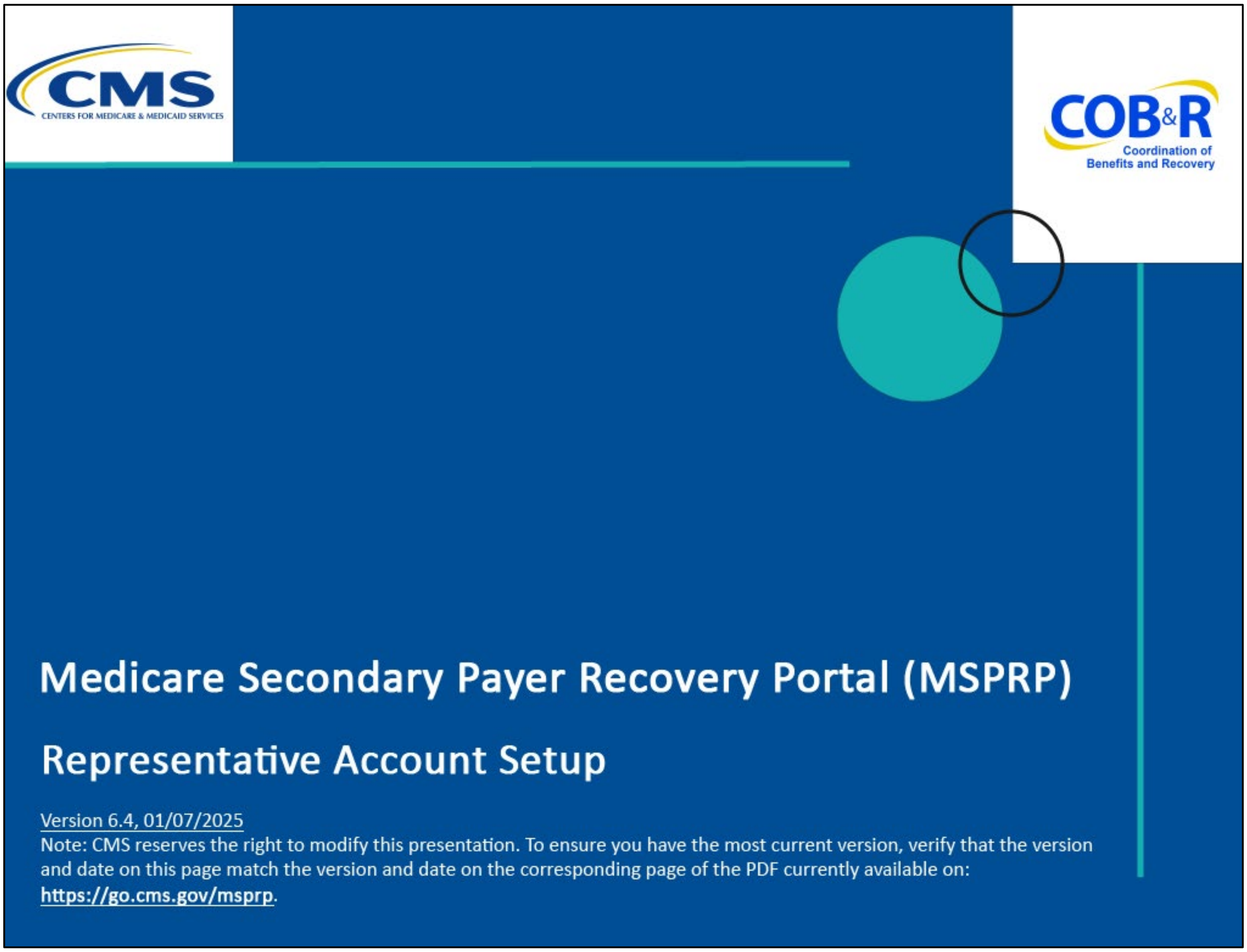
Representative Account Setup Introduction

Slide 1 of 22 - Representative Account Setup Introduction



Slide notes

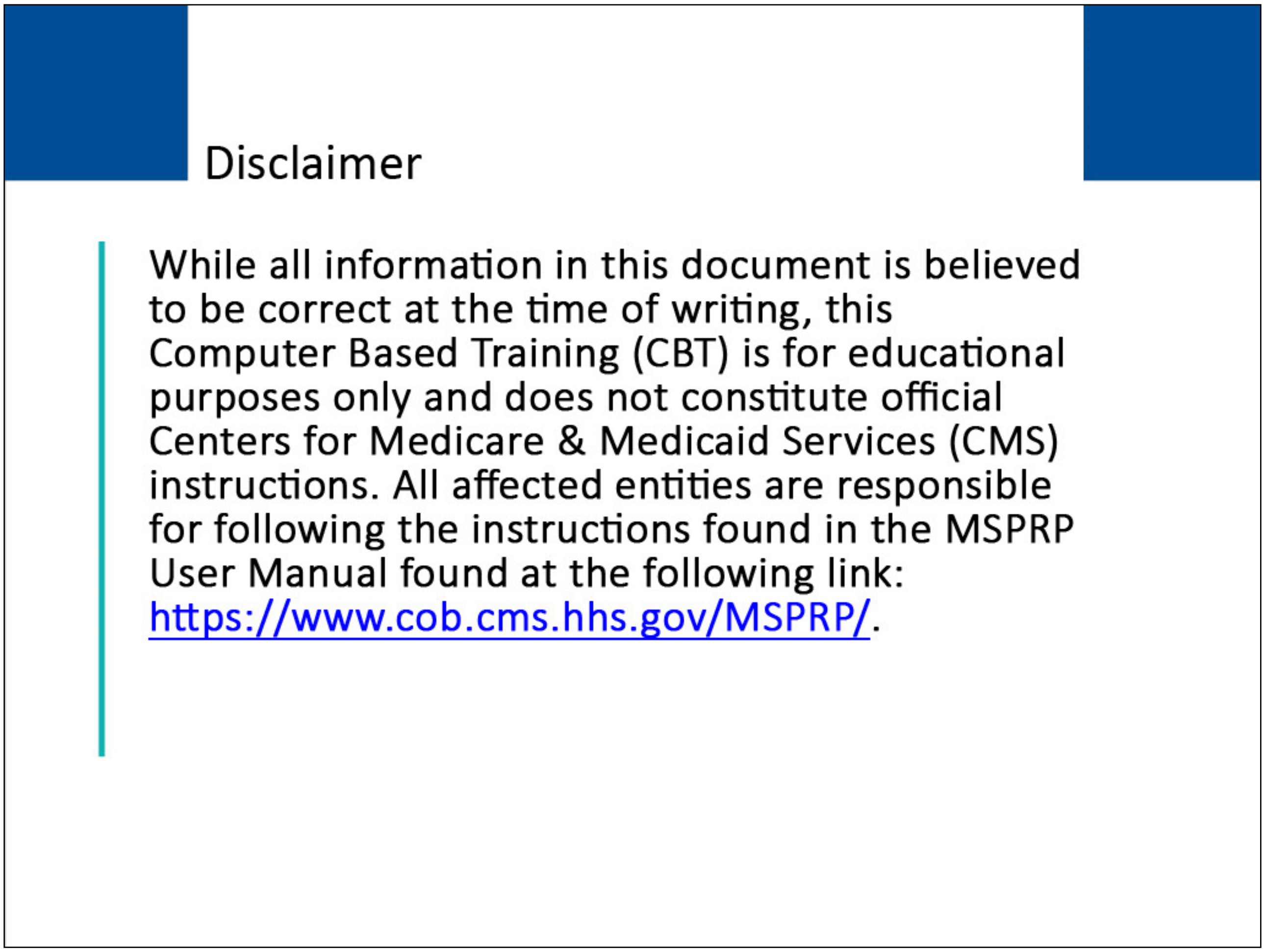
Welcome to the Medicare Secondary Payer Recovery Portal (MSPRP) Representative Account Setup course.

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

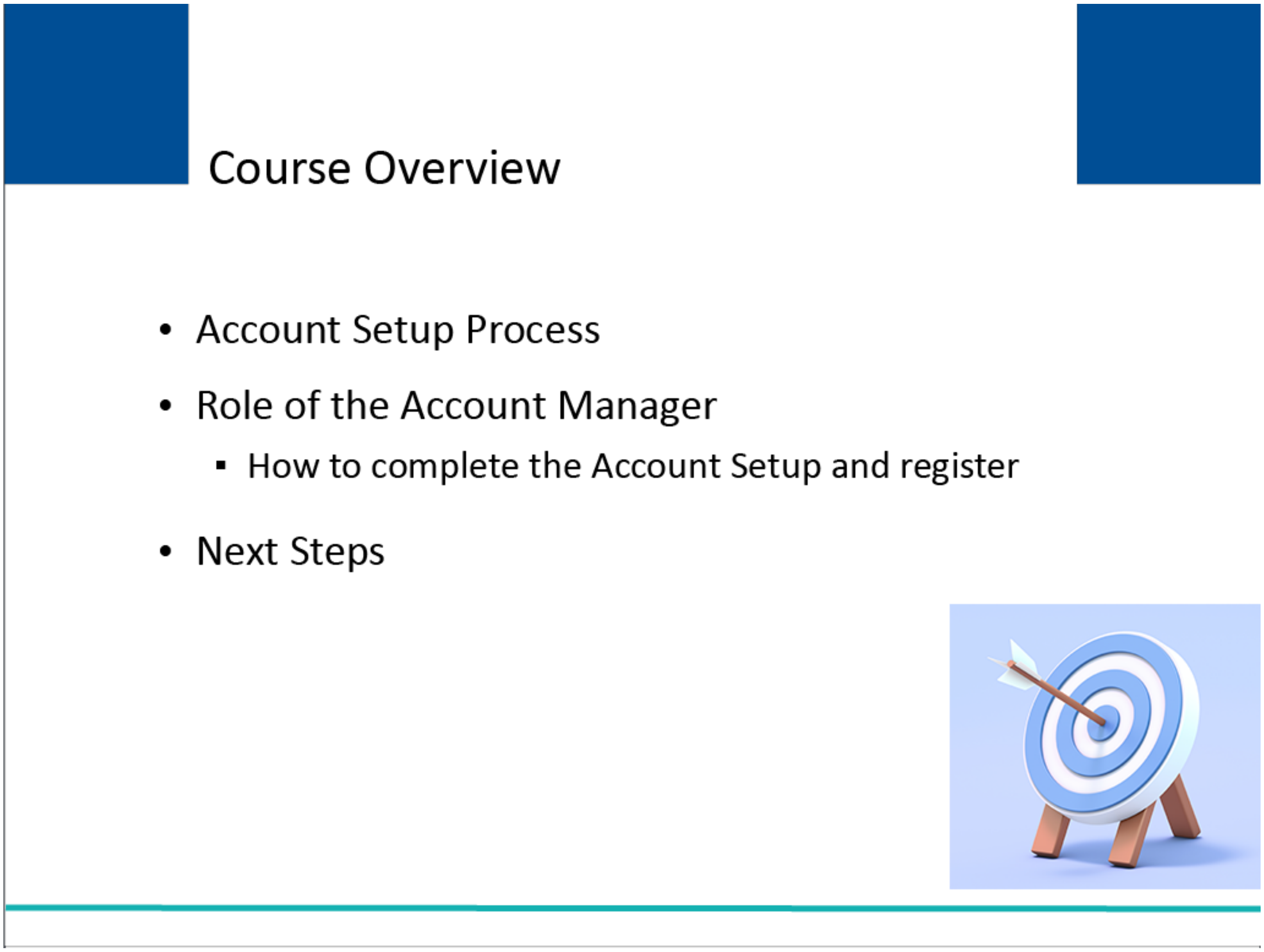


Slide notes

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



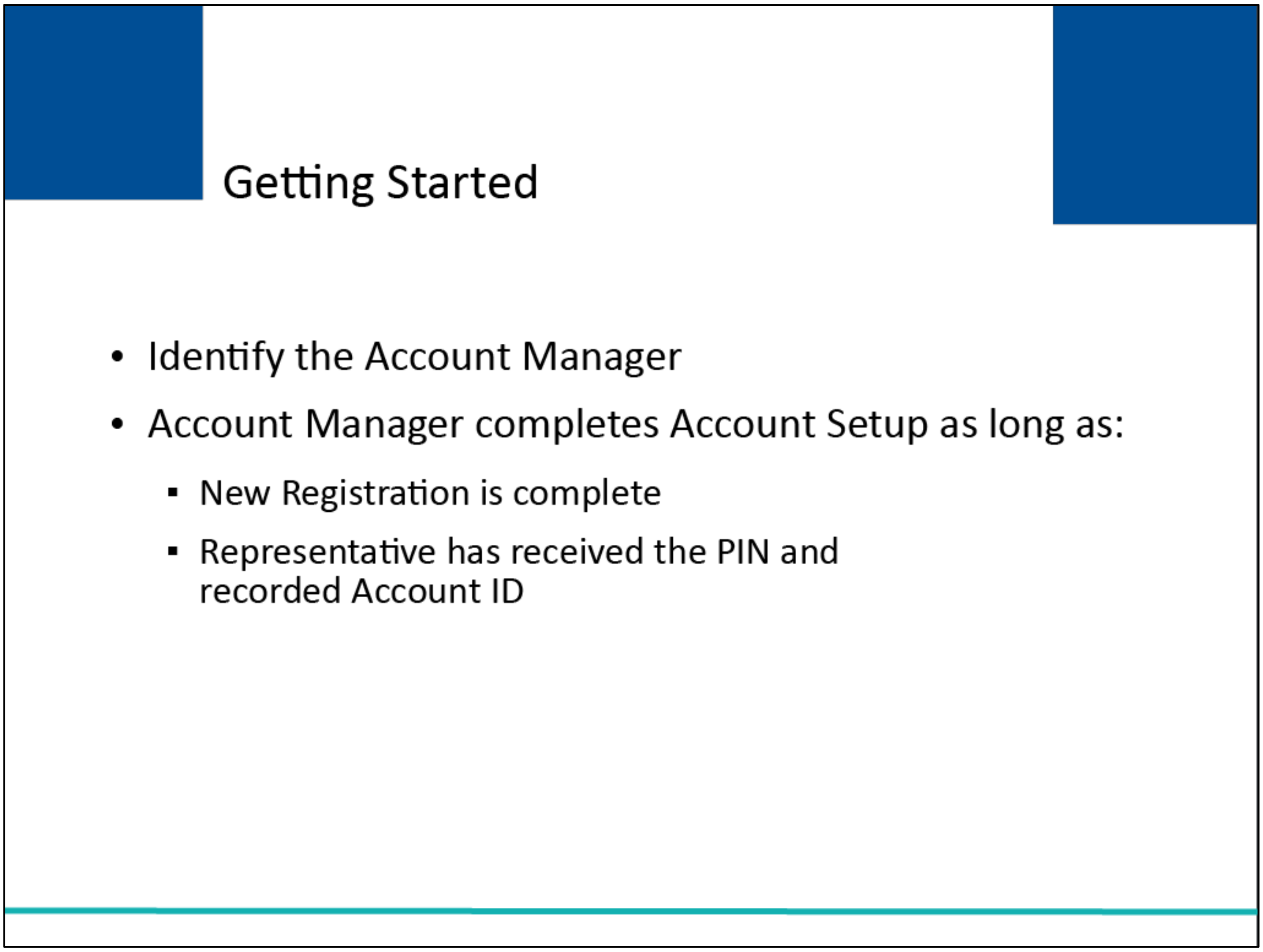
Slide notes

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



Slide notes

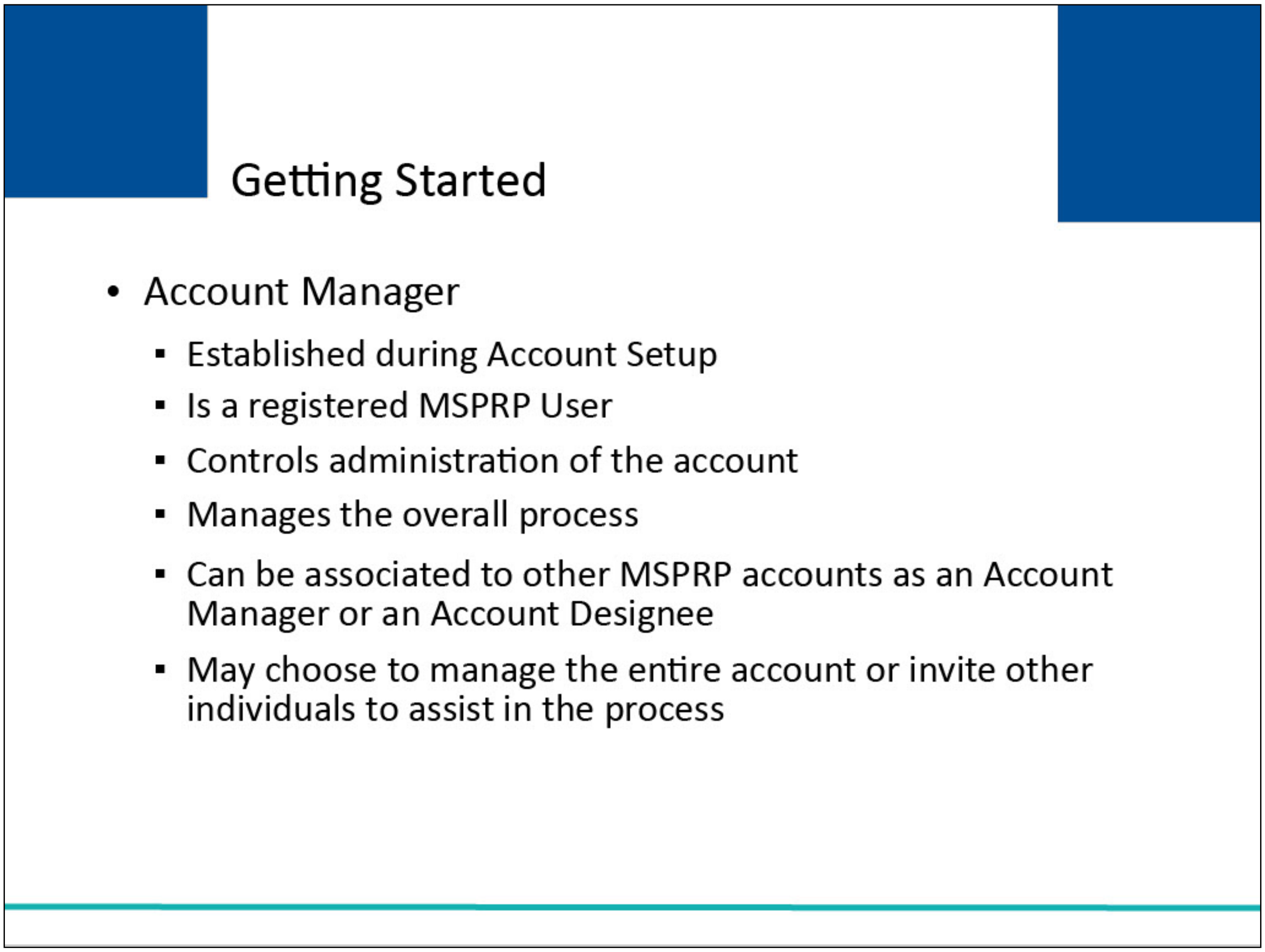
To begin, the Representative must designate the Account Manager. For the Representative account, the Representative may also be the Account Manager.

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



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.

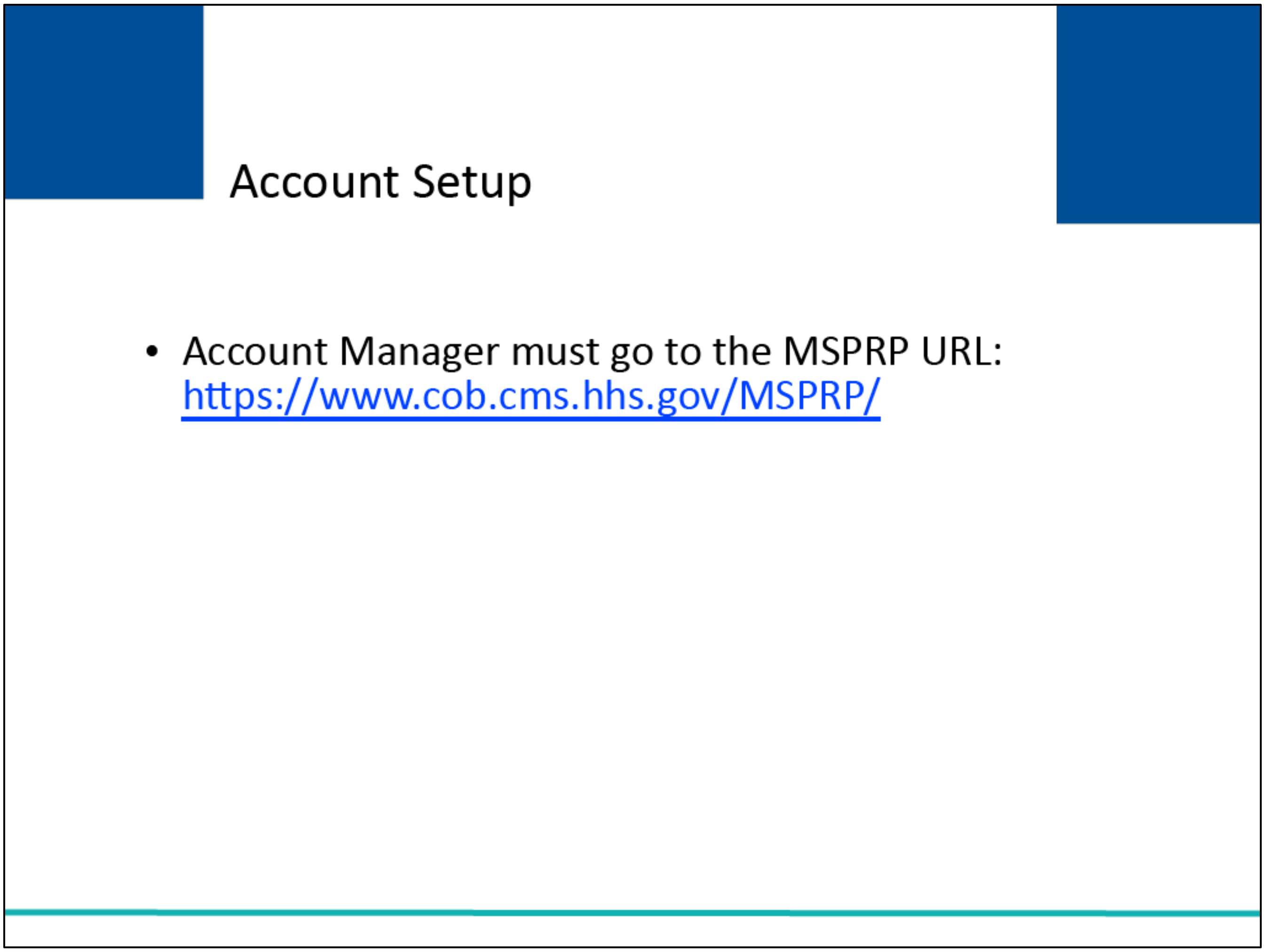
The Account Manager is a registered user of the system. This person controls the administration of an organization’s account and manages the overall process.

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.

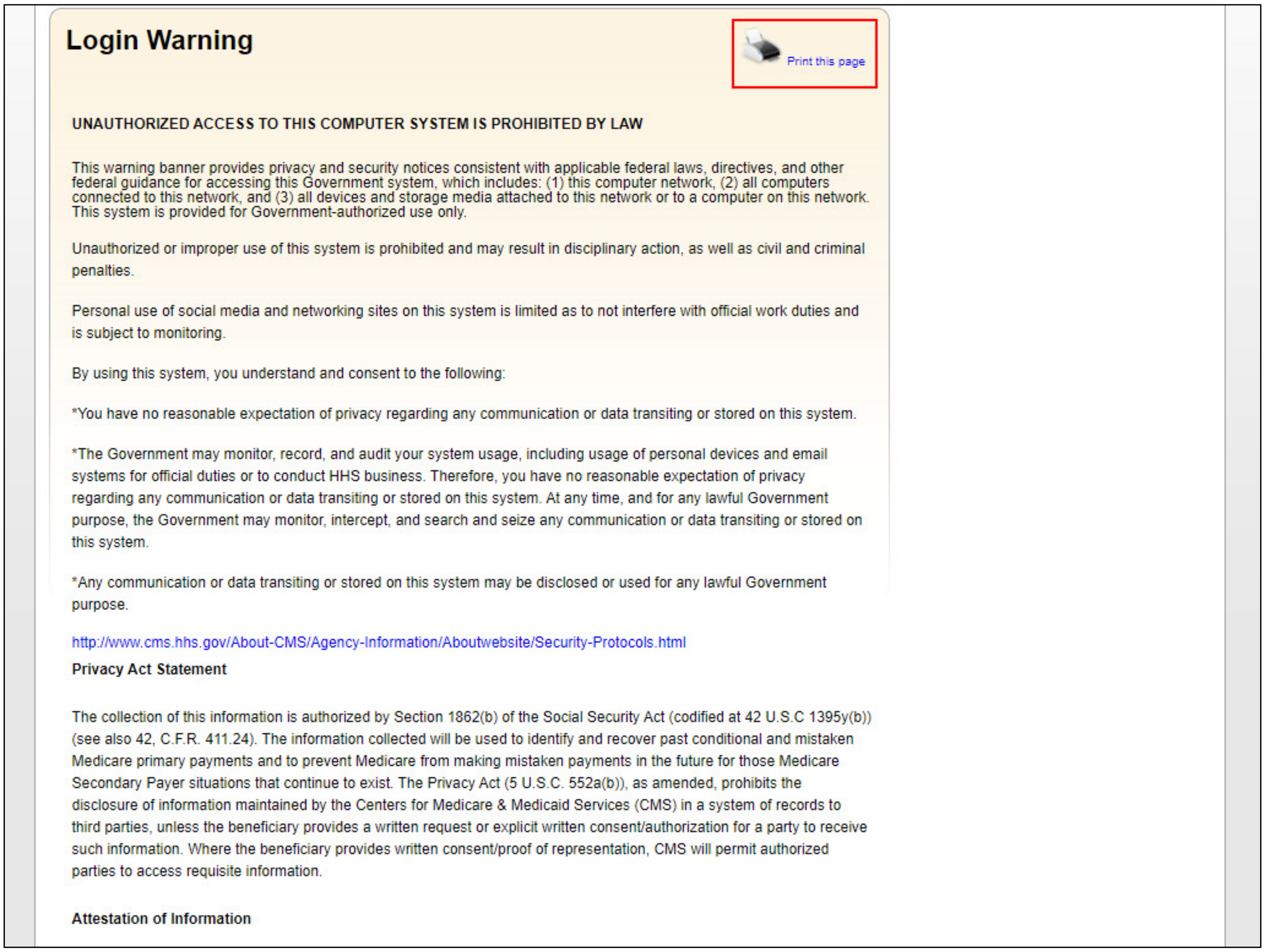
Slide 6 of 22 - Account Setup



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.

Slide 7 of 22 - Login Warning



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.

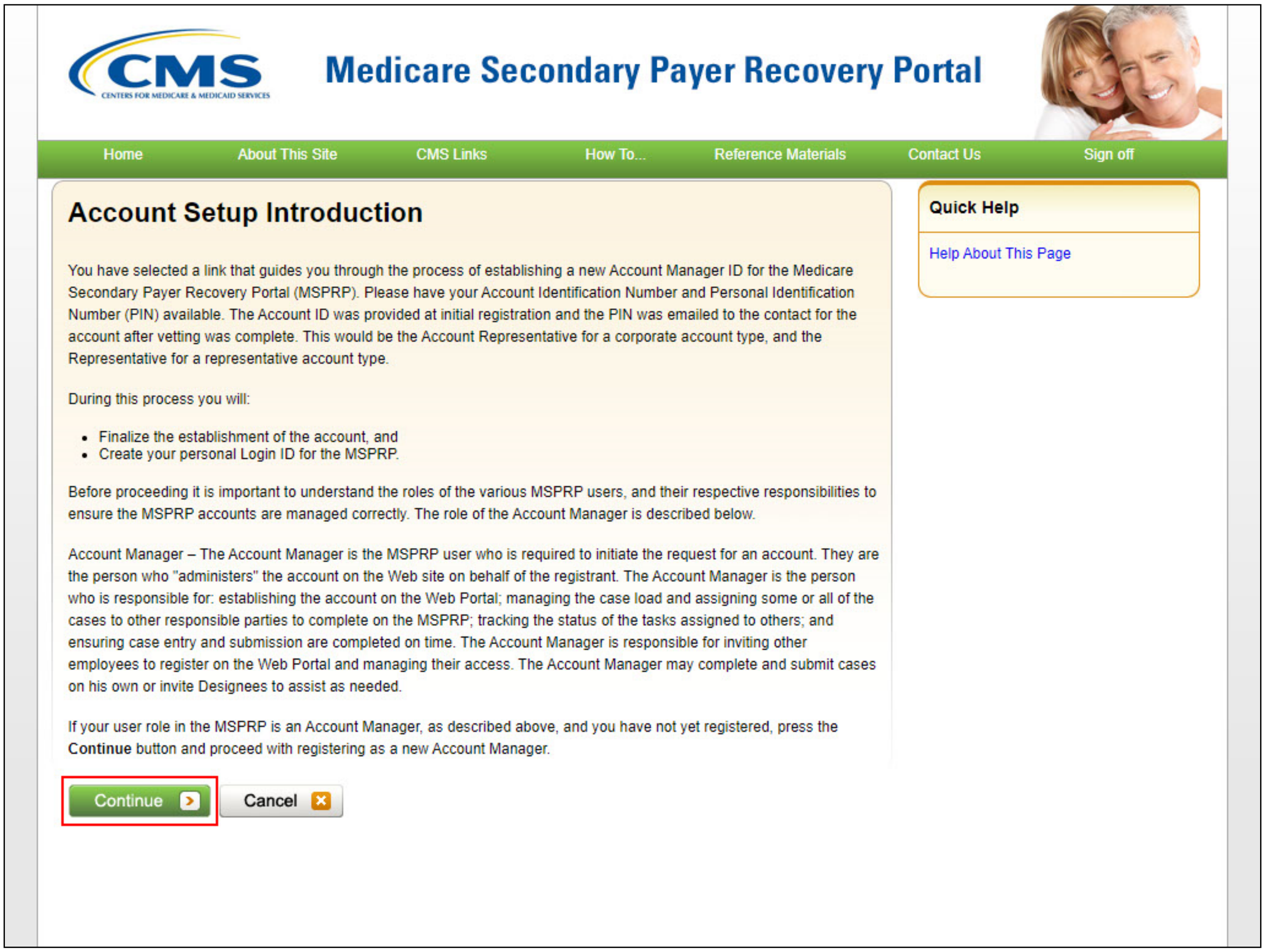
Scroll to the bottom of this page to review the entire statement. Users must agree to the terms of this warning each time they access the MSPRP. Click the [I Accept] link at the bottom of the page to continue.

Slide 8 of 22 - Welcome to the MSPRP

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



Slide notes

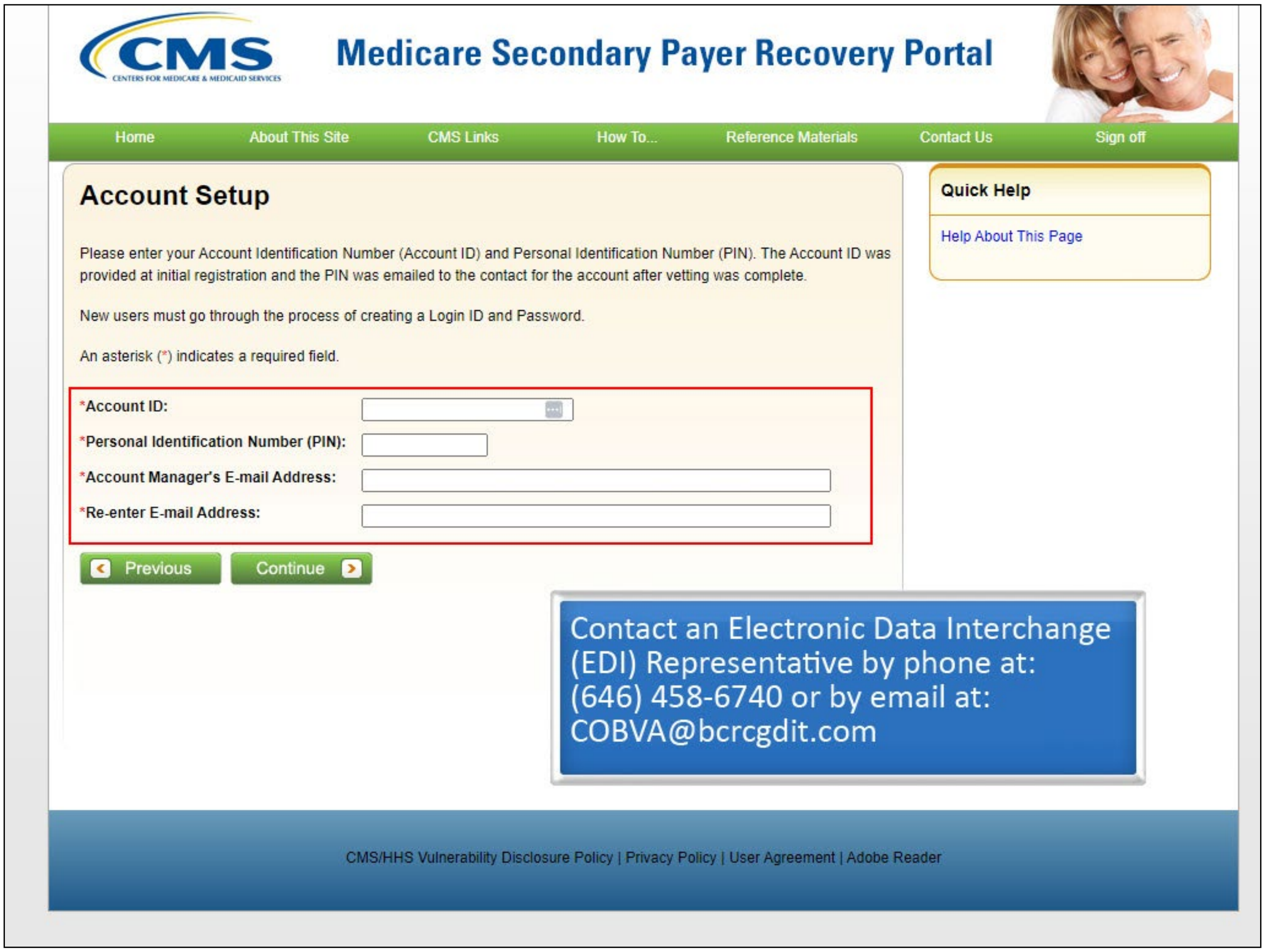
The Account Setup Introduction page will appear. This page describes the Account Setup process and informs the Account Manager of their responsibilities as an MSPRP user.

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.

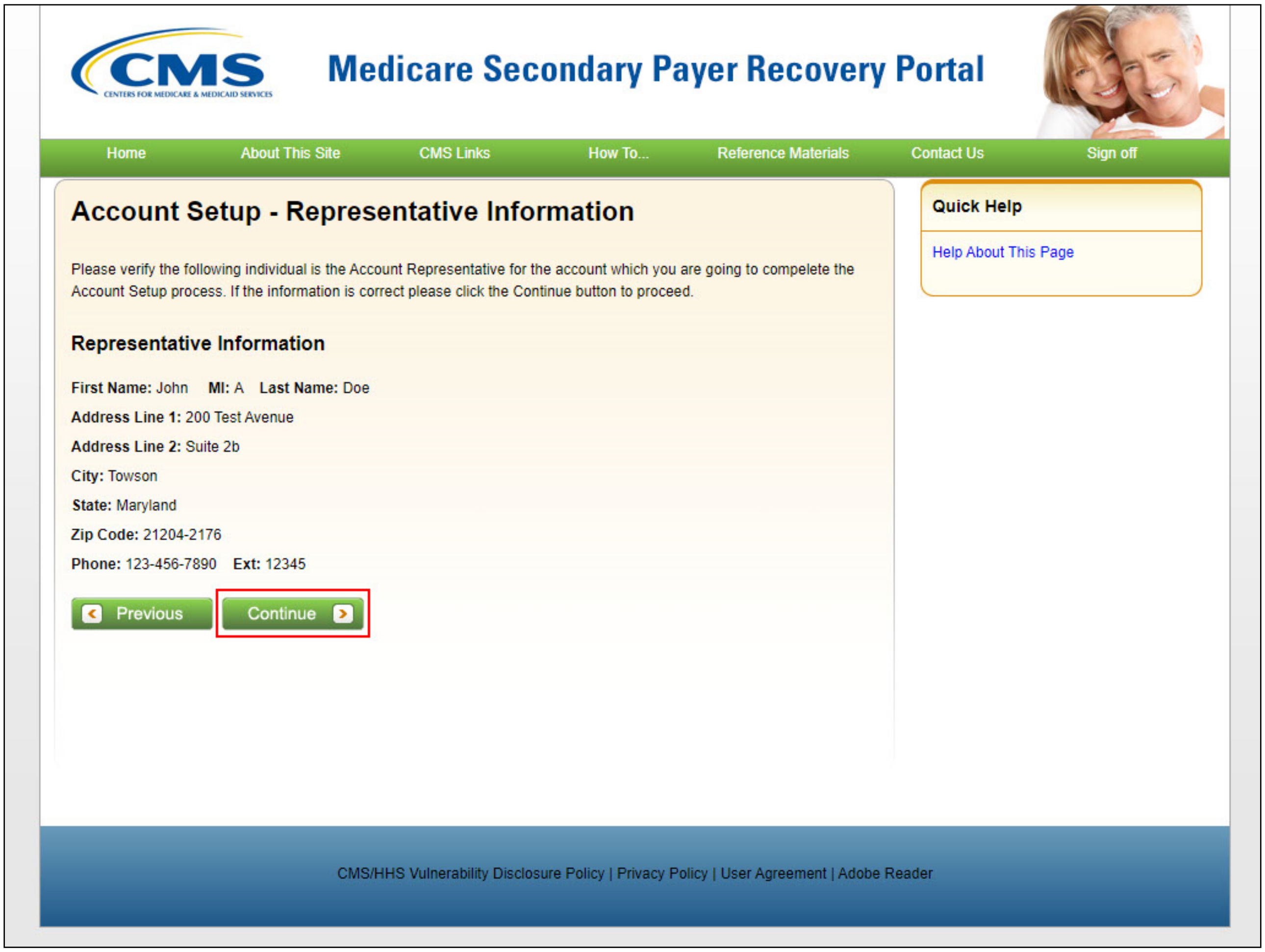
The system will verify that the Account ID and PIN are valid. If either is invalid, an error message will display. If the Account ID and PIN and are entered incorrectly three times, the account will be locked, and setup will be prevented.

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



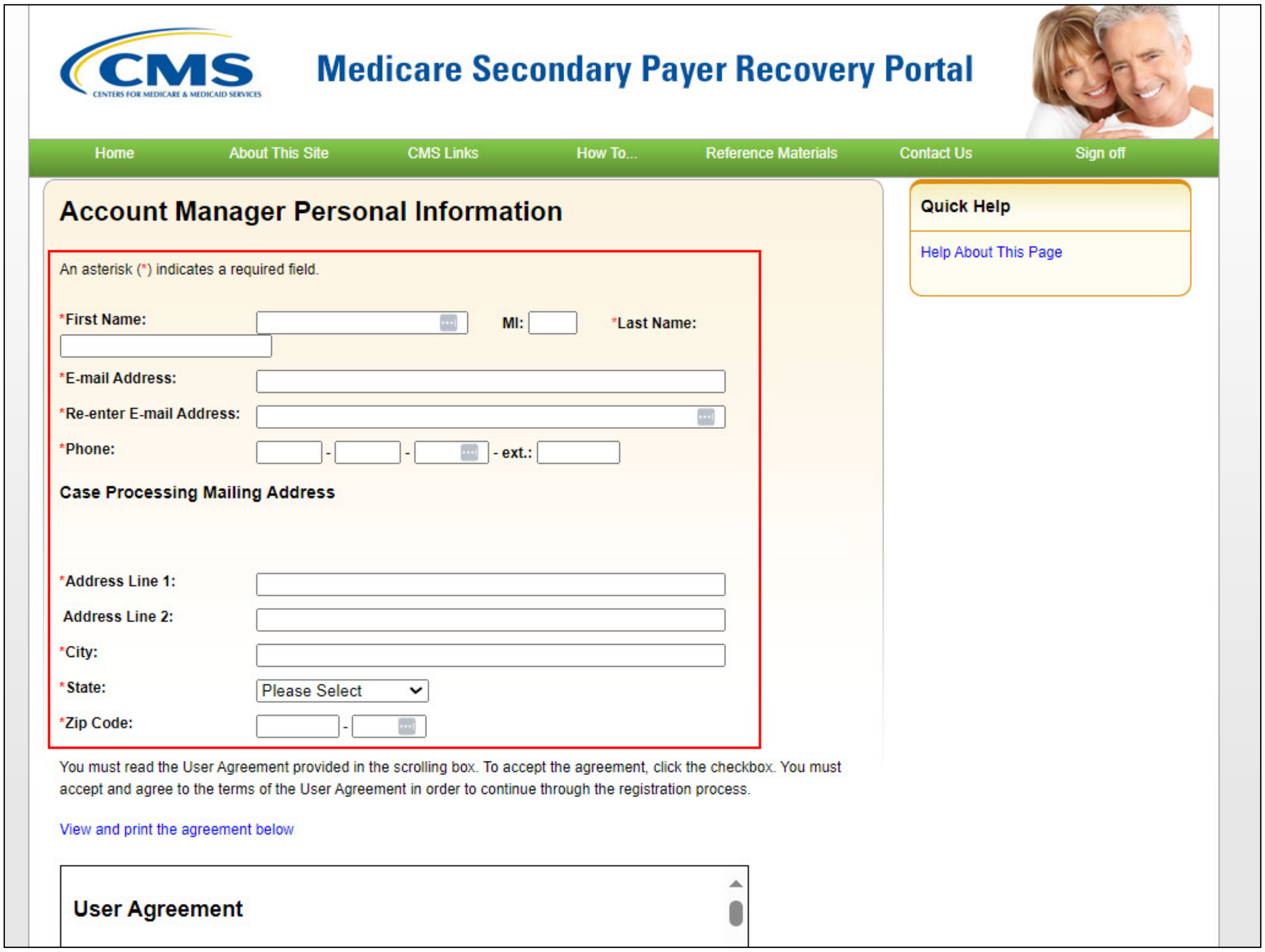
Slide notes

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



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.

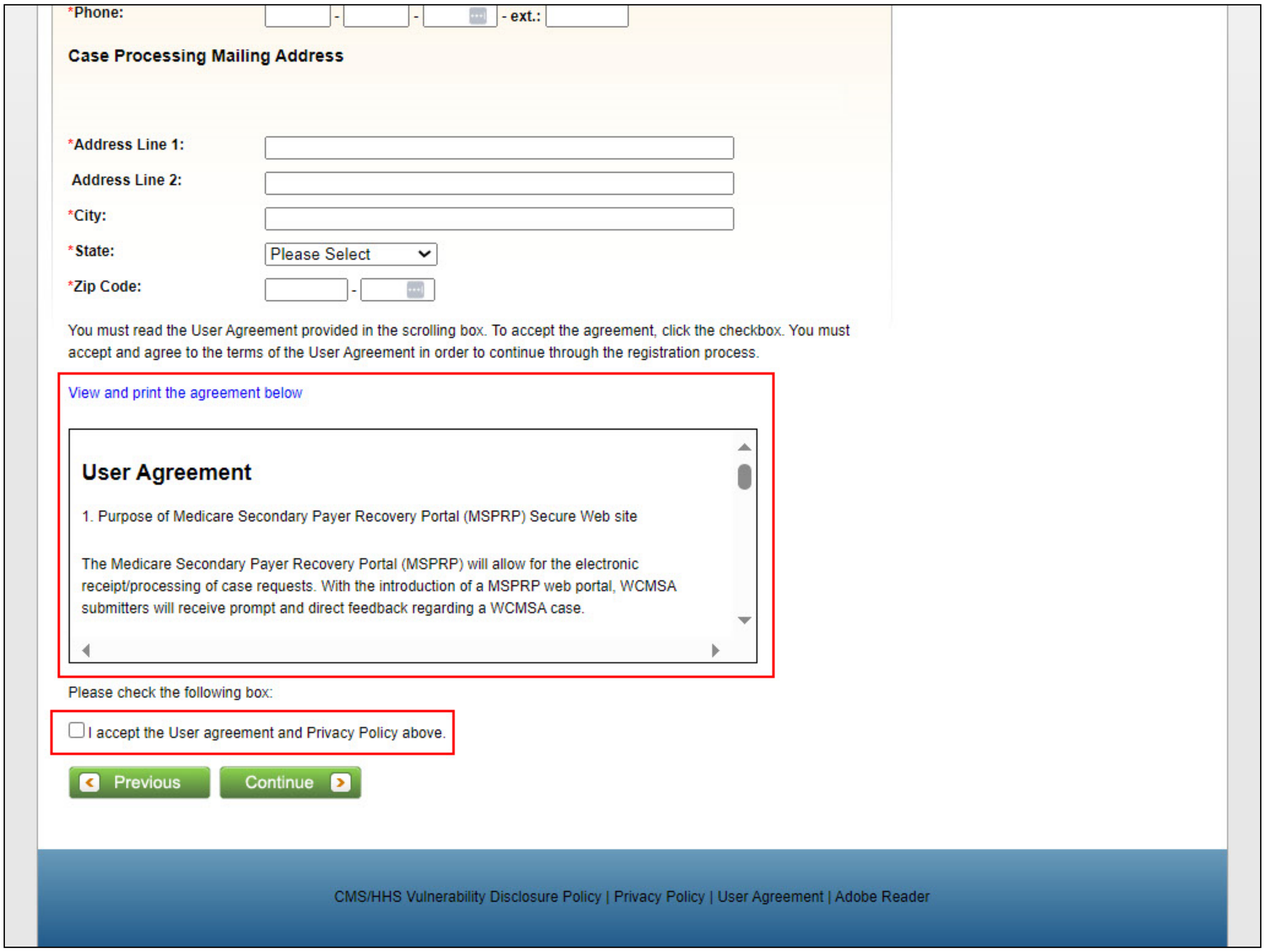
If you have not received any correspondence from Medicare regarding this case, enter the address at which you want correspondence directed.

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

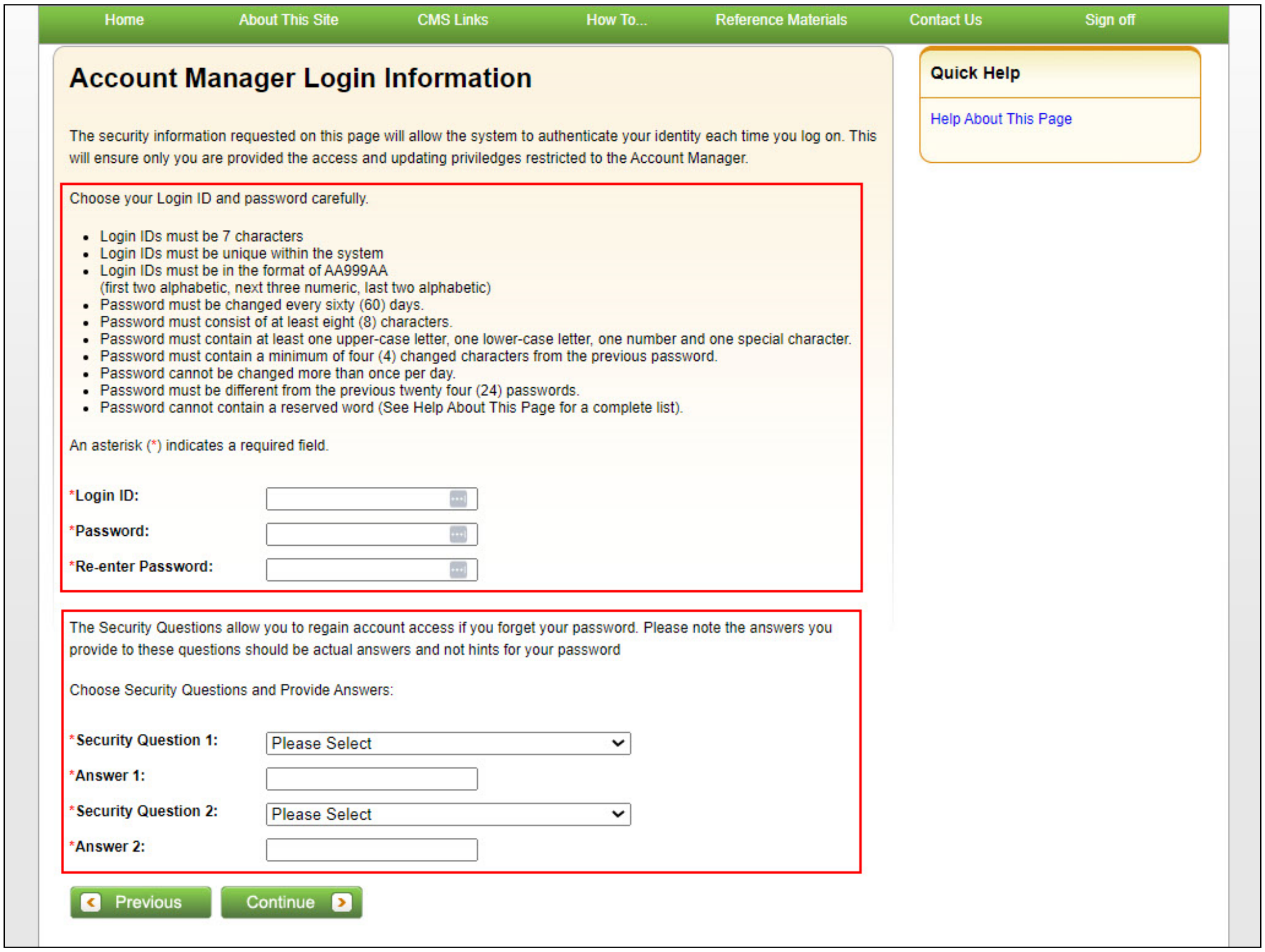


Slide notes

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



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.

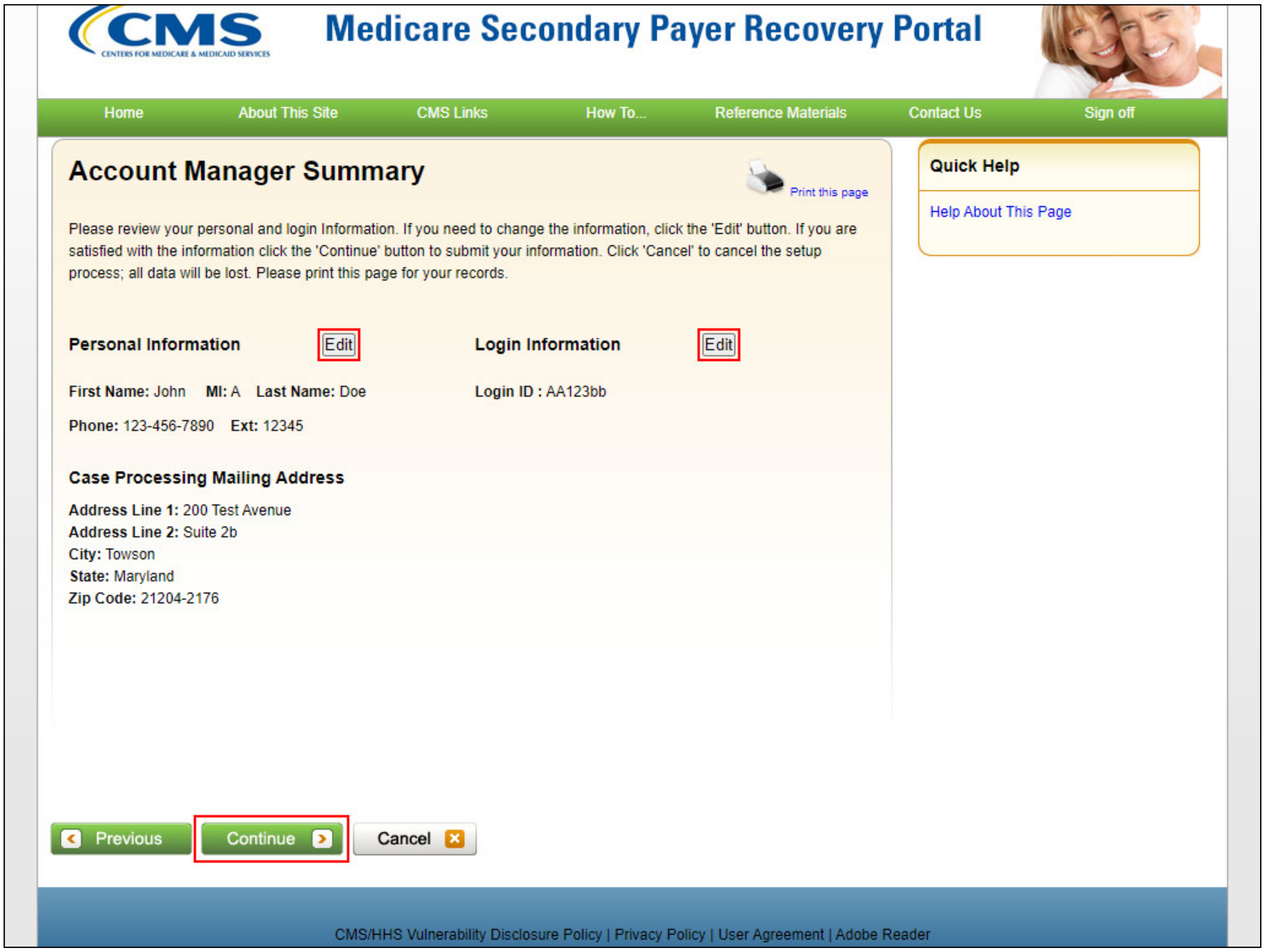
New users must set up a Login ID and Password that conforms to the CMS standard guidelines shown on the slide.

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.

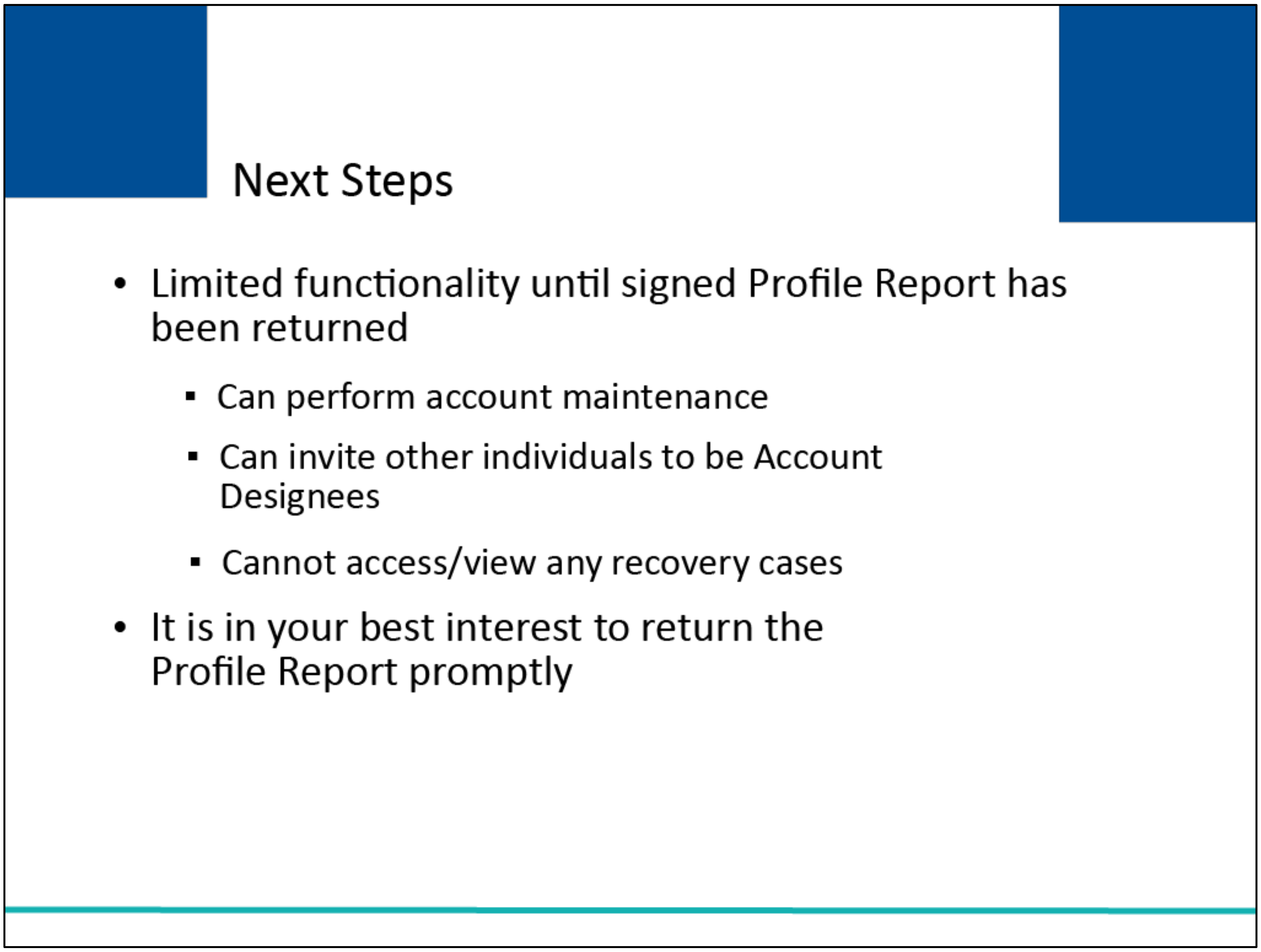
Note: To make corrections to the Recovery Case Mailing Address, click [Edit] for the Personal Information section. When you have verified the information, click [Continue] to proceed with the Account Setup.

Slide 16 of 22 - Thank You

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



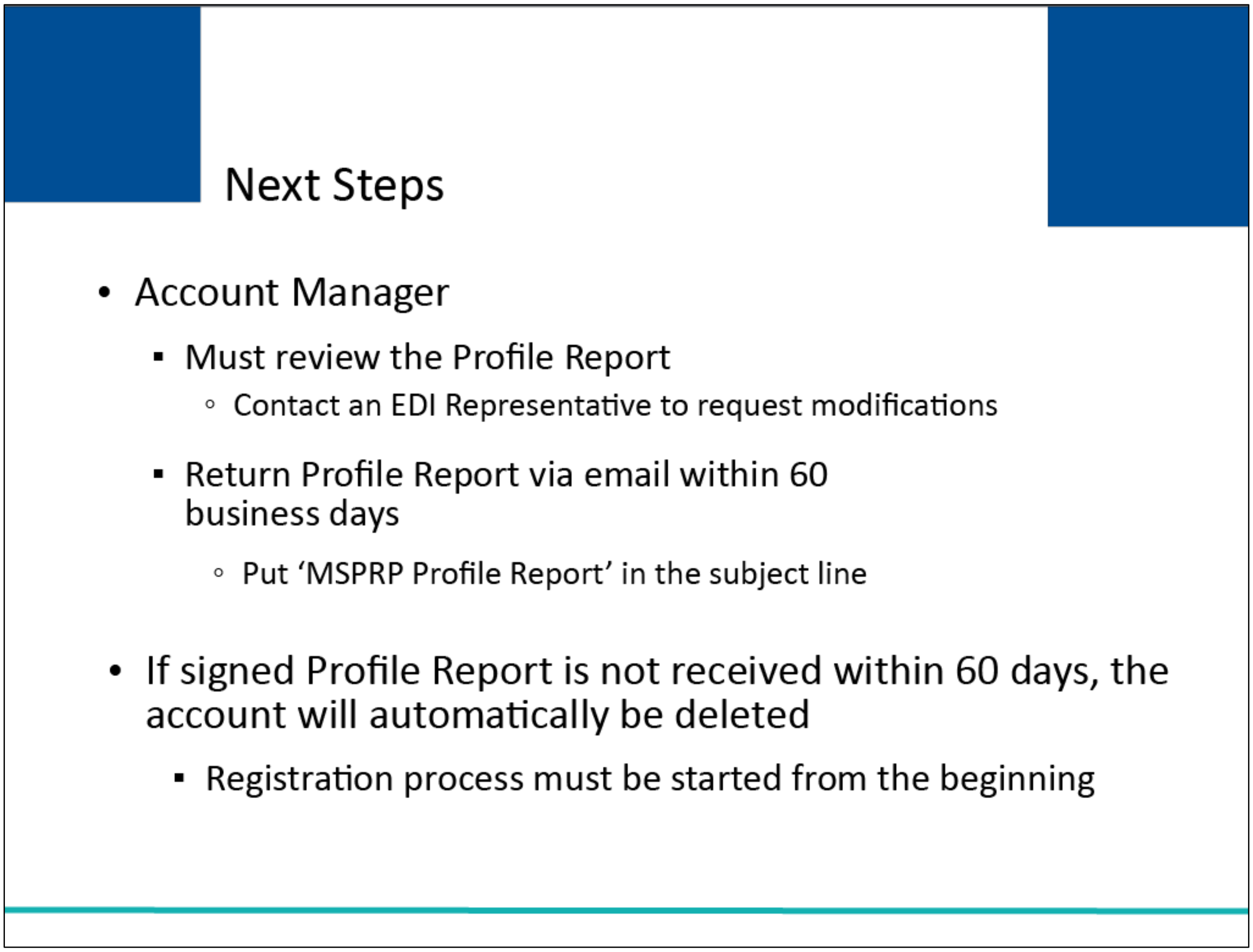
Slide notes

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



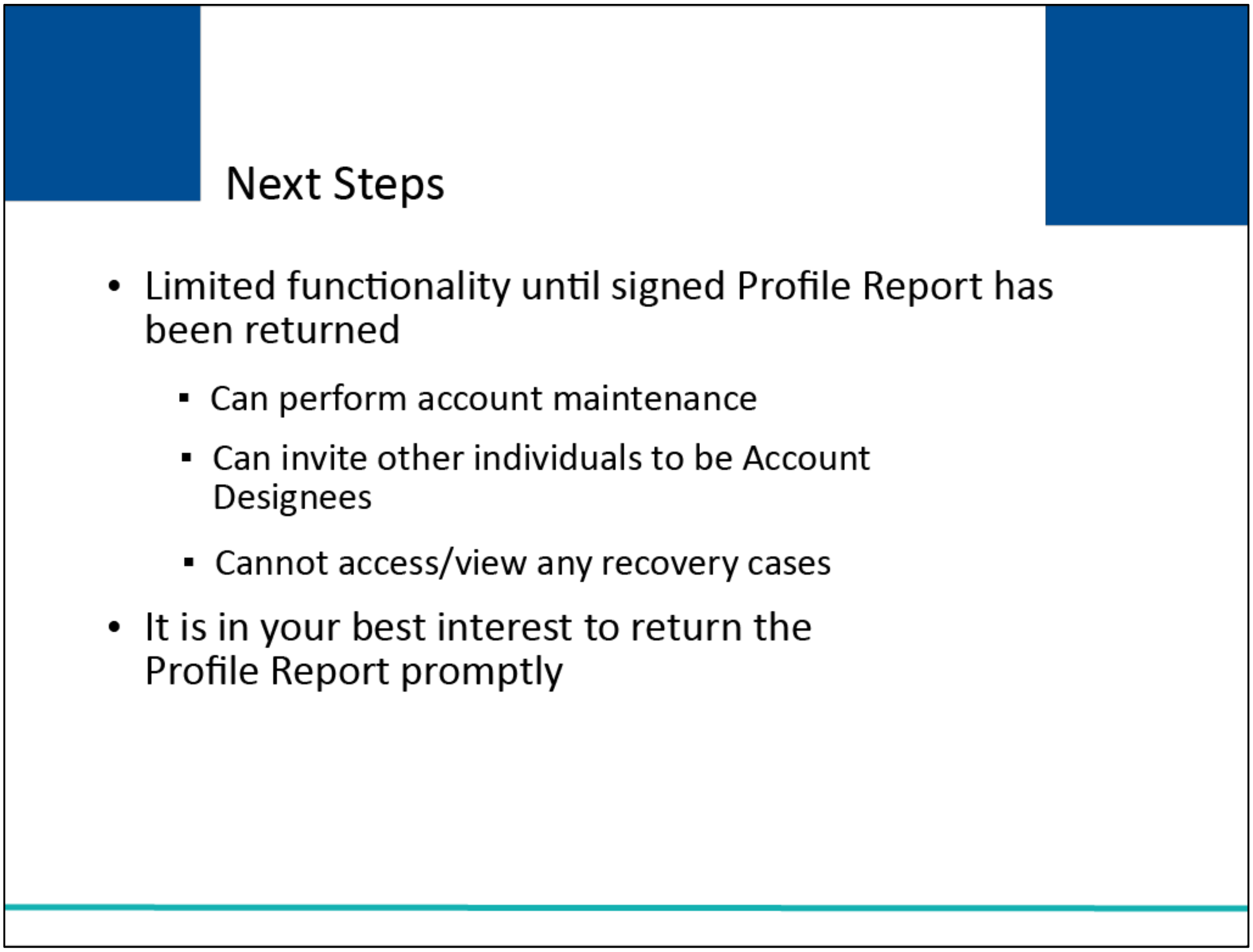
Slide notes

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



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

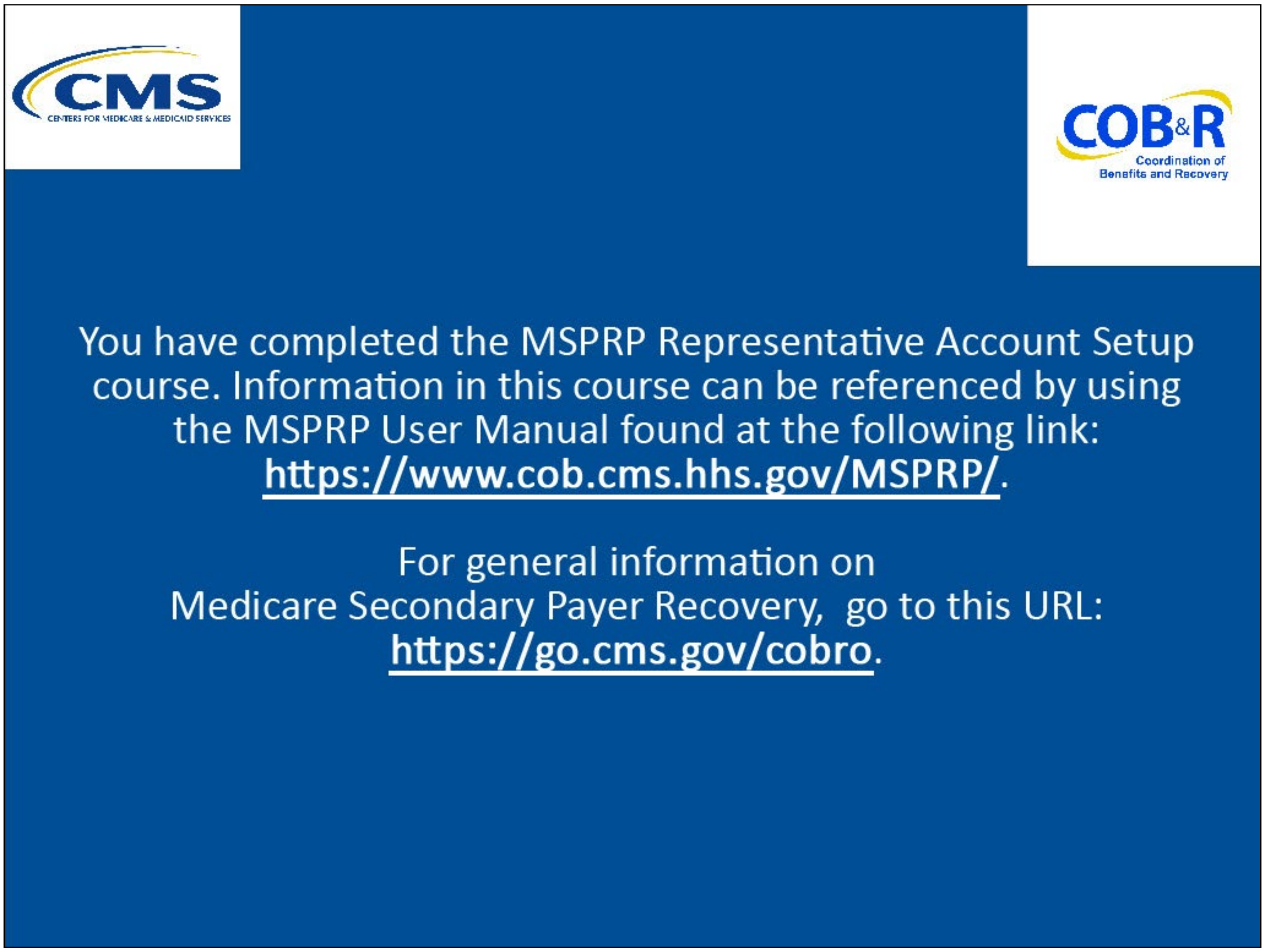
Slide notes

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

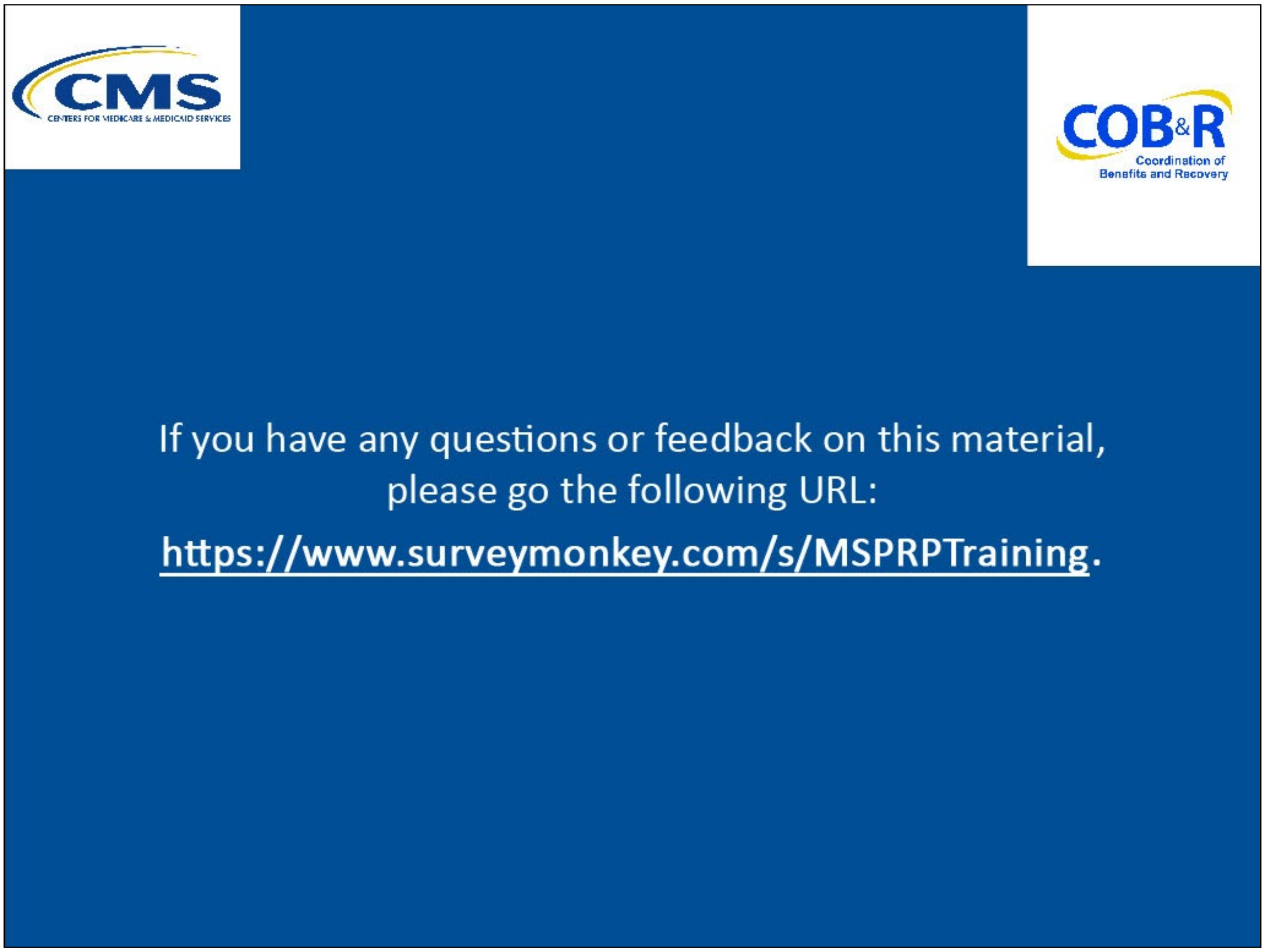


Slide notes

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



Slide notes

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

Training Survey.