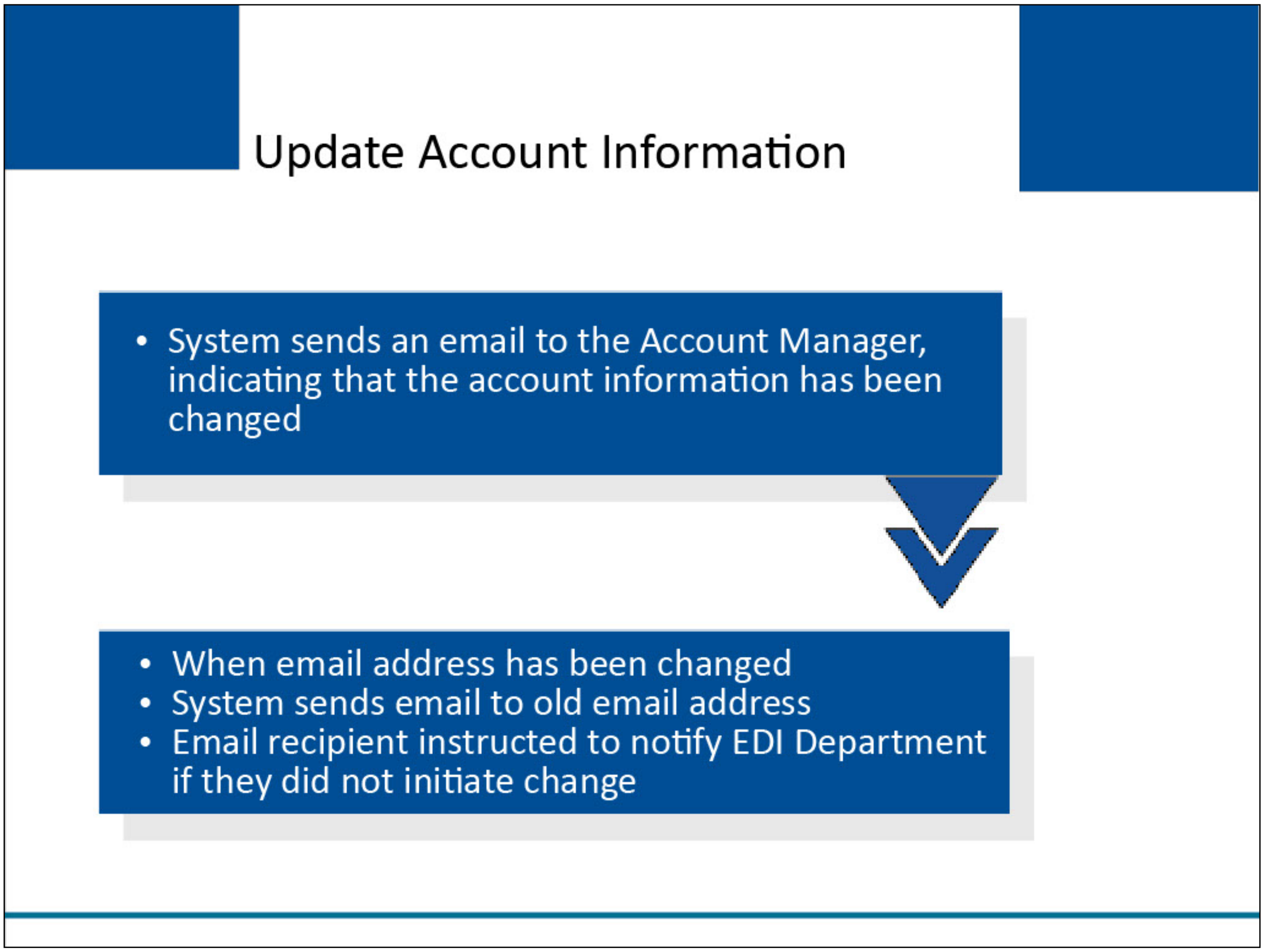


Slide notes

Next, the system will display the Update Corporate Information Confirmation page, showing the updated information.

You may print this page for your records. Click [Continue] to submit the changes and return to the MSPRP Home page.

Slide 19 of 48 - Update Account Information



Slide notes

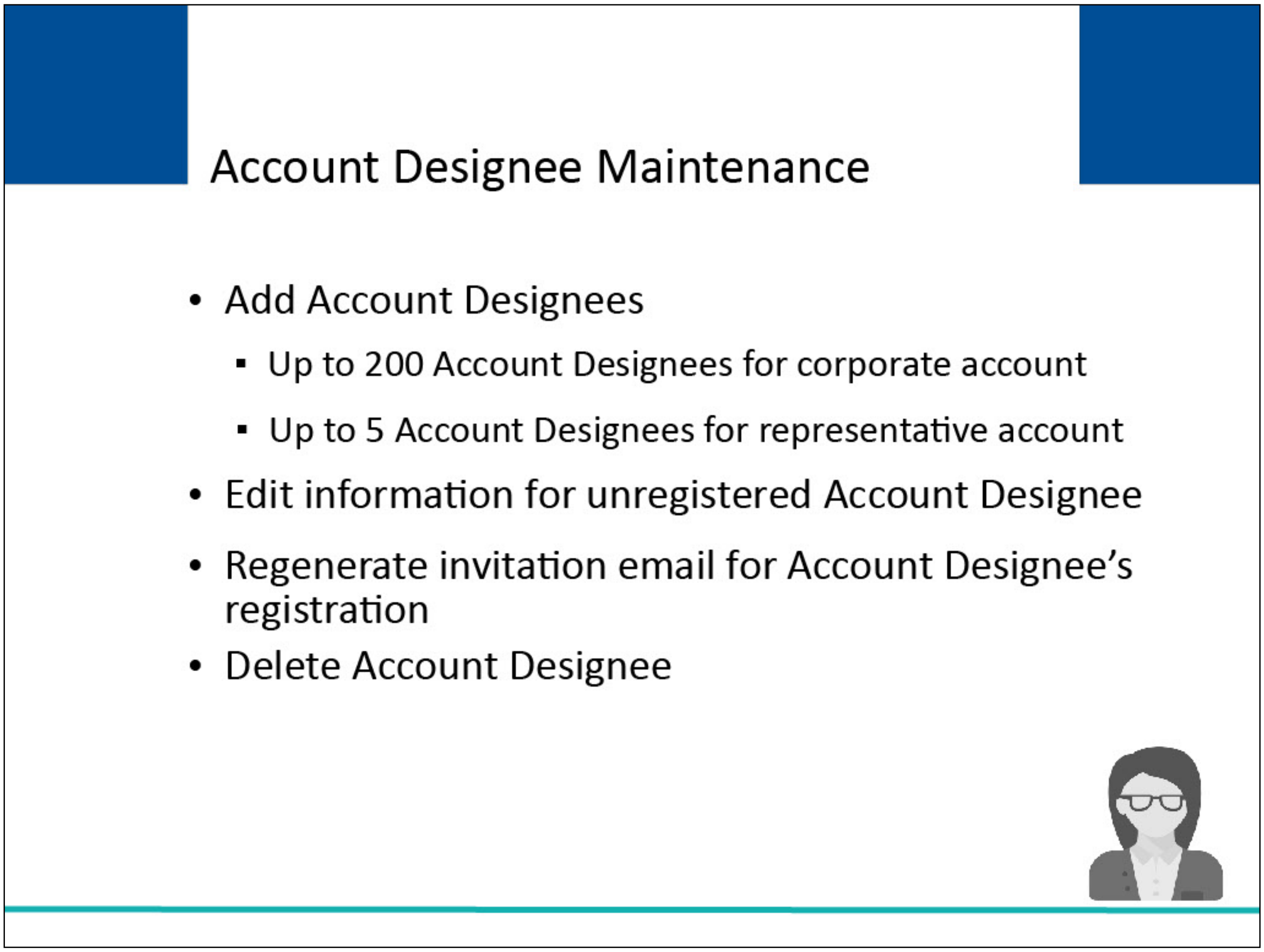
With the exception of a modification to an email address, the system will send an email to the Account Manager indicating that the account information has been changed.

The Account Manager will be instructed to notify the EDI Department if they did not initiate the update.

When an email address has been changed, the system will send an email to the old email address stating that an email address change has been requested.

The email recipient will be instructed to notify the EDI Department if they did not initiate the email address change.

Slide 20 of 48 - Account Designee Maintenance



Slide notes

The Account Manager may designate one or more Account Designees to assist with case management. The number of Account Designees associated with one MSPRP account is dependent on the account type.

Corporate accounts may have up to 200 Account Designees. Representative accounts may have up to five. The Account Manager can perform the following Account Designee maintenance functions:

add an Account Designee

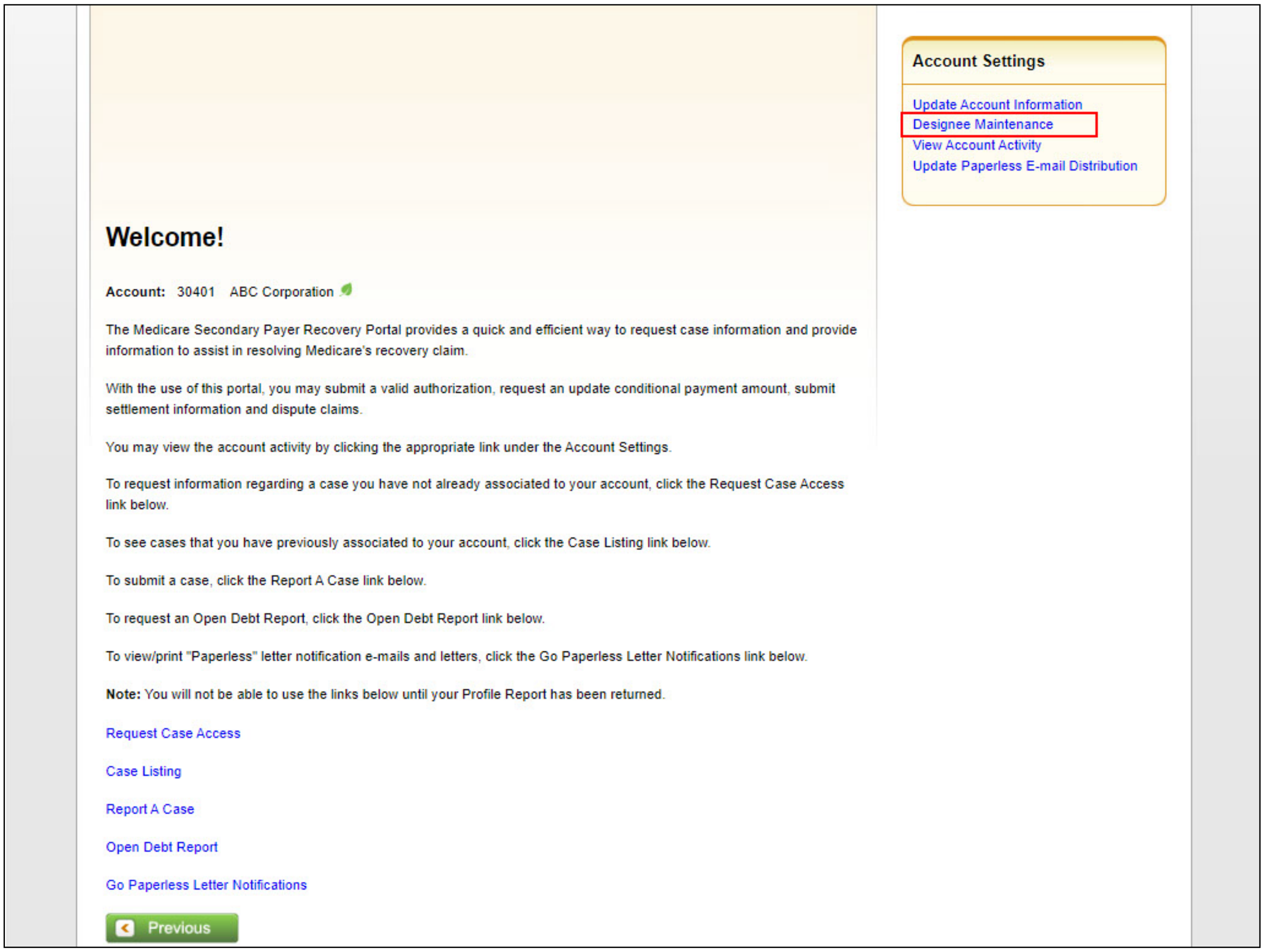
edit information for an unregistered Account Designee

regenerate an invitation email with a token link for an Account Designee's registration

delete an Account Designee

Note: To change the role of an Account Designee on an existing account to an Account Manager, the Account Representative can contact their EDI representative by phone at 646-458-6740 or by email at: COBVA@bcrcgdit.com for assistance.

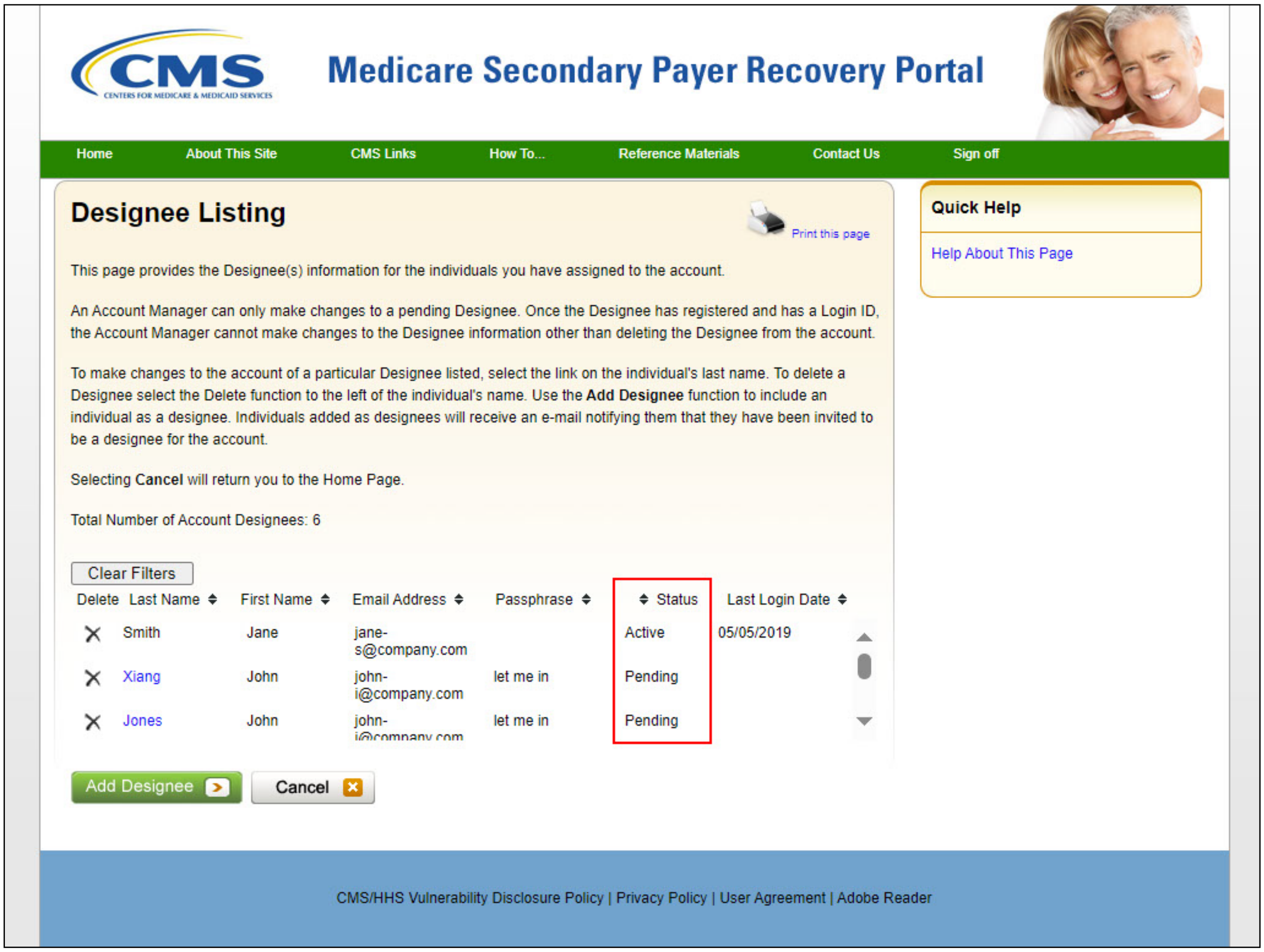
Slide 21 of 48 - Welcome! Page - Designee Maintenance



Slide notes

To manage Account Designees, click [Designee Maintenance] from the Account Settings menu on the Welcome! Page.

Slide 22 of 48 - Designee Listing Page



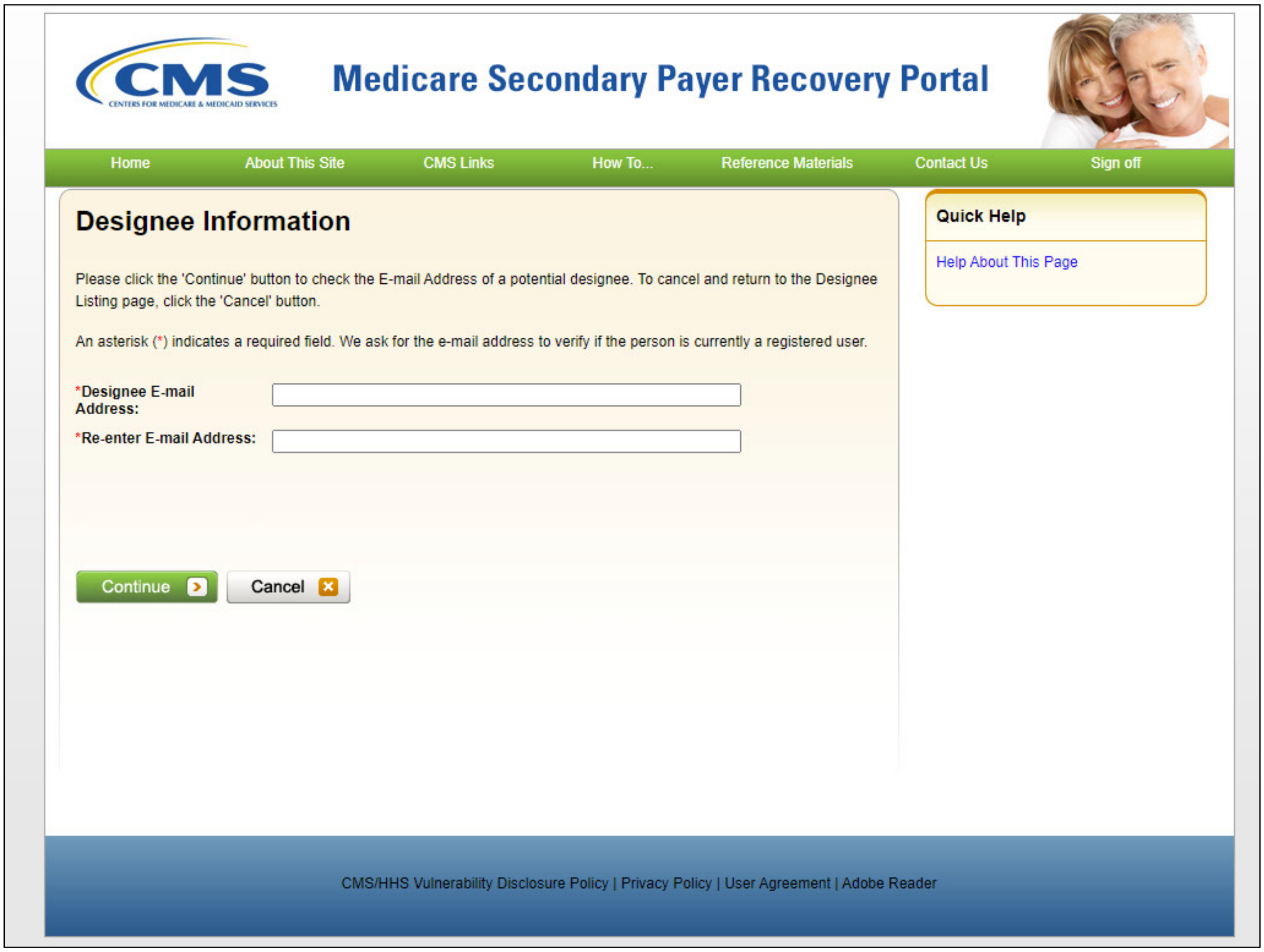
Slide notes

The Designee Listing page will appear. All Account Designees and their associated statuses (Pending, Active, Locked, Expired, Revoked) will be listed.

You can click the Last Name column header to search by last name, the Status, and Last Login Date column headers to sort and filter the designees.

To add a potential Account Designee, the Account Manager must first invite them. To initiate this process, click [Add Designee].

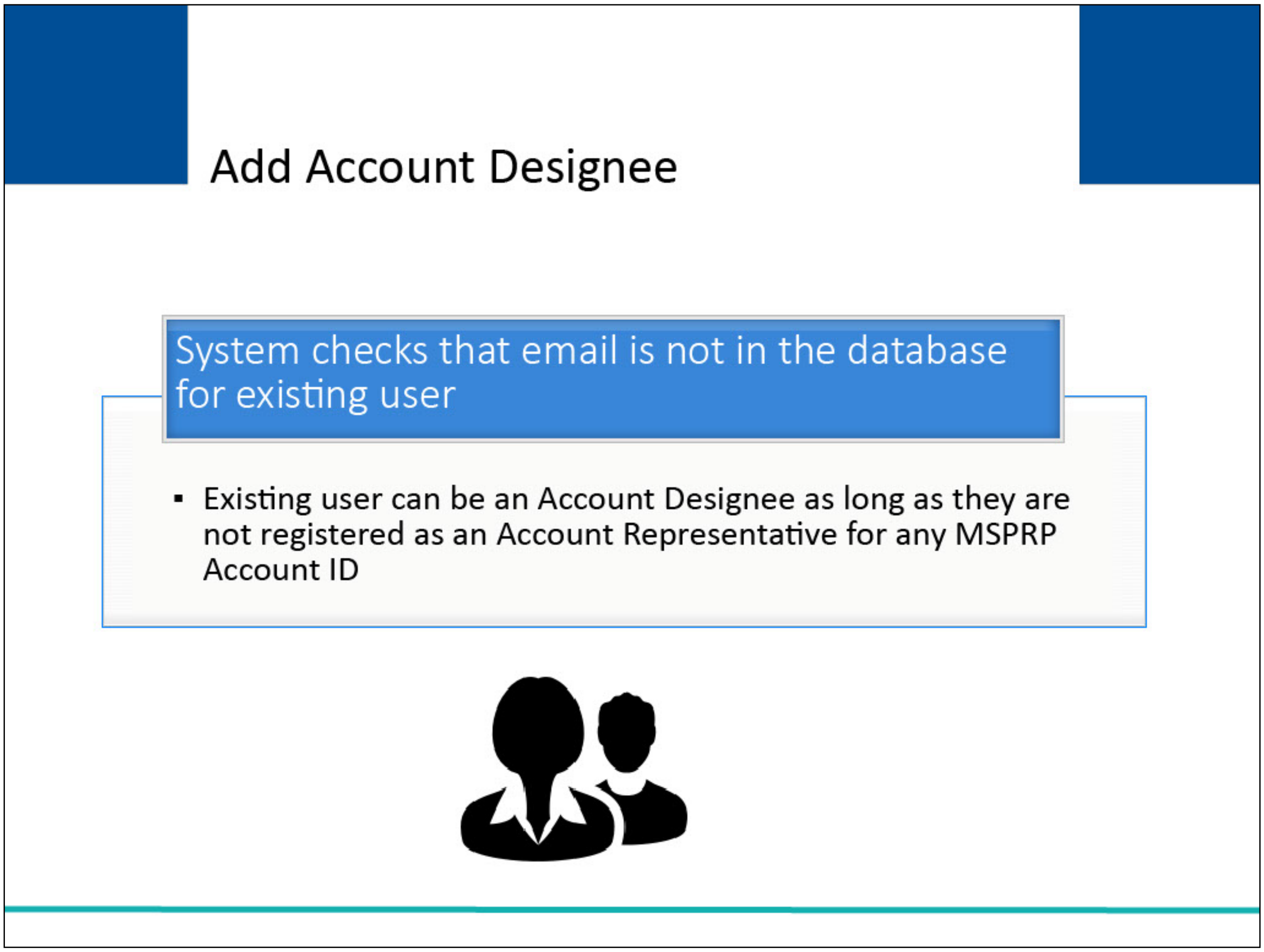
Slide 23 of 48 - Designee Information Page



Slide notes

The Designee Information page will appear. Enter and re-enter the email address of the Account Designee you wish to invite and click [Continue].

Slide 24 of 48 - Add Account Designee



Slide notes

The system will check that the entered email address is not in the MSPRP system for an existing MSPRP user. An existing, registered user can be an Account Designee for your Account ID as long as they are not already registered as an Account Representative for any MSPRP Account ID or as an Account Manager for this Account ID. Note: The Account Designee can be an Account Manager or an Account Designee on another account.

Slide 25 of 48 - Designee Invitation Page

Slide notes

If the entered email address is found in the system (i.e., the invited Account Designee is already a registered user), the Designee Invitation page appears with the Designee First and Last Name fields pre-populated based on the email address that was entered on the Designee Information page.

The Account Manager must verify and confirm that the information entered is for the correct Account Designee.

If the email address is not found in the system, the Account Manager must enter the first and last name for the Account Designee, and create a Passphrase (a short, case-sensitive phrase, up to 30 characters).

The Passphrase is entered twice. Do not cut and paste this information. The Account Manager must contact their Account Designee and provide them with the Passphrase.

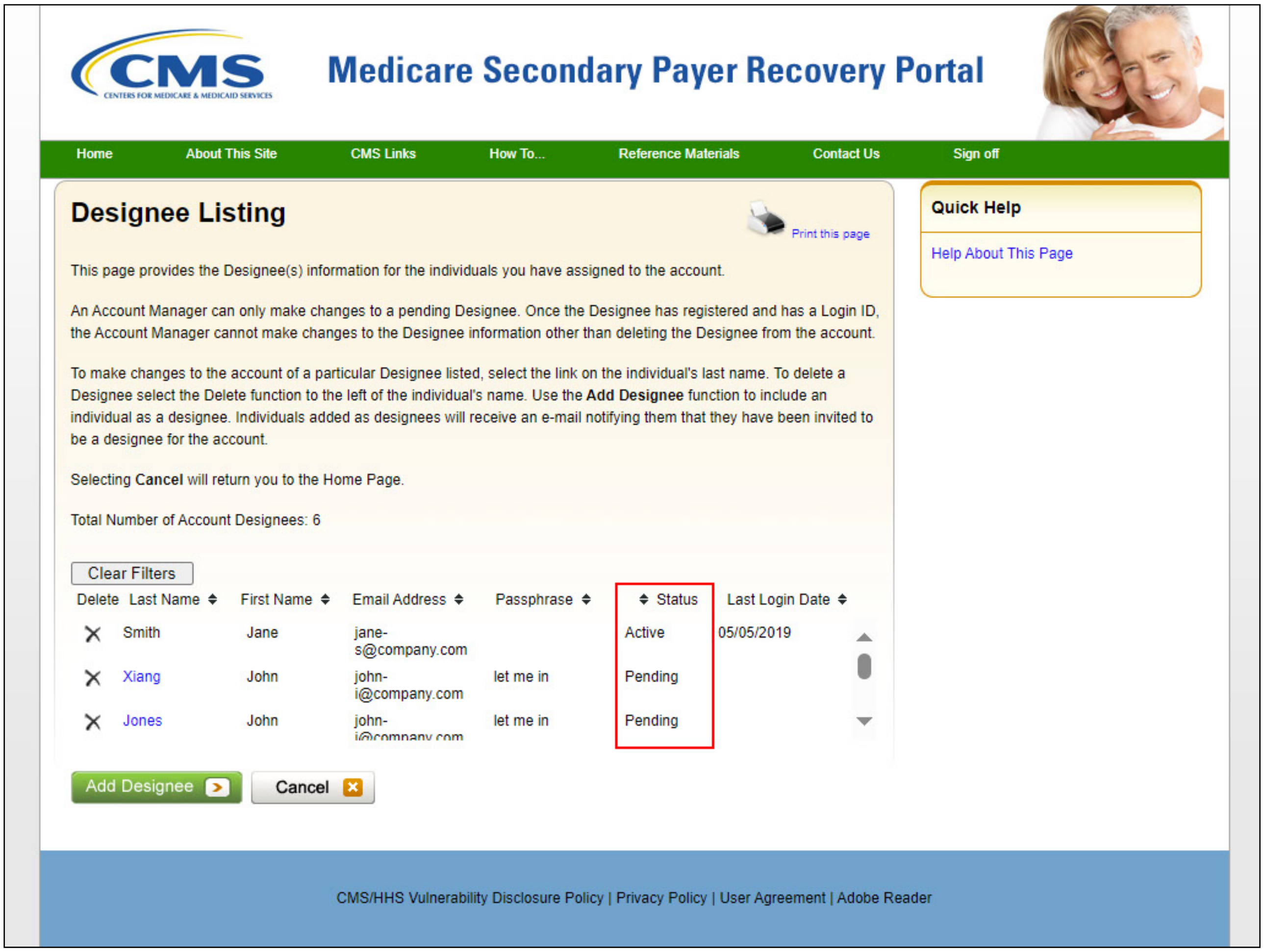
The Account Designee will need this passphrase in order to register. Click [Continue] to proceed.

Slide 26 of 48 - Designee Confirmation Page

Slide notes

The Designee Confirmation page will appear. This page confirms that the Account Designee has been invited to the account. Click [Continue].

Slide 27 of 48 - Designee Listing Page

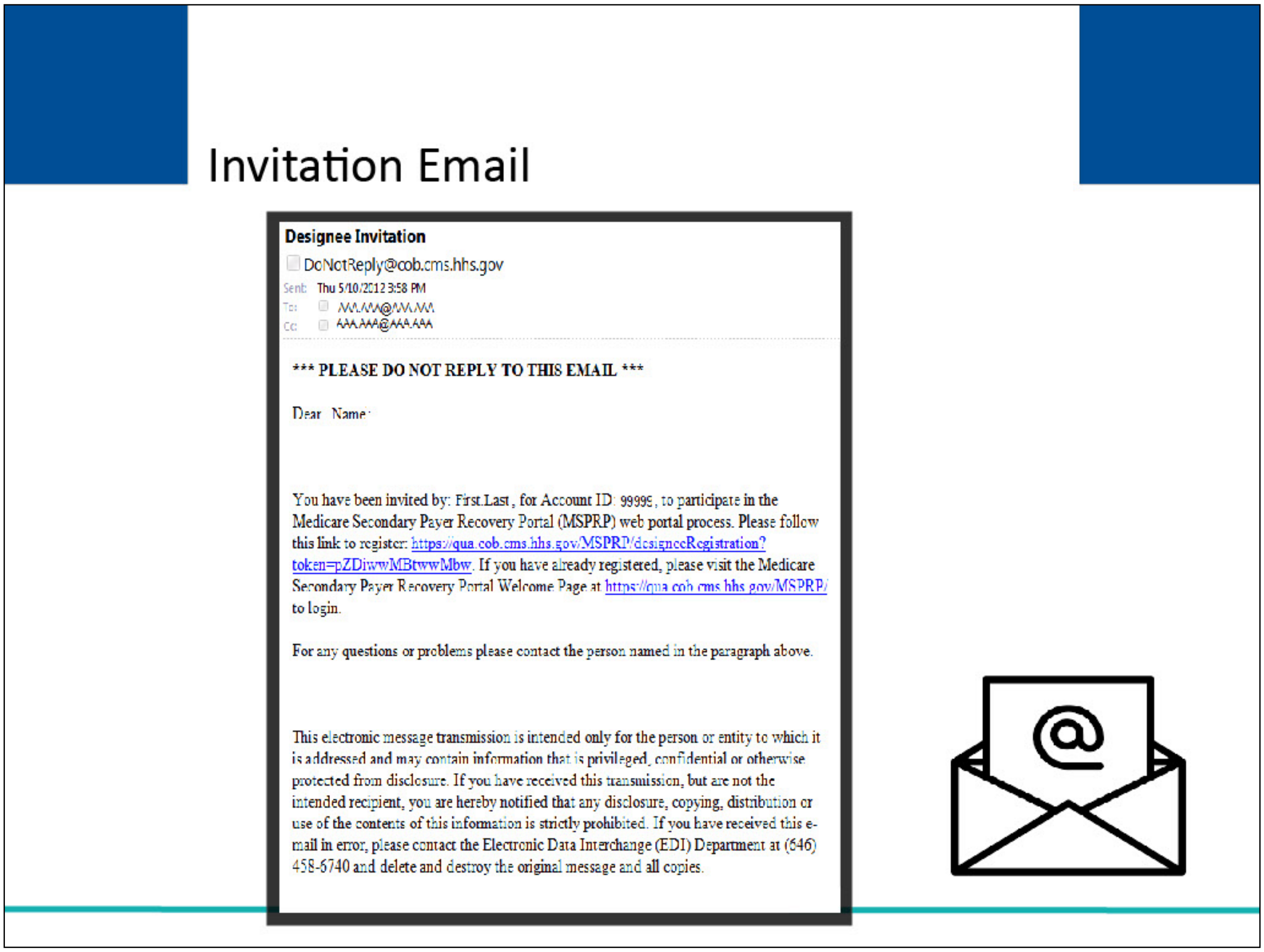


Slide notes

The Designee Listing page will re-appear. If the entered email address was found in the system (i.e., the invited Account Designee is already a registered user),

the Account Designee will be listed with an ‘Active’ Status. If the email address was not found in the system, the Account Designee is listed with a status of ‘Pending.’

Slide 28 of 48 - Invitation E-mail



Slide notes

Once the invitation process is complete, the individual being invited as an Account Designee will receive an email notifying them that they have been invited to be an Account Designee for the account.

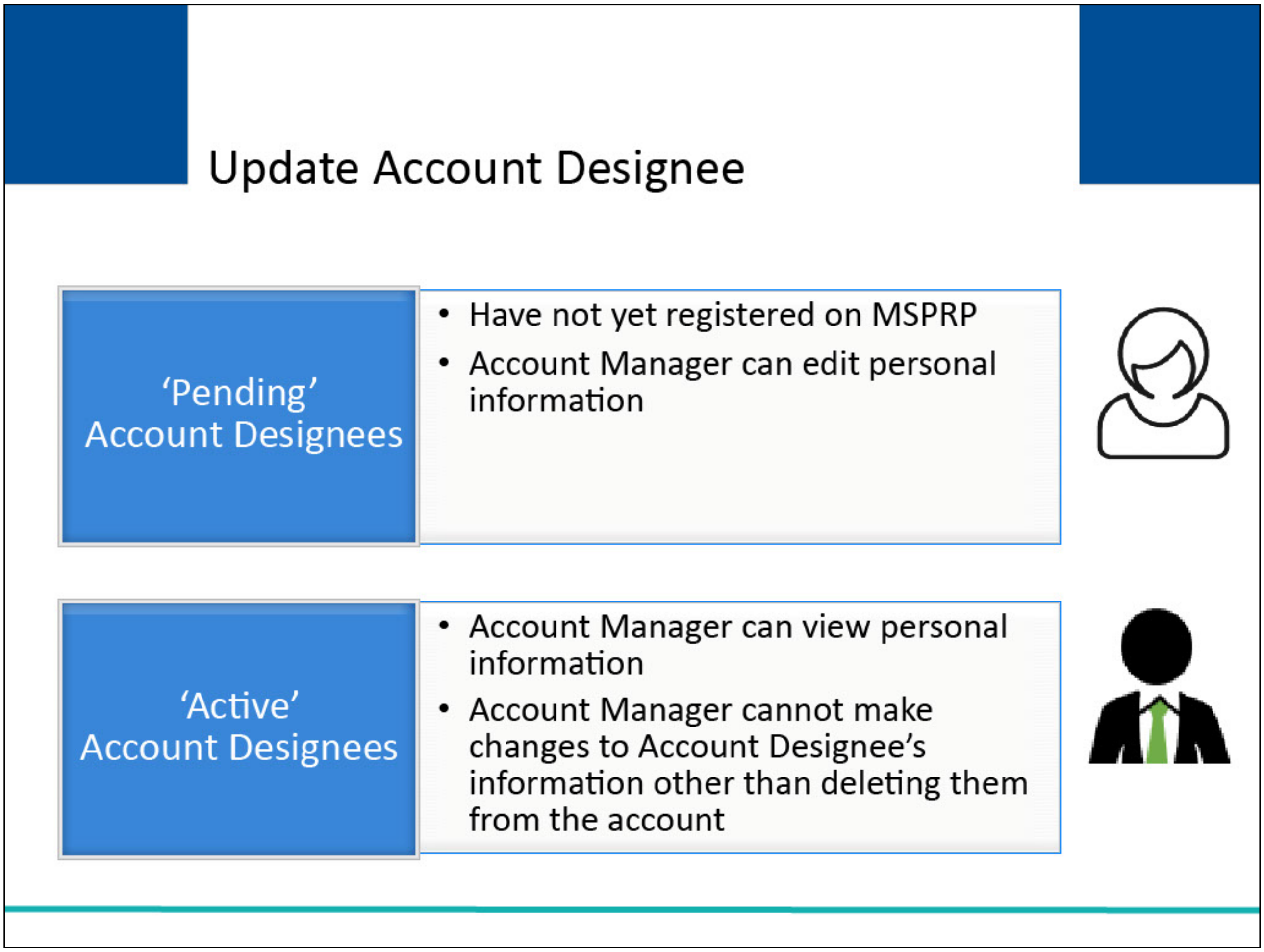
If the Account Designee is an existing user (i.e., the invited Account Designee is a registered user of the Section 111 Coordination of Benefits Secure Website (COBSW), Workers' Compensation Medicare Set-Aside Portal (WCMSAP),

Commercial Repayment Center Portal (CRCP), and/or the MSPRP as an Account Designee or Account Manager for another Account), they may log into the MSPRP and complete tasks related to the MSPRP account.

If the Account Designee is not an existing user, they must click on the link provided in the email and enter the Passphrase that the Account Manager provided them with in order to successfully register for the MSPRP.

Once the registration has been completed, the Account Designee will be able to access the MSPRP account.

Slide 29 of 48 - Update Account Designee



Slide notes

Account Designees in "Pending" status have not yet registered on the MSPRP. An Account Manager can edit personal information for Account Designees in "Pending" status.

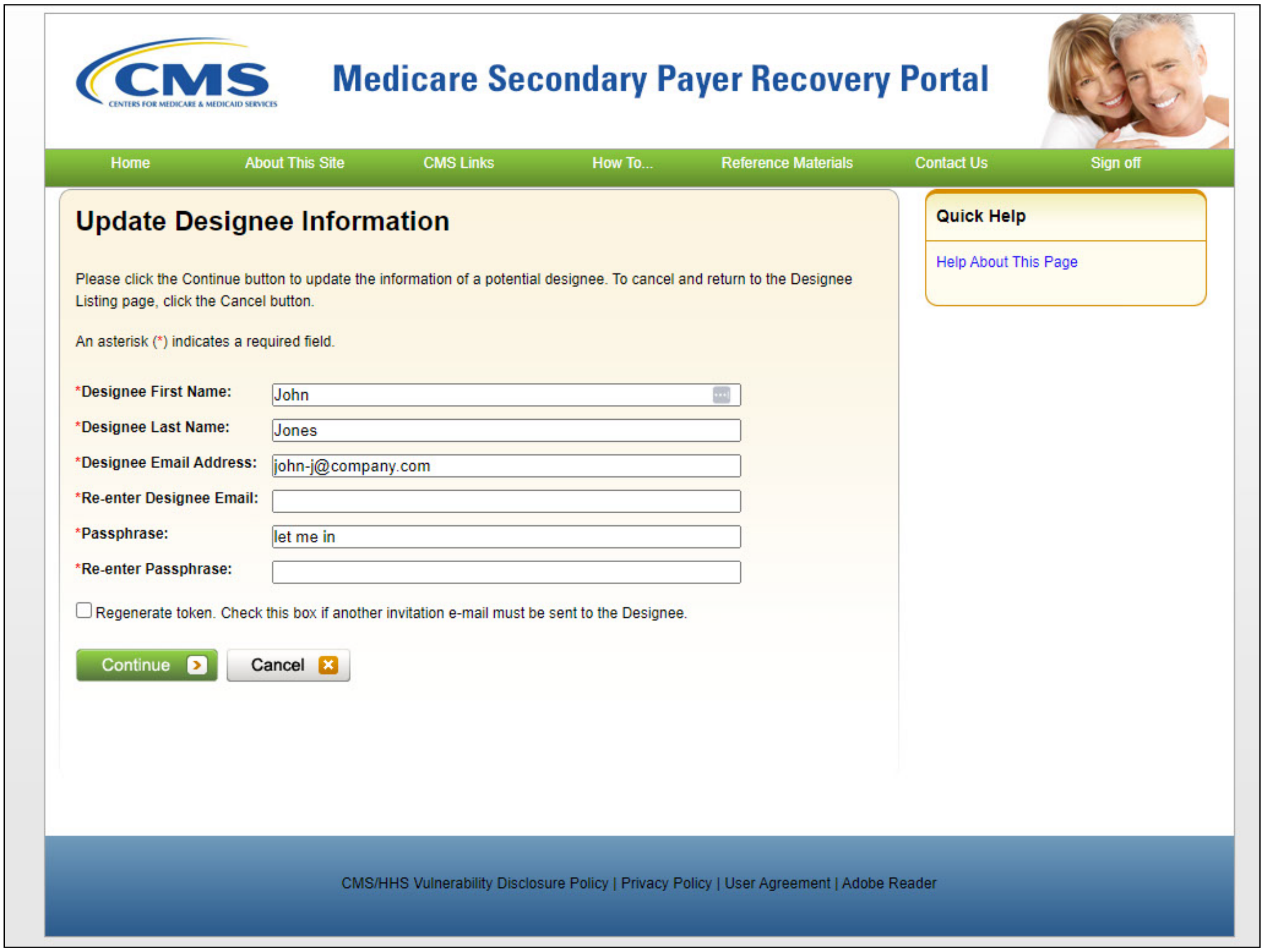
Account Managers can only view personal information for Account Designees in "Active" status. Once the Account Designee has registered and has a Login ID, the Account Manager cannot make changes to the Account Designee's information other than deleting the Account Designee from the account.

Slide 30 of 48 - Designee Listing Page

Slide notes

To make changes to the account of a particular Account Designee in ‘Pending’ status, click the last name of the Account Designee whose information you wish to update.

Slide 31 of 48 - Update Designee Information Page



Slide notes

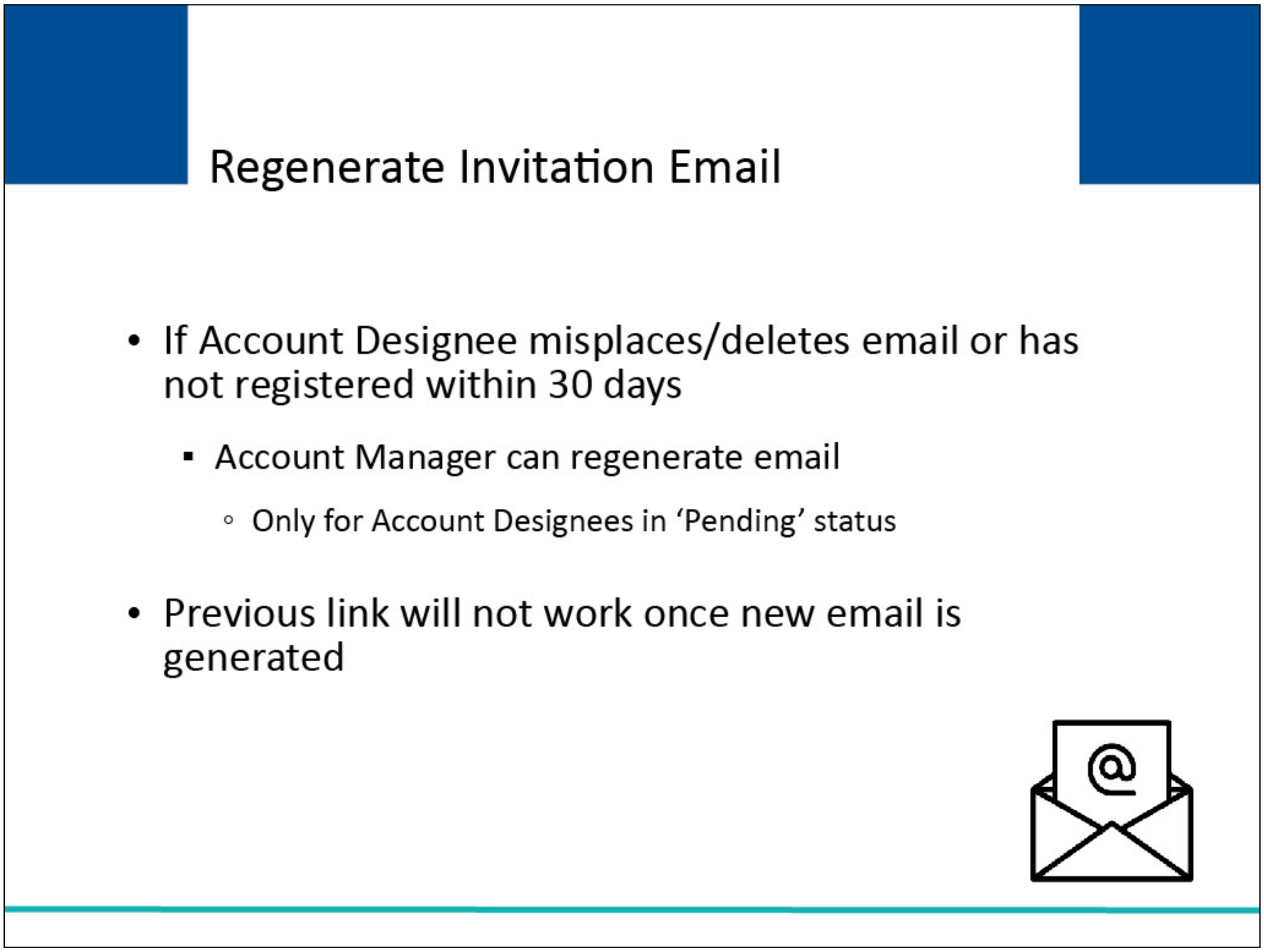
The Update Designee Information page appears with the Account Designee's personal information open for editing. Edit the Account Designee's information as needed. Click [Continue].

Slide 32 of 48 - Designee Update Confirmation Page

Slide notes

The Account Designee’s personal information is updated and the Designee Update Confirmation page appears.

Slide 33 of 48 - Regenerate Invitation Email

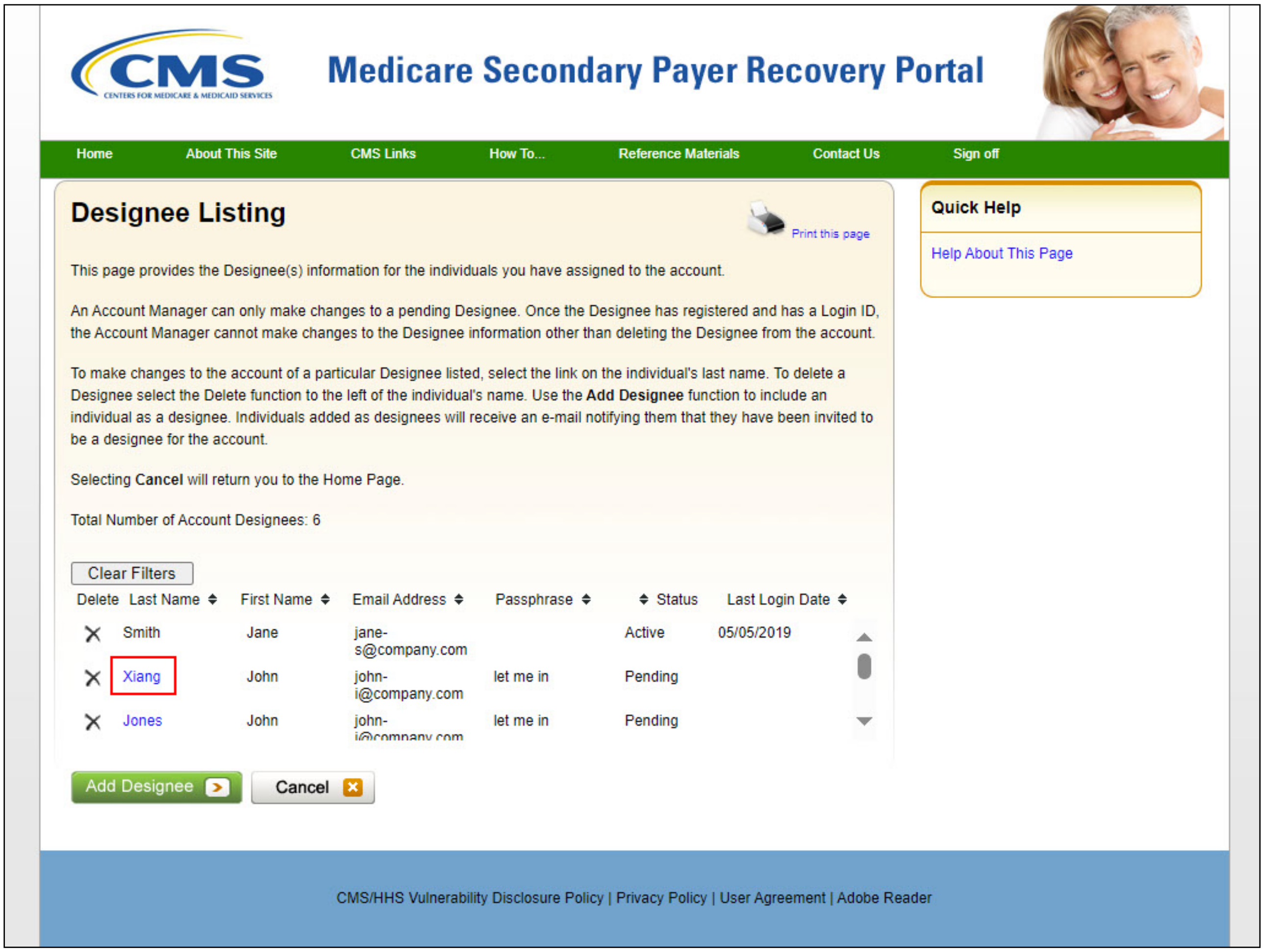


Slide notes

If the intended Account Designee has misplaced or deleted the invitation email, or if the Account Designee has not registered within 30 days, the Account Manager can regenerate the invitation email.

The previously generated link will not work once a new email is generated. Invitation emails can only be regenerated for Account Designees in 'Pending' status.

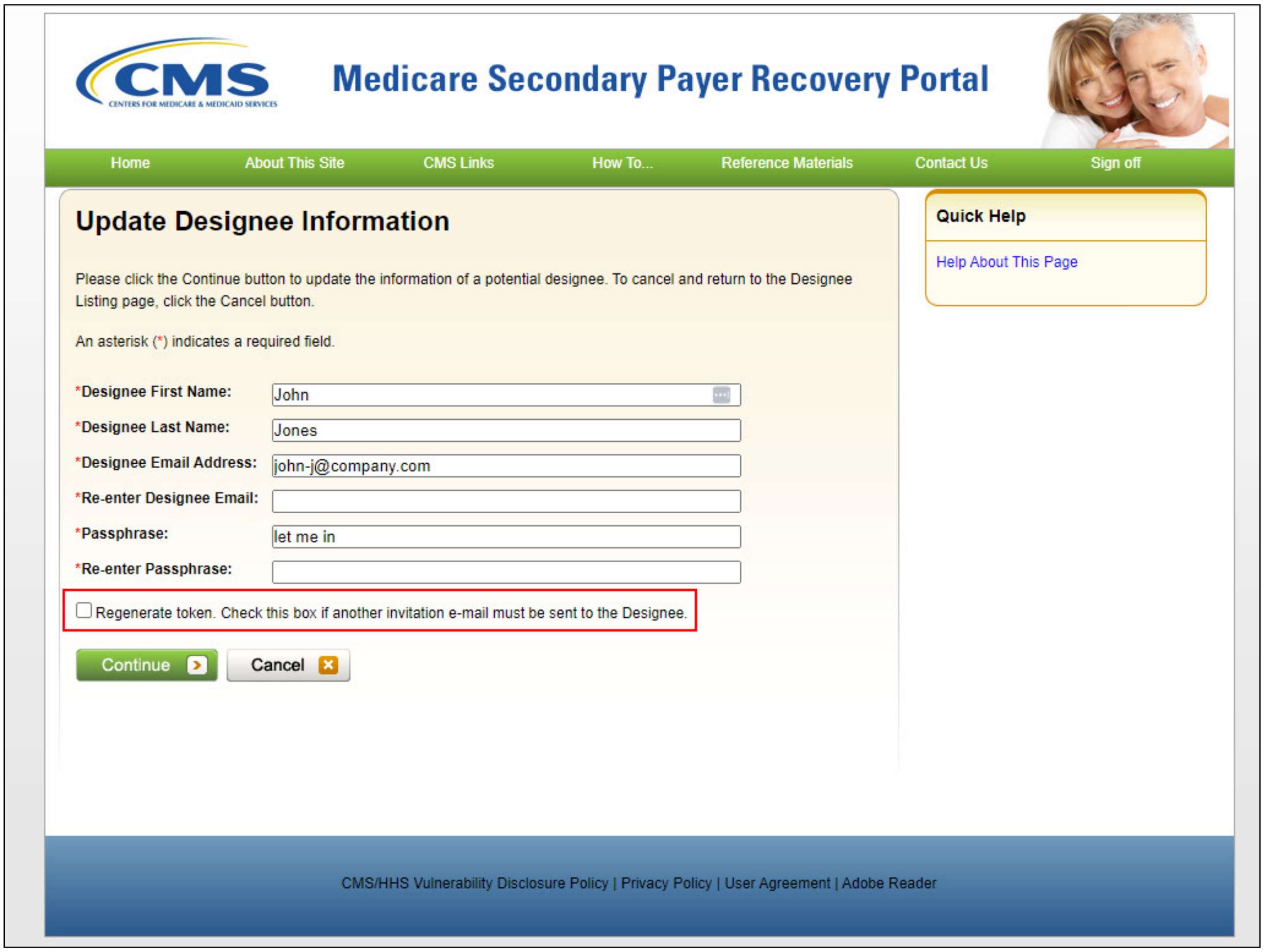
Slide 34 of 48 - Designee Listing Page



Slide notes

On the Designee Listing page, click the last name of the Account Designee that needs the email regenerated.

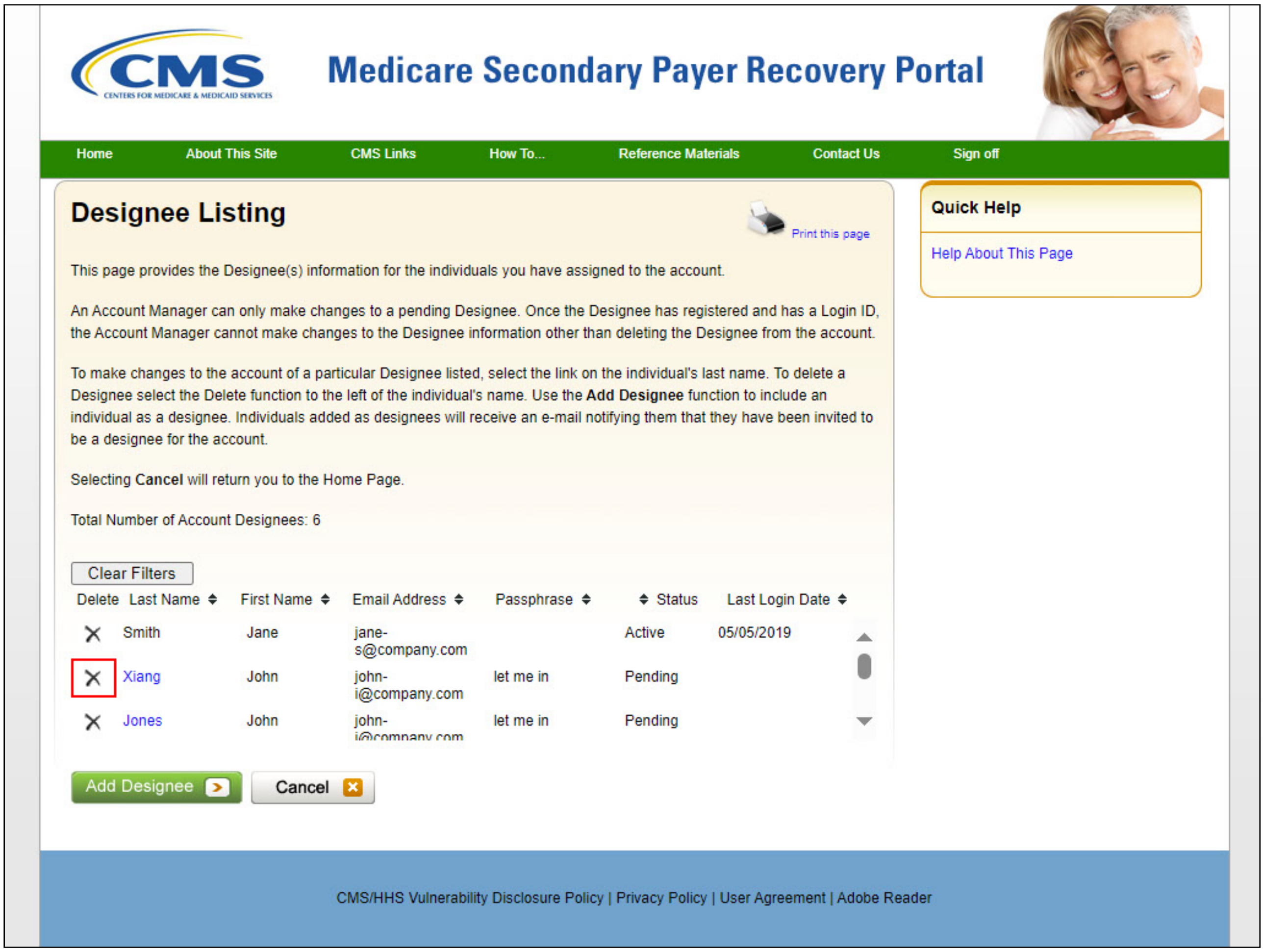
Slide 35 of 48 - Update Designee Information Page



Slide notes

The Update Designee Information page appears. Select the Regenerate invitation email check box beneath the Account Designee's personal information and then click [Continue].

Slide 36 of 48 - Designee Listing Page - Deleting an AD



Slide notes

The Designee Listing page re-appears, with the Account Designee's information unchanged. However, the system re-generates the invitation email and sends it to the email address registered for the Account Designee.

As of July, the last login date will display for each Account Designee on the Designee Listing page. The Account Manager can use this date to determine which Account Designees may no longer be using the account.

To remove an Account Designee from the MSPRP account, click the [X] button next to the individual's name.

The Designee Listing page displays. The Account Designee that was deleted will no longer appear on the listing and will no longer be able to access this MSPRP account.

Note: The Account Designee will not be deleted from any other account they are associated with.

Slide 37 of 48 - Delete Designee Confirmation Page

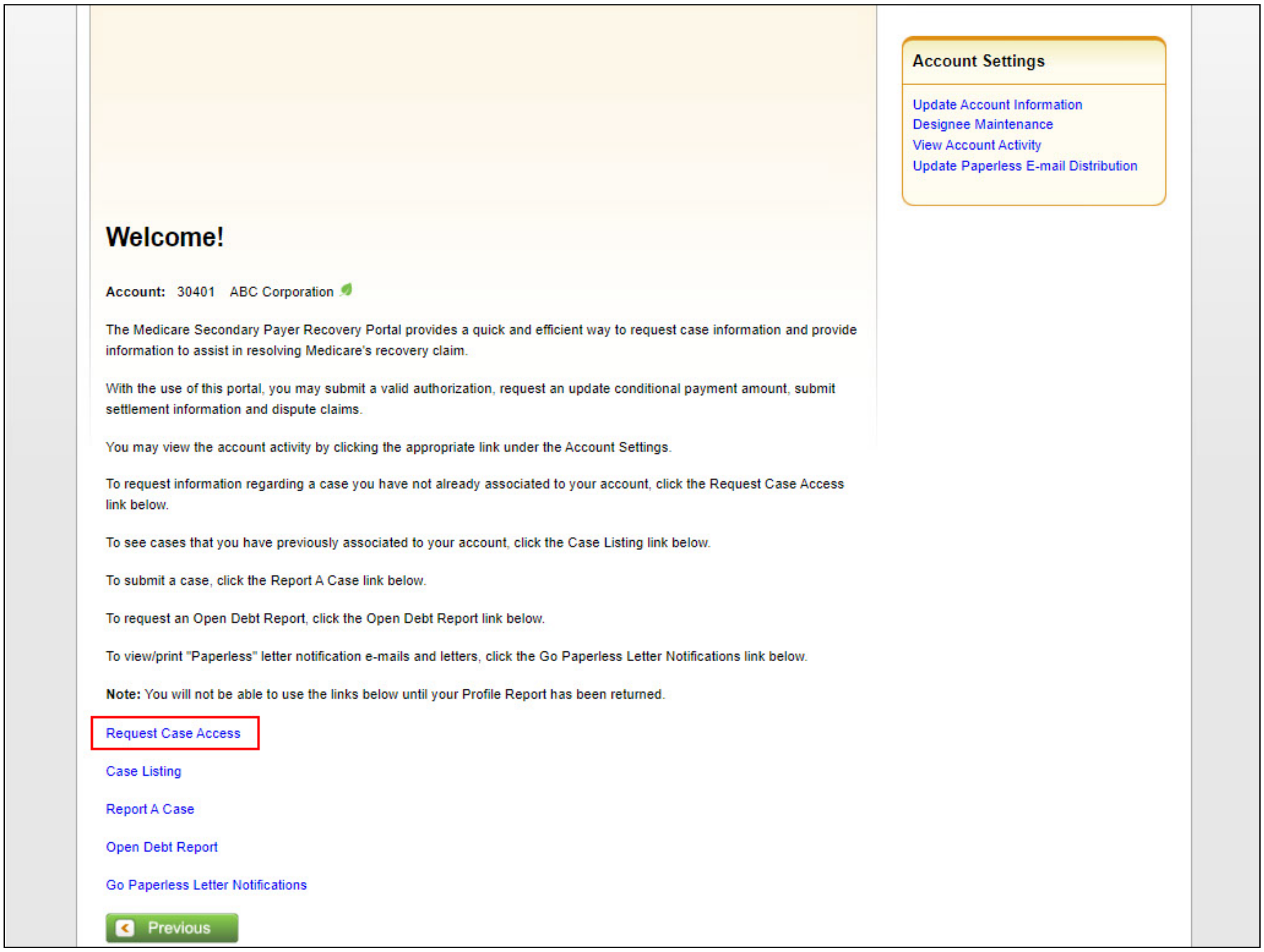
Slide notes

The Designee Confirmation page will appear.

If you do not want to delete this Account Designee from the MSPRP account, click [Cancel] to return to the Designee Listing page. The Account Designee will still be listed with their status unchanged.

If you do want to delete this Account Designee from the MSPRP account, click [Continue].

Slide 38 of 48 - Welcome! Page

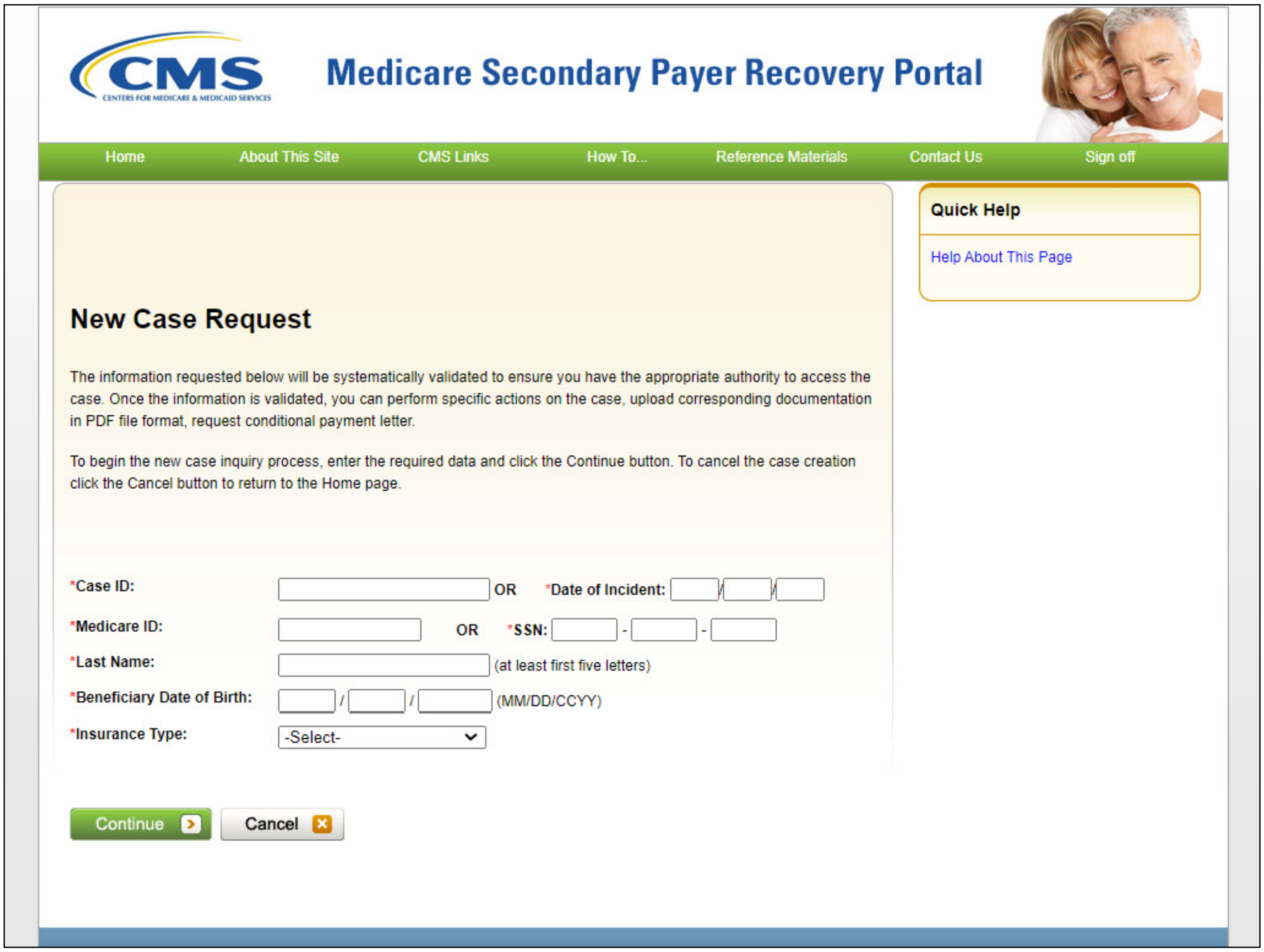


Slide notes

In order to access or manage a case, you will need to link (add) the case to your account using the Request Case Access link. You must always perform this step to link a case to your MSPRP account for the first time.

To link (add) a case to the Account, click [Request Case Access].

Slide 39 of 48 - New Case Request Page



Slide notes

The New Case Request page will appear. Enter the following information for the case you want to access:

Case ID or Date of Incident (DOI),

Beneficiary Medicare ID or Social Security Number (SSN),

Beneficiary Last Name,

Beneficiary Date of Birth, and

the Insurance Type.

If the MSPRP cannot locate the case based on the submitted information, it will display the following message: “No Matching Case Records Found based on the information provided.”

Verify that the data was entered correctly. If any of the fields were incorrectly entered, correct the error and click [Continue].

Note: The following cases will not be available on the MSPRP:

cases referred to CMS,

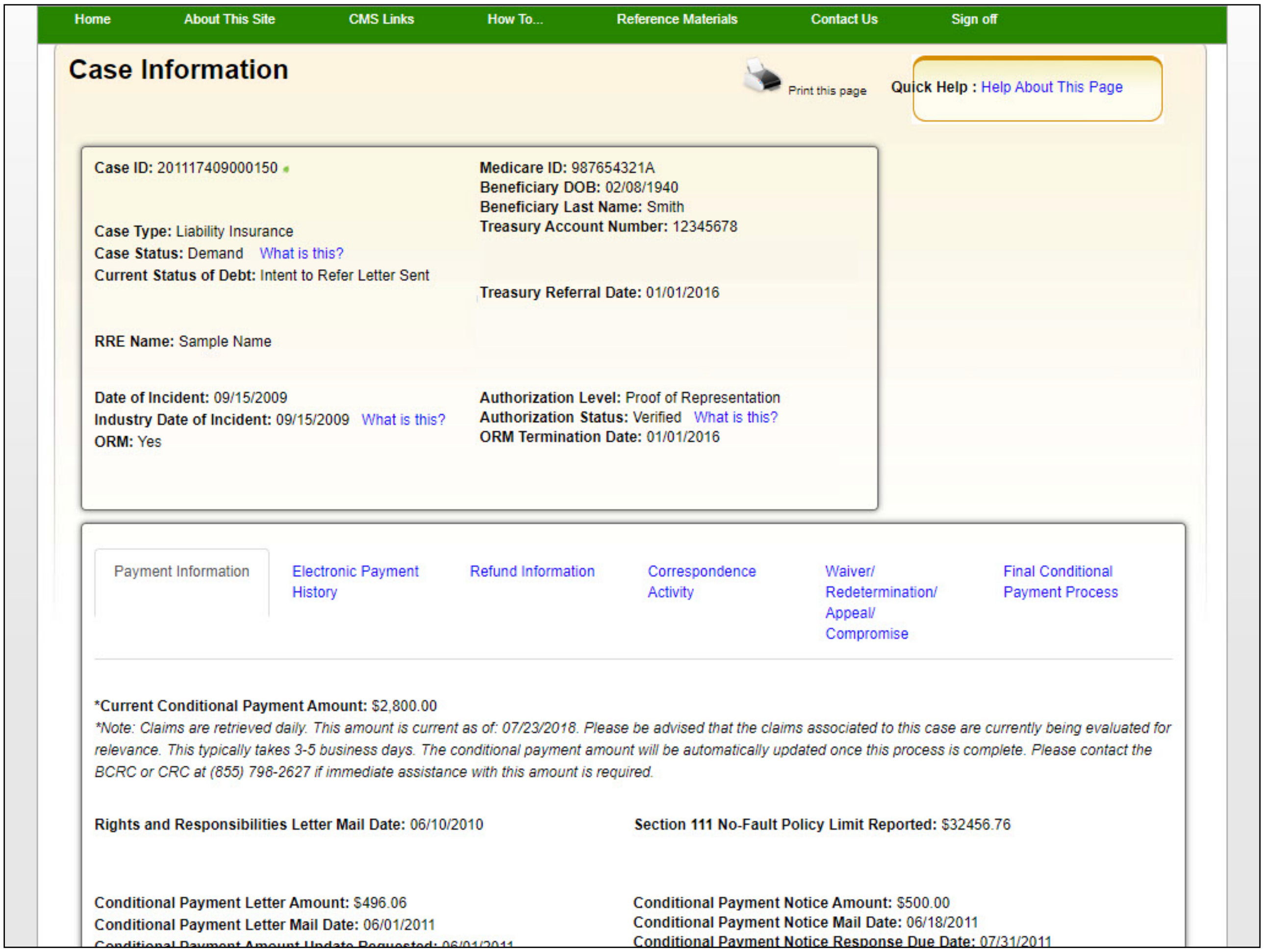
cases referred to Department of Justice, and

cases involving Workers’ Compensation Medicare Set-Aside Amount (WCMSA).

WCMSA cases are only accessible on the Workers’ Compensation Medicare Set-Aside Portal (WCMSAP).

For information on the WCMSAP, see the following link: WCMSAP Website.

Slide 40 of 48 - Case Information Page

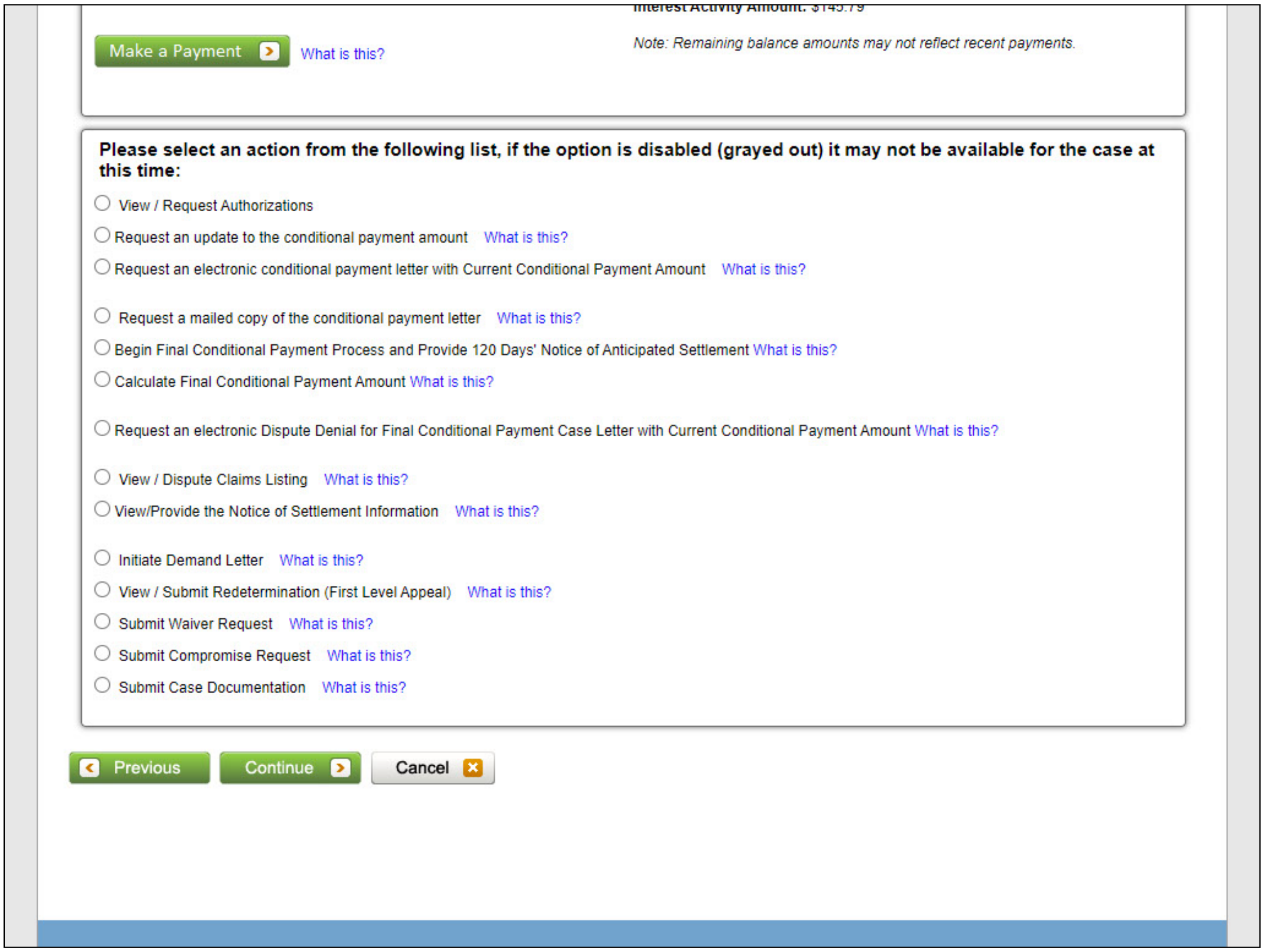


Slide notes

If the MSPRP locates the case based on the information submitted, the Case Information page will appear, and the case will be added to the Case Listing page for the account.

The top portion of the Case Information page allows you to view information related to the case.

Slide 41 of 48 - Case Information Page - Case Actions



Slide notes

The bottom portion of the Case Information page identifies various actions that can be taken on a case which may include:

View/Request Authorizations (Beneficiary Proof of Representation, Beneficiary Consent to Release, or Recovery Agent Authorization)

Request an update to the conditional payment amount

Request an electronic conditional payment letter with Current Conditional Payment Amount

Request a mailed copy of the conditional payment letter

Begin Final Conditional Payment Process and Provide 120 Days' Notice of Anticipated Settlement

Calculate Final Conditional Payment Amount

Request an electronic Dispute Denial for Final Conditional Payment Case Letter with Current Conditional Payment Amount

View/Dispute Claims Listing

View/Provide the Notice of Settlement Information

Initiate Demand Letter

View/Submit Redetermination

Submit Waiver Request

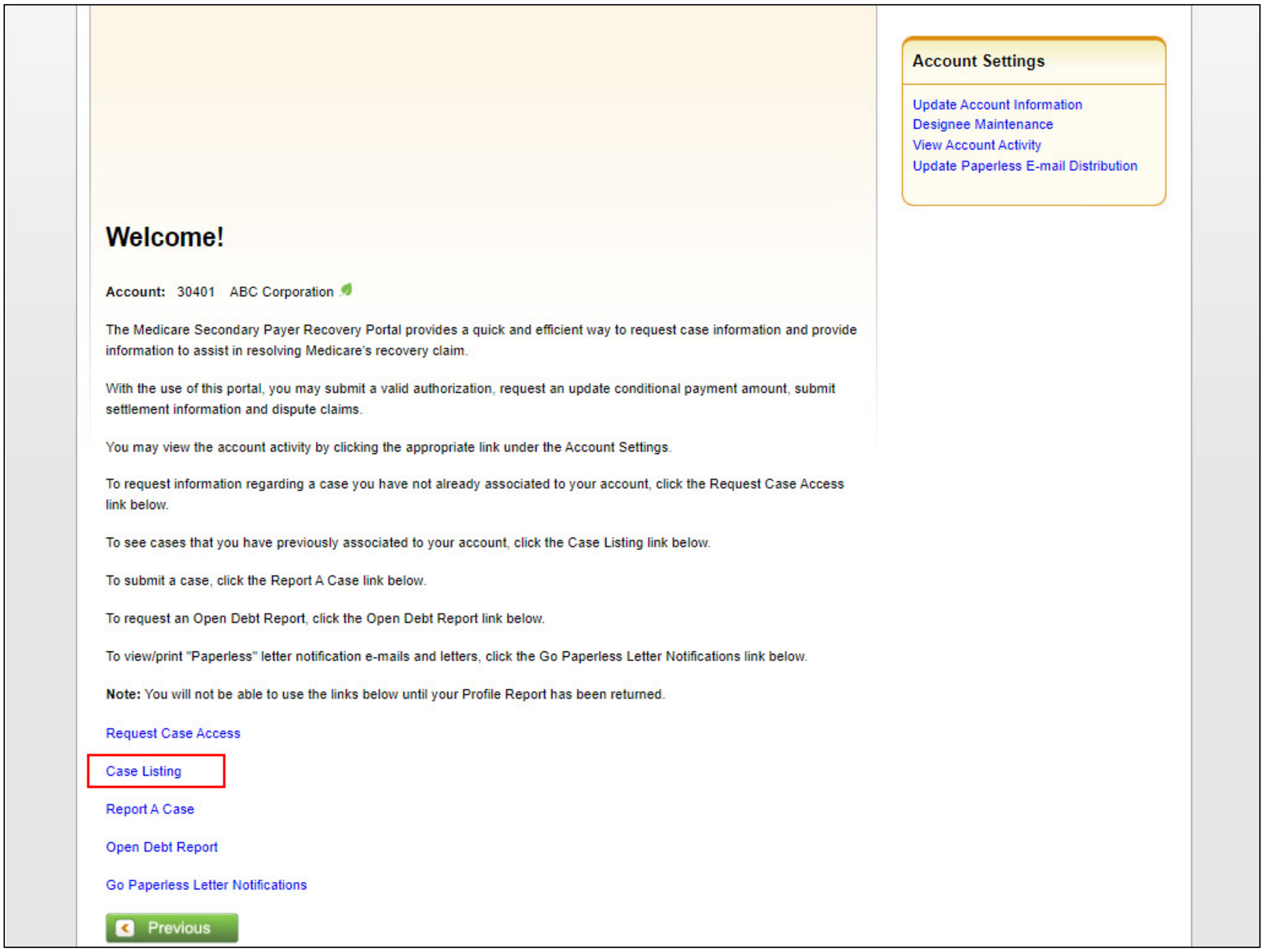
Submit Compromise Request

Submit Case Documentation

Note: Only actions that are applicable to the case and available based on the account's authorization level will display. For example, waiver and compromise requests can only be submitted for beneficiary debtor cases.

This page also contains a previous button, the user does not have to return to the Account List page or restart your search a new search.

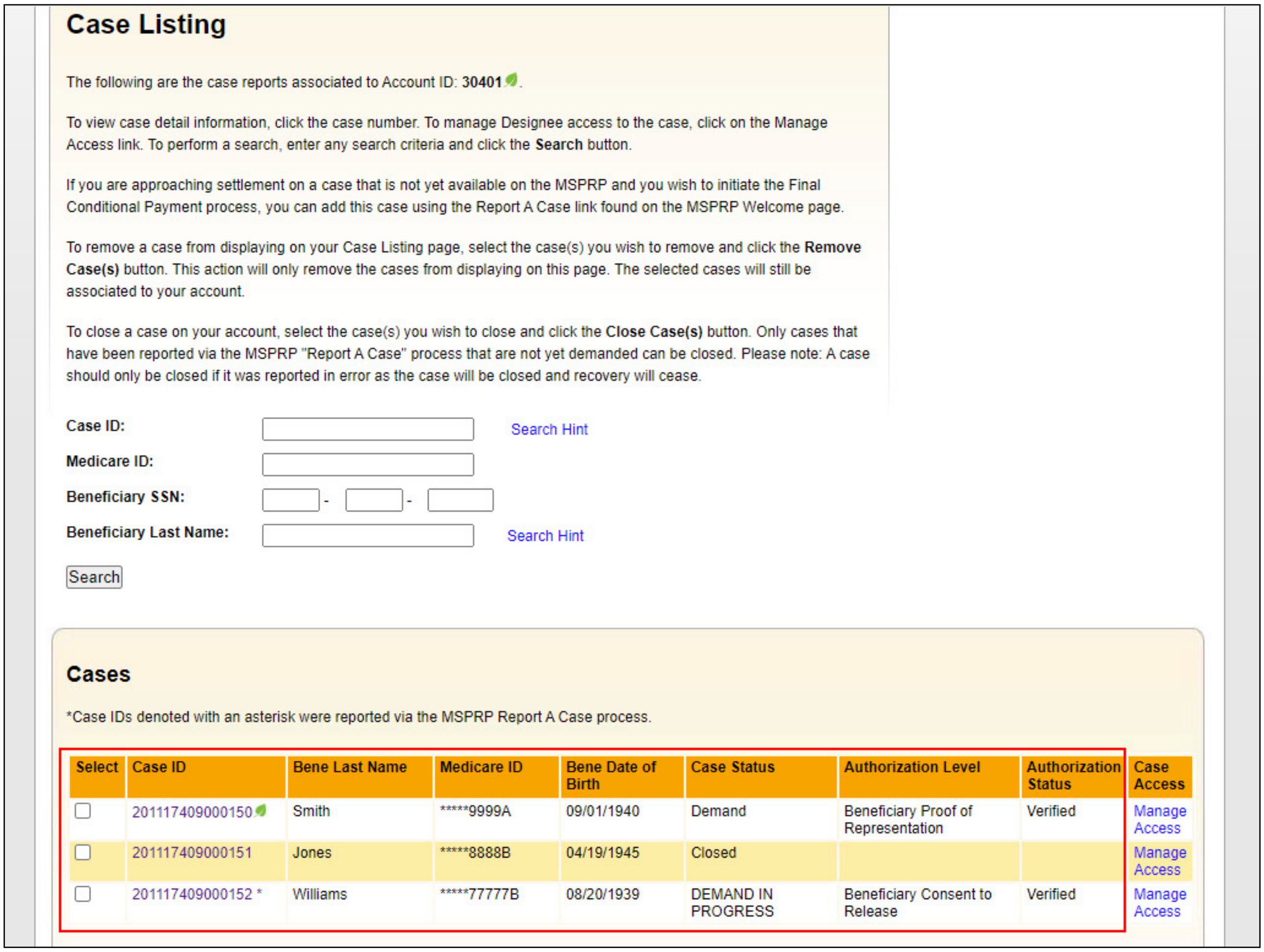
Slide 42 of 48 - Welcome! Page



Slide notes

To view and manage cases that have been associated/linked to your MSPRP account, click [Case Listing].

Slide 43 of 48 - Case Listing Page



Case Listing

The following are the case reports associated to Account ID: **30401**.

To view case detail information, click the case number. To manage Designee access to the case, click on the Manage Access link. To perform a search, enter any search criteria and click the **Search** button.

If you are approaching settlement on a case that is not yet available on the MSPRP and you wish to initiate the Final Conditional Payment process, you can add this case using the Report A Case link found on the MSPRP Welcome page.

To remove a case from displaying on your Case Listing page, select the case(s) you wish to remove and click the **Remove Case(s)** button. This action will only remove the cases from displaying on this page. The selected cases will still be associated to your account.

To close a case on your account, select the case(s) you wish to close and click the **Close Case(s)** button. Only cases that have been reported via the MSPRP "Report A Case" process that are not yet demanded can be closed. Please note: A case should only be closed if it was reported in error as the case will be closed and recovery will cease.

Case ID: Search Hint

Medicare ID:

Beneficiary SSN: - -

Beneficiary Last Name: Search Hint

Search

Cases

*Case IDs denoted with an asterisk were reported via the MSPRP Report A Case process.

Select	Case ID	Bene Last Name	Medicare ID	Bene Date of Birth	Case Status	Authorization Level	Authorization Status	Case Access
	201117409000150	Smith	*****9999A	09/01/1940	Demand	Beneficiary Proof of Representation	Verified	Manage Access
	201117409000151	Jones	*****8888B	04/19/1945	Closed			Manage Access
	201117409000152 *	Williams	*****77777B	08/20/1939	DEMAND IN PROGRESS	Beneficiary Consent to Release	Verified	Manage Access

Slide notes

The cases that are associated to your MSPRP account appear at the bottom of this page. The Case ID, beneficiary's last name, beneficiary's Medicare ID/SSN, and beneficiary's date of birth are noted for each case.

To view case information on a specific case, you will click the [Case ID] link that appears in the list of cases. This will take you to the Case Information page for that case. To manage access to the case, select [Case Access].

Note: The green leaf image denotes the ability to receive paperless correspondence. However, the paperless option is only available to the Account Manager.

Slide 44 of 48 - Manage Case Access Page

Slide notes

The Manage Case Access page will appear. This page allows you to grant or revoke an Account Designee's access for the Case ID and Beneficiary Last Name displayed at the top of the page.

This page displays all Account Designees currently associated to your account.

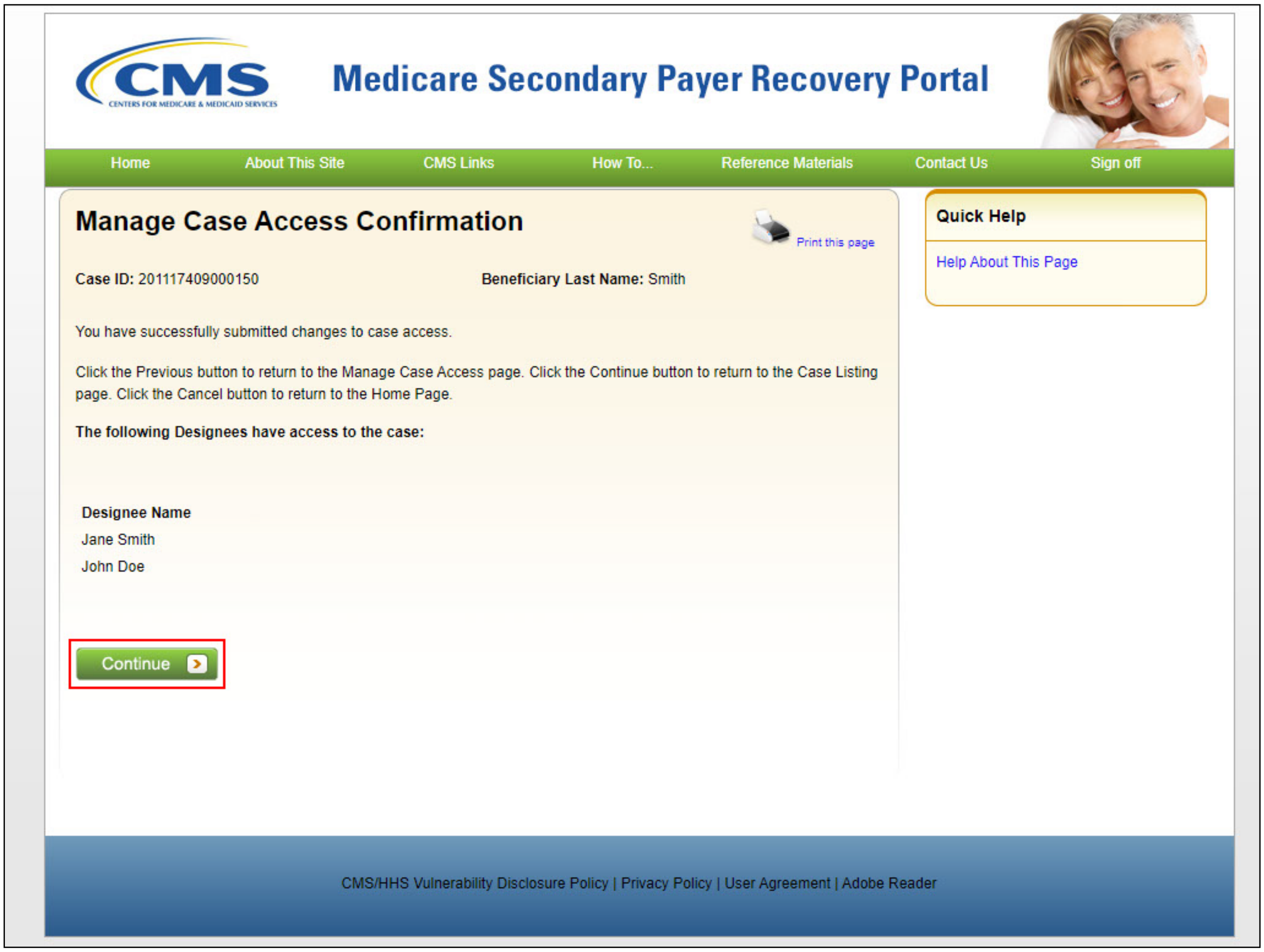
Click the [Grant/Revoke Access] checkbox next to the Account Designee's name to grant or revoke access to the Account Designee. A checked box means the Account Designee has been granted access to the case.

A blank (unchecked) box means that they do not have access to the case/their access has been revoked.

To include/exclude all Account Designees in having access to the case, click the [Select All] checkbox. This is a toggle on/off switch to select/de-select Account Designees. Click to select all Account Designees, click again to de-select all Account Designees.

When you have completed your selections, click [Continue].

Slide 45 of 48 - Manage Case Access Confirmation



Slide notes

The Manage Case Access Confirmation page will appear. The list of Account Designees that have access to this case is displayed. Click [Continue] to return to the Case Listing page.

Slide 46 of 48 - Course Summary

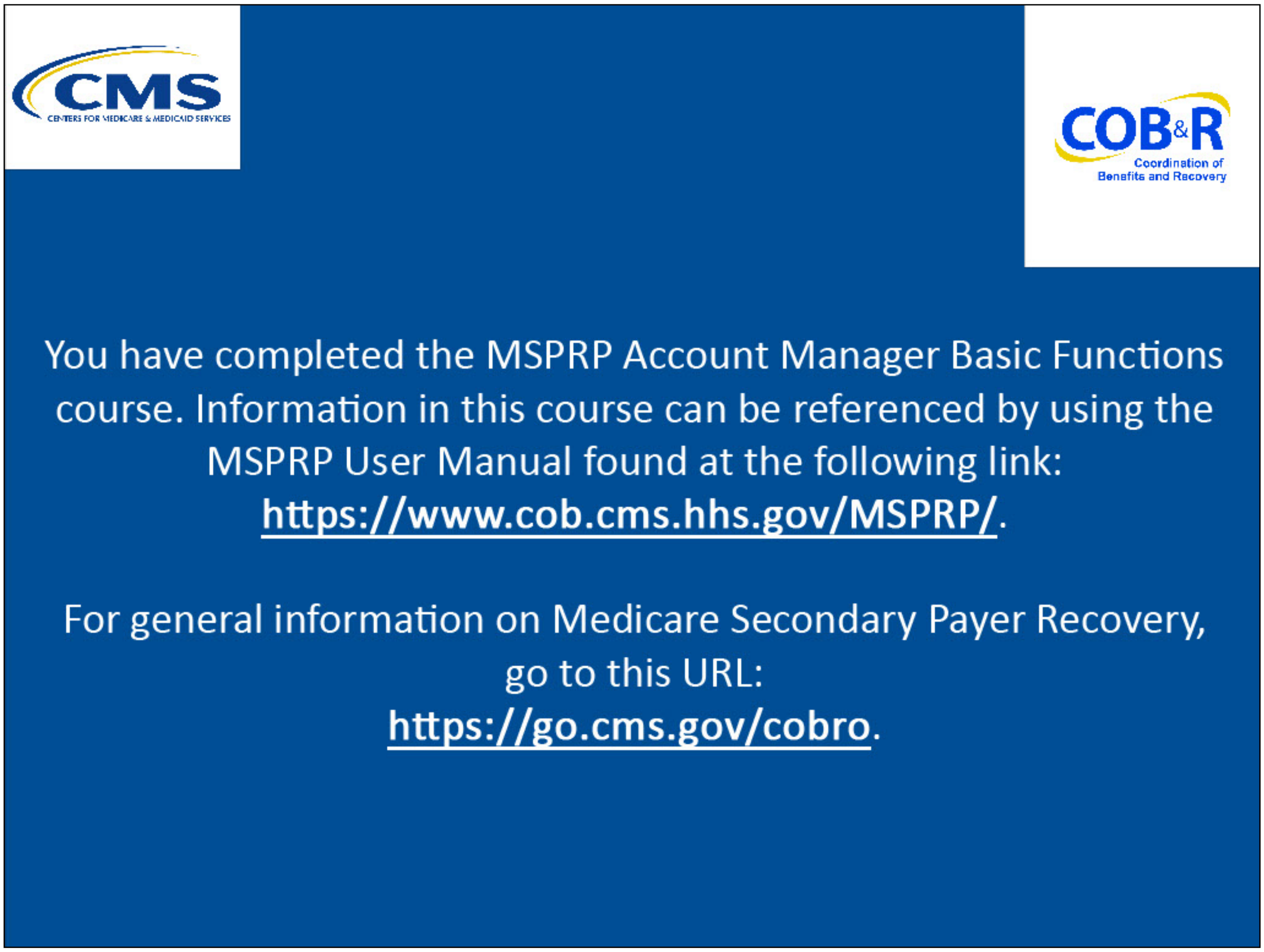
Course Summary

- Role of Account Manager
  - Paperless Options for Account Managers
- Basic Functions
  - Manage account
  - Account Designee maintenance

Slide notes

This course explained the role of the Account Manager and how they manage the account and perform Account Designee maintenance.

Slide 47 of 48 - Conclusion



Slide notes

You have completed the MSPRP Account Manager Basic Functions course. Information in this course can be referenced by using the MSPRP User Manual found at the following link: https://www.cob.cms.hhs.gov/MSPRP/.

For general information on Medicare Secondary Payer Recovery, go to this URL: http:/go.cms.gov/cobro.

Slide 48 of 48 - MSPRP Training Survey

Slide notes

If you have any questions or feedback on this material, please go to the following URL: http://www.surveymonkey.com/s/MSPRPTraining.