

Representative Account Setup Introduction

Slide 1 of 22 - Representative Account Setup Introduction

CMS
CENTERS FOR MEDICARE & MEDICAID SERVICES

COB&R
Coordination of
Benefits and Recovery

Medicare Secondary Payer Recovery Portal (MSPRP) Representative Account Setup

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<https://go.cms.gov/msprp>.

Slide notes

Welcome to the Medicare Secondary Payer Recovery Portal (MSPRP) Representative Account Setup course.

Note: This course is intended for those entities who will register for a Representative account.

A Representative account type indicates that the entity does not have an Employer Identification Number (EIN) or Tax Identification Number (TIN), but may have involvement with multiple cases.

Representative accounts may have up to five Account Designees.

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 found in the MSPRP User Manual found at the following link:
<https://www.cob.cms.hhs.gov/MSPRP/>.

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: [CMS MSPRP Website](https://www.cob.cms.hhs.gov/MSPRP/).

Slide 3 of 22 - Course Overview

Course Overview

- Account Setup Process
- Role of the Account Manager
 - How to complete the Account Setup and register
- Next Steps



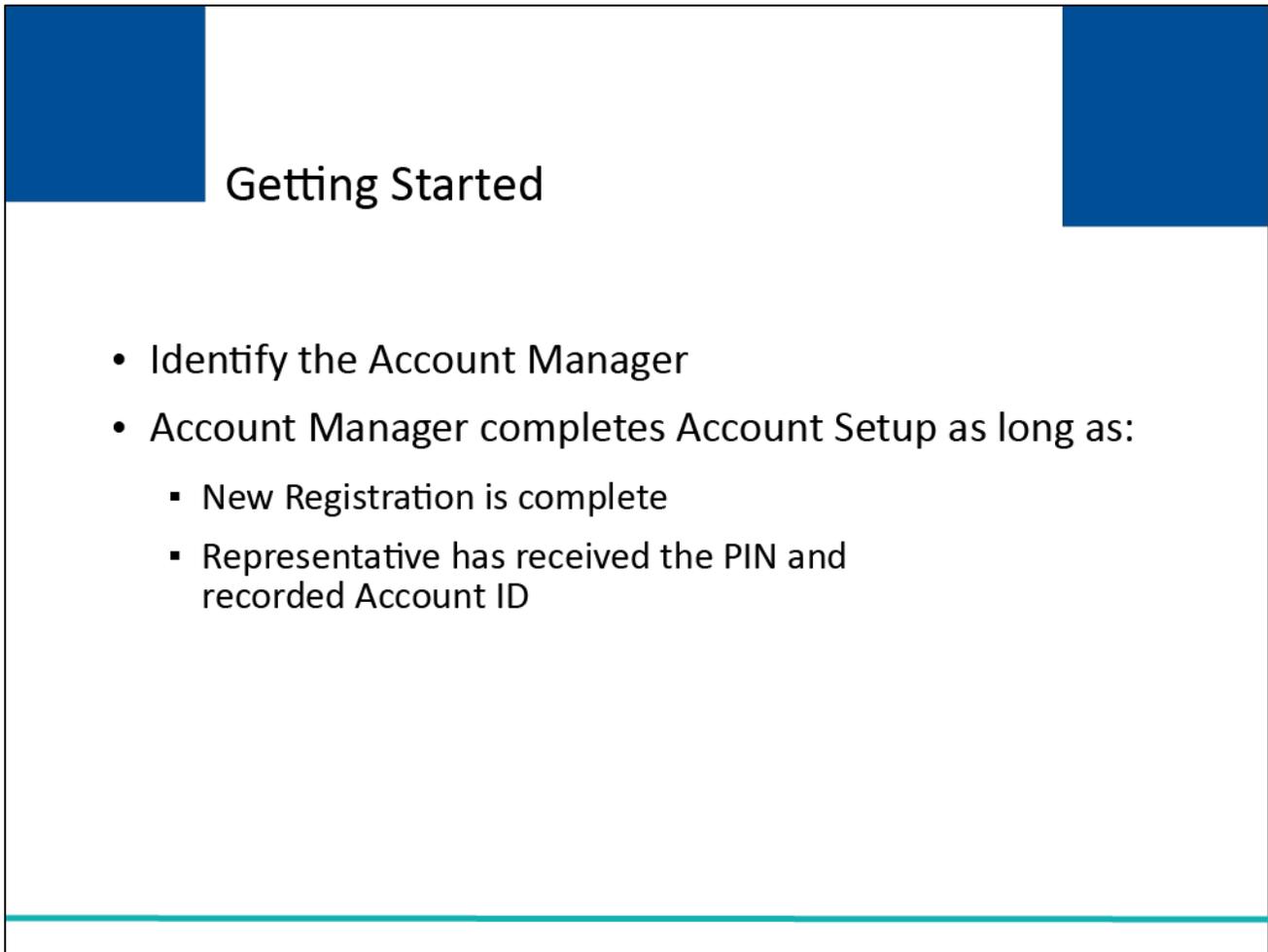
Slide notes

This course will explain the Account Setup process for a Representative account.

It will also describe the role of the Account Manager and explain how the Account Manager completes the Account Setup and register themselves as the Account Manager.

It will then conclude with the steps to follow once the Account Setup has been completed.

Slide 4 of 22 - Getting Started



Getting Started

- Identify the Account Manager
- Account Manager completes Account Setup as long as:
 - New Registration is complete
 - Representative has received the PIN and recorded Account ID

Slide notes

To begin, the Representative must designate the Account Manager. For the Representative account, the Representative may also be the Account Manager.

The Account Manager is responsible for completing the Account Setup.

Account Setup can only be initiated after the Representative entity has completed the New Registration step and recorded the Account ID; and their Representative has received an email from the MSPRP containing the Personal Identification Number (PIN). The Account Manager will need this information to complete the Account Setup.

Under a Representative account, the Representative has all of the same duties and responsibilities, except, the Representative may also be the Account Manager and thus be a user of the system.

Slide 5 of 22 - Getting Started

Getting Started

- Account Manager
 - Established during Account Setup
 - Is a registered MSPRP User
 - Controls administration of the account
 - Manages the overall process
 - Can be associated to other MSPRP accounts as an Account Manager or an Account Designee
 - May choose to manage the entire account or invite other individuals to assist in the process

Slide notes

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

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.

The Account Manager can be associated to other MSPRP accounts 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 to assist in this process. For Representative accounts, Account Managers have the option to assign the Account Manager role to another user.

For more information on the Account Manager's role and access to MSPRP functionality and cases please see the [Account Manager Functions](#) CBT.

Slide 6 of 22 - Account Setup

Account Setup

- Account Manager must go to the MSPRP URL:
<https://www.cob.cms.hhs.gov/MSPRP/>

Slide notes

Once the Account Manager has been identified and they are ready to begin the Account Setup, they must go to the MSPRP URL at the following link: [CMS MSPRP Website](https://www.cob.cms.hhs.gov/MSPRP/).

Slide 7 of 22 - Login Warning

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, as well as 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. The Privacy Act (5 U.S.C. 552a(b)), as amended, prohibits the disclosure of information maintained by the Centers for Medicare & Medicaid Services (CMS) in a system of records to third parties, unless the beneficiary provides a written request or explicit written consent/authorization for a party to receive such information. Where the beneficiary provides written consent/proof of representation, CMS will permit authorized parties to access requisite information.

Attestation of Information

Slide notes

Each time a user visits the MSPRP website, the Login Warning page will appear. This page provides information about MSPRP security measures including access, penalty, and privacy laws.

This page can be printed from the MSPRP by clicking the [Print this page] link on the website.

Scroll to the bottom of this page to review the entire statement. Users must agree to the terms of this warning each time they access the MSPRP. Click the [I Accept] link at the bottom of the page to continue.

Slide 8 of 22 - Welcome to the MSPRP

Welcome to the MSPRP

The Medicare Secondary Payer Recovery Portal provides a quick and efficient way to request case information and provide information to assist in resolving Medicare's recovery claim. With the use of this portal, you may submit a valid authorization, request an update to the conditional payment amount, submit settlement information and dispute claims.

For information about the availability of auxiliary aids and services, please visit:
<http://www.medicare.gov/about-us/nondiscrimination/nondiscrimination-notice.html>

MSPRP Message

Check this location for important information regarding system outages, scheduled maintenance and special announcements.

Getting Started

If you are a Medicare Beneficiary and would like to use the MSPRP to request case information, please login to your Medicare account by visiting the Medicare.gov website at <https://medicare.gov/>.

Registration is required to use this application. For corporate accounts, your **Account Representative** must complete the *New Registration* and your **Account Manager** must complete the *Account Setup*. These individuals cannot be the same person.

The **Account Representative (AR)** is the person in your organization who has the legal authority to bind your organization to a contract and to the terms of MSPRP requirements. This is usually a senior executive or partner of your company or firm. The AR has ultimate accountability for the information submitted on the MSPRP.

The **Account Manager (AM)** is the person who will actively manage your account recovery case workload. This includes inviting **Account Designees (ADs)** and managing their access to the account.

For more information on the registration process and MSPRP user roles, please refer to the *How to Get Started* help document, located under the How To menu on the Navigation bar. To begin the registration process, your MSPRP **Account Representative** will click the *New Registration* button.

STEP 1
New Registration

STEP 2
Account Setup
(Account ID and PIN required)

Sign in to your account

User Name:

[Forgot User Name](#)

Password:

[Forgot Password](#)

Slide notes

Once the [I Accept] link is clicked, the MSPRP Login page will display. Click the [Account Setup] button.

Slide 9 of 22 - Account Setup Introduction

The screenshot shows the Medicare Secondary Payer Recovery Portal. At the top left is the CMS logo (Centers for Medicare & Medicaid Services). To its right is the page title "Medicare Secondary Payer Recovery Portal" and a photo of a smiling couple. Below the header is a green navigation bar with links: Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Sign off. The main content area is titled "Account Setup Introduction" and contains the following text:

You have selected a link that guides you through the process of establishing a new Account Manager ID for the Medicare Secondary Payer Recovery Portal (MSPRP). Please have your Account Identification Number and Personal Identification Number (PIN) available. The Account ID was provided at initial registration and the PIN was emailed to the contact for the account after vetting was complete. This would be the Account Representative for a corporate account type, and the Representative for a representative account type.

During this process you will:

- Finalize the establishment of the account, and
- Create your personal Login ID for the MSPRP.

Before proceeding it is important to understand the roles of the various MSPRP users, and their respective responsibilities to ensure the MSPRP accounts are managed correctly. The role of the Account Manager is described below.

Account Manager – The Account Manager is the MSPRP user who is required to initiate the request for an account. They are the person who "administers" the account on the Web site on behalf of the registrant. The Account Manager is the person who is responsible for: establishing the account on the Web Portal; managing the case load and assigning some or all of the cases to other responsible parties to complete on the MSPRP; tracking the status of the tasks assigned to others; and ensuring case entry and submission are completed on time. The Account Manager is responsible for inviting other employees to register on the Web Portal and managing their access. The Account Manager may complete and submit cases on his own or invite Designees to assist as needed.

If your user role in the MSPRP is an Account Manager, as described above, and you have not yet registered, press the **Continue** button and proceed with registering as a new Account Manager.

At the bottom of the main content area, there are two buttons: "Continue" (highlighted with a red box) and "Cancel".

On the right side of the page, there is a "Quick Help" box containing a link: "Help About This Page".

Slide notes

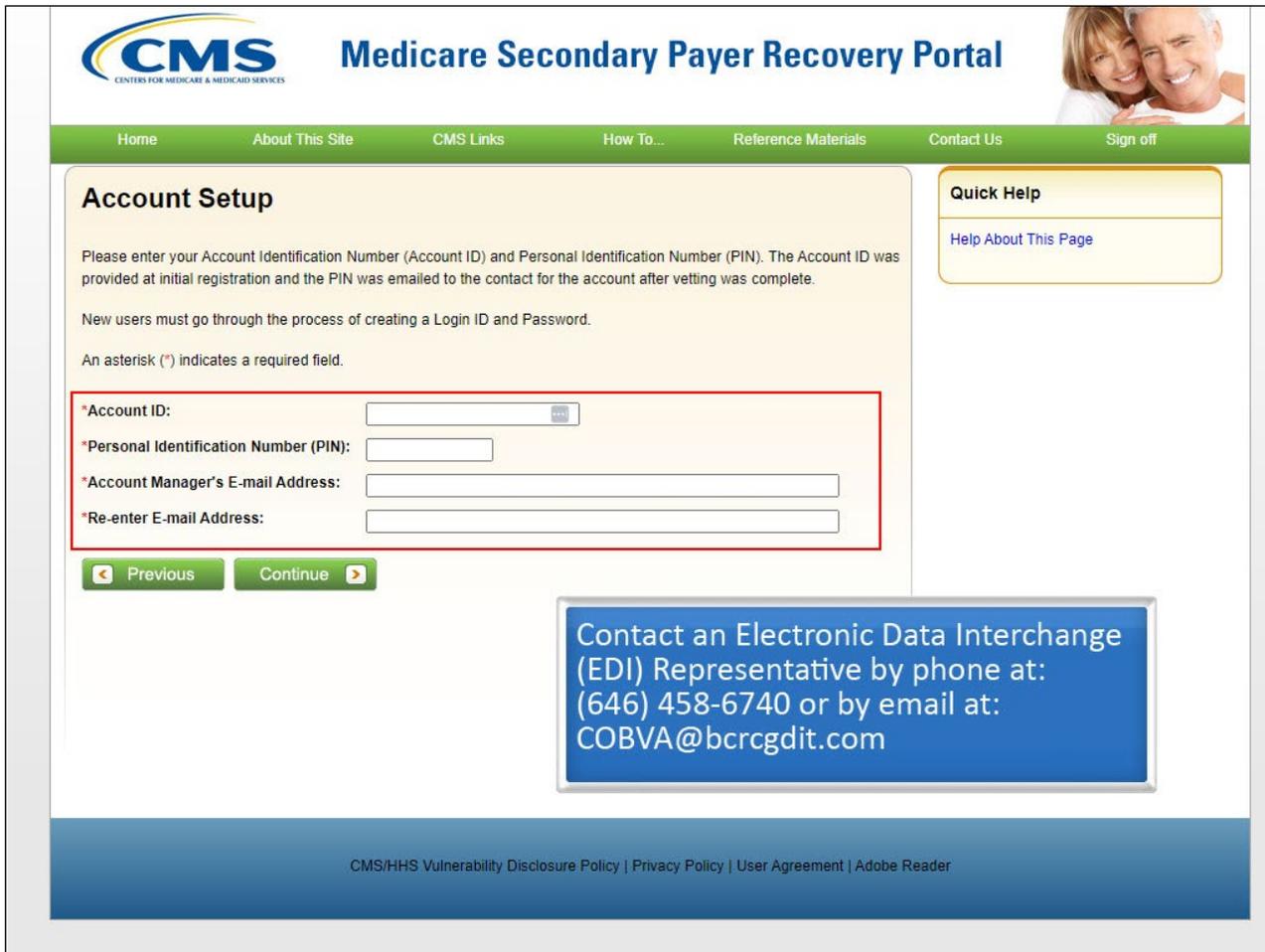
The Account Setup Introduction page will appear. This page describes the Account Setup process and informs the Account Manager of their responsibilities as an MSPRP user.

An Account Manager cannot be an Account Representative for another MSPRP account.

If you are not associated to another account as an Account Representative, click [Continue] to proceed.

Note: The Account Manager can be the Representative for this account.

Slide 10 of 22 - Account Setup



Slide notes

The Account Setup page will appear.

This page requires the Account Manager to enter the Account ID, which should be recorded by the Account Representation during registration, and PIN that was emailed to the Representative after completion of the New Registration process and subsequent validation of the registration by CMS.

The Account Manager will also enter their personal email address. The email address may match the email address of the Representative for the same account.

Note: It is critical that you enter the correct email address for your Account Manager, as this information will be used to send important information regarding your account.

When the required information has been entered, click [Continue] to proceed.

The system will verify that the Account ID and PIN are valid. If either is invalid, an error message will display. If the Account ID and PIN are entered incorrectly three times, the account will be locked, and setup will be prevented.

You must contact your Electronic Data Interchange (EDI) Representative to reset the PIN to unlock the account in this case. The EDI Representative may be reached by phone at: (646) 458-6740 or by email at: COBVA@bcrcgdit.com.

The system will also verify that the submitted email address does not match the email address of an Account Representative on another MSPRP account.

If the system detects that the user is associated with another MSPRP account, as an Account Representative, the user will be prevented from registering as the Account Manager for this account.

Slide 11 of 22 - Account Setup - Representative Information

The screenshot shows the Medicare Secondary Payer Recovery Portal. At the top left is the CMS logo (Centers for Medicare & Medicaid Services). To its right is the title "Medicare Secondary Payer Recovery Portal" and a photo of a smiling couple. Below this is a green navigation bar with links: Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Sign off. The main content area is titled "Account Setup - Representative Information". It contains a paragraph: "Please verify the following individual is the Account Representative for the account which you are going to complete the Account Setup process. If the information is correct please click the Continue button to proceed." Below this is a section titled "Representative Information" with the following pre-filled text: "First Name: John MI: A Last Name: Doe", "Address Line 1: 200 Test Avenue", "Address Line 2: Suite 2b", "City: Towson", "State: Maryland", "Zip Code: 21204-2176", and "Phone: 123-456-7890 Ext: 12345". At the bottom of this section are two buttons: "Previous" and "Continue". The "Continue" button is highlighted with a red rectangular box. To the right of the main content is a "Quick Help" box with a link "Help About This Page". At the bottom of the page is a blue footer bar with the text "CMS/HHS Vulnerability Disclosure Policy | Privacy Policy | User Agreement | Adobe Reader".

Slide notes

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

The Representative's name, mailing address, and phone number will appear.

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 Representative, contact an EDI Representative.

Slide 12 of 22 - Account Manager Personal Information

Account Manager Personal Information

An asterisk (*) indicates a required field.

*First Name: MI: *Last Name:

*E-mail Address:

*Re-enter E-mail Address:

*Phone: - - - ext.:

Case Processing Mailing Address

*Address Line 1:

Address Line 2:

*City:

*State:

*Zip Code: -

Quick Help
[Help About This Page](#)

You must read the User Agreement 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 agreement below](#)

User Agreement

Slide notes

The Account Manager Personal Information page will appear. The information entered on this page is required for subsequent communications. All fields denoted by an asterisk (*) are required.

If the Account Manager for the account is the same person that was entered on the Representative Information page during the New Registration process (i.e., the Representative for the account), click [Same as Submitter].

The fields will be automatically populated with the Representative’s information.

If the Account Manager for the account is not the Representative, enter the Account Manager’s name and phone number. The Email Address field will be populated with the email address that was entered on the Account Setup page.

It will be protected from entry because the email address was validated on the first page of the setup process.

Enter the Recovery Case Mailing Address at which you have previously received correspondence from Medicare related to the recovery case.

If you have not received any correspondence from Medicare regarding this case, enter the address at which you want correspondence directed.

This address will be used to link the account to associated recovery cases.

Once this link is established, the level of authorization that the account can/should have on the case is determined and appropriate MSPRP functionality for that account will be enabled on the MSPRP.

Note: The address entered on this page will update and replace the business mailing address that was entered during the registration process on the Representative Information page (i.e., if the address entered on this page is different than what was originally submitted).

Slide 13 of 22 - User Agreement

*Phone: [] - [] - [] - ext.: []

Case Processing Mailing Address

*Address Line 1: []

Address Line 2: []

*City: []

*State: Please Select [v]

*Zip Code: [] - []

You must read the User Agreement 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 agreement below](#)

User Agreement

1. Purpose of Medicare Secondary Payer Recovery Portal (MSPRP) Secure Web site

The Medicare Secondary Payer Recovery Portal (MSPRP) will allow for the electronic receipt/processing of case requests. With the introduction of a MSPRP web portal, WCMSA submitters will receive prompt and direct feedback regarding a WCMSA case.

Please check the following box:

I accept the User agreement and Privacy Policy above.

Previous Continue

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

Slide notes

When all required fields have been entered, review the User Agreement. You must agree to the terms in the User Agreement in order to proceed with Account Setup. The User Agreement 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 agreement below] link. To accept the agreement, click the "I accept" checkbox and then click [Continue].

Slide 14 of 22 - Account Manager Login Information

Account Manager Login Information

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.

Quick Help
[Help About This Page](#)

Choose your Login ID and password carefully.

- 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 Help About This Page for a complete list).

An asterisk (*) indicates a required field.

*Login ID:

*Password:

*Re-enter Password:

The Security Questions allow 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

Choose Security Questions and Provide Answers:

*Security Question 1:

*Answer 1:

*Security Question 2:

*Answer 2:

Slide notes

If you do not already have a Login ID for the MSPRP, Workers’ Compensation Medicare Set-Aside Portal (WCMSAP), and/or Section 111 Coordination of Benefits Secure Website (COBSW), the Account Manager Login Information page will appear where you will create your Login ID for the MSPRP.

Note: If you are an existing user of the MSPRP, WCMSAP, and/or Section 111 COBSW, you will not create a new Login ID. You will use the same Login ID for each application and therefore will bypass this page.

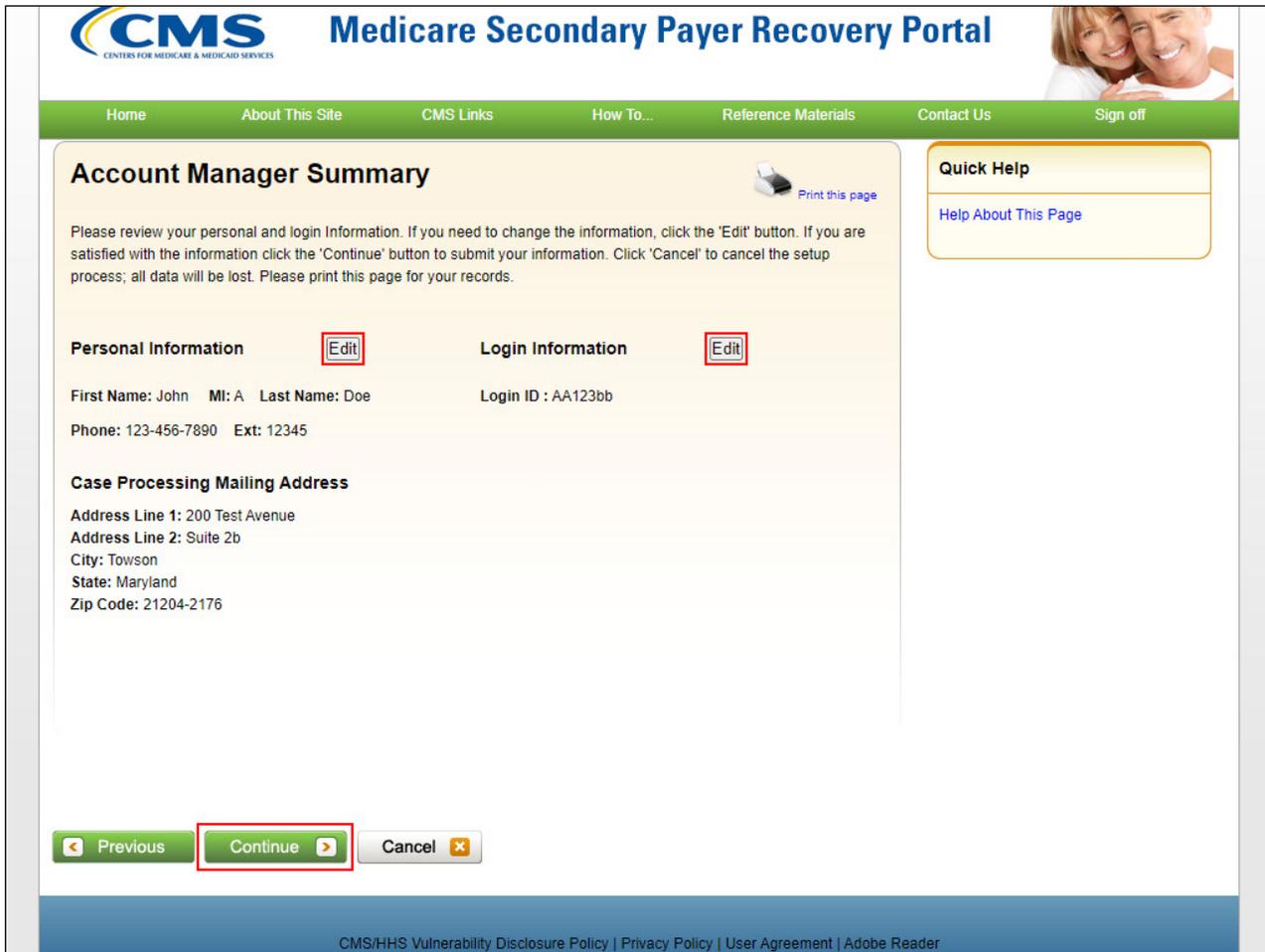
New users must set up a Login ID and Password that conforms to the CMS standard guidelines shown on the slide.

Create and enter a Login ID and enter and re-enter a Password. You will use your Login ID and Password to access the MSPRP site.

Choose security questions and 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.

When you have completed the Account Manager Login Information page, click [Continue].

Slide 15 of 22 - Account Manager Summary



Slide notes

The Account Manager Summary page will appear next. This page displays a summarized view of the information that was entered during Account Setup (i.e., Account Manager’s personal information and Recovery Case Mailing Address).

It also provides you the opportunity to revise the Account Manager’s name, phone number, Login ID and/or Password, and the Recovery Case Mailing Address. Review this summary to ensure it is accurate. If information needs to be corrected, click [Edit] 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 page.

Note: To make corrections to the Recovery Case Mailing Address, click [Edit] for the Personal Information section. When you have verified the information, click [Continue] to proceed with the Account Setup.

Slide 16 of 22 - Thank You

The screenshot shows the Medicare Secondary Payer Recovery Portal's 'Thank You' page. At the top left is the CMS logo (Centers for Medicare & Medicaid Services). To its right is the page title 'Medicare Secondary Payer Recovery Portal' and a photo of a smiling couple. A green navigation bar contains links for Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Sign off. The main content area has a yellow background and is titled 'Thank You'. It includes a 'Print this page' icon and text stating that the user has successfully completed account setup. A 'Next Steps' section provides instructions on receiving and returning a Profile Report. A 'Please note' section specifies the subject line for profile reports. A red-bordered 'Exit' button with a right-pointing arrow is located at the bottom left of the main content area. On the right side, there is a 'Quick Help' box with a 'Help About This Page' link. The footer contains links for CMS/HHS Vulnerability Disclosure Policy, Privacy Policy, User Agreement, and Adobe Reader.

Slide notes

The Thank You page will display which confirms that you have successfully completed the Account Setup for the MSPRP Account ID and established yourself as the Account Manager for that Account.

Slide 17 of 22 - Next Steps

Next Steps

- Limited functionality until signed Profile Report has been returned
 - Can perform account maintenance
 - Can invite other individuals to be Account Designees
 - Cannot access/view any recovery cases
- It is in your best interest to return the Profile Report promptly

Slide notes

Once the Account Manager has completed the Account Setup, an email notification will be sent to both the Representative and the Account Manager.

This notification requests the Account Manager to verify the details of the account. It includes a Data Use Agreement and a Profile Report denoting all the information previously recorded during registration and Account Setup.

It may take up to 10 business days to receive the Profile Report.

Slide 18 of 22 - Next Steps

Next Steps

- Account Manager
 - Must review the Profile Report
 - Contact an EDI Representative to request modifications
 - Return Profile Report via email within 60 business days
 - Put 'MSPRP Profile Report' in the subject line
- If signed Profile Report is not received within 60 days, the account will automatically be deleted
 - Registration process must be started from the beginning

Slide notes

The Account Manager must review the Profile Report for accuracy. If information on the Profile Report is inaccurate or requires modifications, please contact an EDI Representative.

The Account Manager will have 60 business days to review, sign, and return the Profile Report to the Medicare - EDI Department. When returning the signed Profile Report via email, put 'MSPRP 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 19 of 22 - Next Steps

Next Steps

- Limited functionality until signed Profile Report has been returned
 - Can perform account maintenance
 - Can invite other individuals to be Account Designees
 - Cannot access/view any recovery cases
- It is in your best interest to return the Profile Report promptly

Slide notes

You will have limited MSPRP functionality until the signed Profile Report has been received. You will only be able to perform account maintenance and invite other individuals to assist as Account Designees.

However, you will not be able to access/view any recovery cases until the Profile Report has been returned.

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

Slide 20 of 22 - Course Summary

Course Summary

- Account Setup Process
- Role of the Account Manager
 - How to complete the Account Setup and register
- Next Steps



Slide notes

This course explained the Account Setup process for a Representative account.

It also described the role of the Account Manager and explained how the Account Manager completes the Account Setup and registers themselves as the Account Manager.

It concluded with the steps to follow once the Account Setup has been completed.

Slide 21 of 22 - Representative Account Setup



You have completed the MSPRP Representative Account Setup 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:
<https://go.cms.gov/cobro>.

Slide notes

You have completed the MSPRP Representative Account Setup course. Information in this course can be referenced by using the MSPRP User Manual found at the following link: [CMS MSPRP Website](#).

For general information on Medicare Secondary Payer Recovery, go to this URL: [CMS COB&R Overview](#).

Slide 22 of 22 - MSPRP Training Survey



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

Slide notes

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

[Training Survey](#).