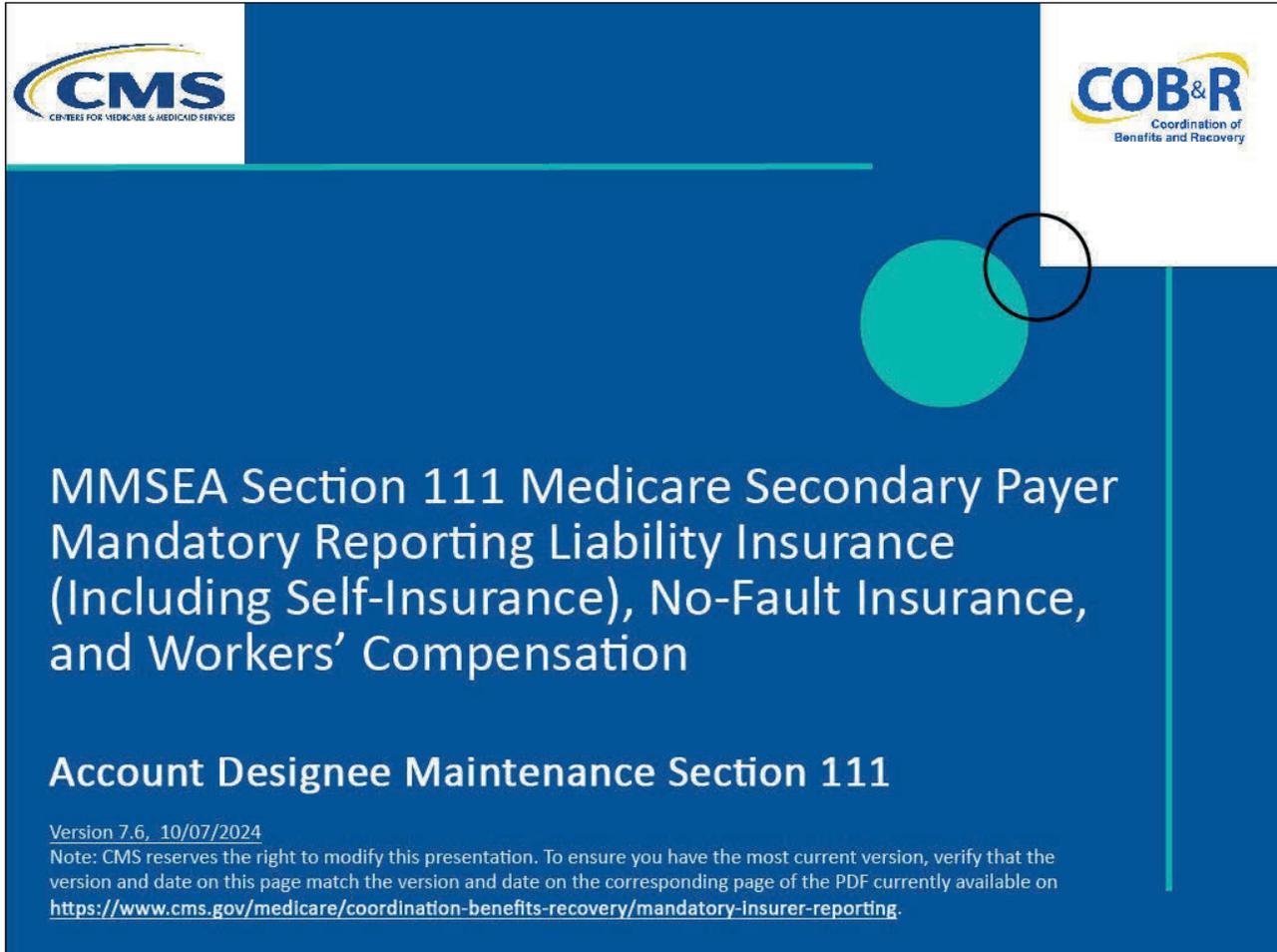


Account Designee Maintenance Section 111

Slide 1 of 40 -Account Designee Maintenance Section 111



The slide features a dark blue background with a teal circle and a white circle with a black outline. 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 title is centered in white text. Below the title is the subtitle 'Account Designee Maintenance Section 111'. At the bottom left, there is a version number and a note about the presentation's currency, with a URL to the PDF version.

**MMSEA Section 111 Medicare Secondary Payer
Mandatory Reporting Liability Insurance
(Including Self-Insurance), No-Fault Insurance,
and Workers' Compensation**

Account Designee Maintenance Section 111

Version 7.6, 10/07/2024
Note: CMS reserves the right to modify this presentation. To ensure you have the most current version, verify that the version and date on this page match the version and date on the corresponding page of the PDF currently available on <https://www.cms.gov/medicare/coordination-benefits-recovery/mandatory-insurer-reporting>.

Slide notes

Welcome to the Section 111 Coordination of Benefits Secure Website (COBSW) Account Designee Maintenance course.

Slide 2 of 40 - 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 for the MMSEA Section 111 implementation. All affected entities are responsible for following the instructions found under the *Reference Materials* menu at the following link:

<https://www.imp.cob.cms.hhs.gov/mra/>.

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 and Medicaid Services (CMS) instructions for the MMSEA Section 111 implementation.

All affected entities are responsible for following the instructions found at the following link: [Section 111 COBSW](#).

Slide 3 of 40 - Course Overview

Course Overview

This course will cover the following Designee Maintenance functions that the Account Manager can perform for the RRE:

- Add/Delete Account Designee
- Add Existing User as Account Designee
- Edit Account Designee Information
- Regenerate Invitation Email

**Slide notes**

To assist with Responsible Reporting Entity (RRE) account management and data file processing, the Account Manager may designate one or more Account Designees to an RRE.

This course will cover the following Designee Maintenance functions that the Account Manager can perform for the RRE:

- adding/deleting an Account Designee,
- adding an existing user as an Account Designee,
- editing Account Designee information, and
- regenerating the invitation email.

Slide 4 of 40 - PAID Act

PAID Act

The Medicare Secondary Payer (MSP) policy is designed to ensure that the Medicare Program does not pay for healthcare expenses for which another entity is legally responsible. To aid settling parties in determining this information, Congress has enacted the Provide Accurate Information Directly Act also known as the PAID Act requiring that CMS provide Non-Group Health Plans with a Medicare beneficiary's Part C and Part D enrollment information for the past 3 years.

This information will be provided both online and offline in the NGHP Query Response File. Additionally, CMS has requested that this solution also include the most recent Part A and Part B Entitlement dates.

**Slide notes**

The Medicare Secondary Payer (MSP) policy is designed to ensure that the Medicare Program does not pay for healthcare expenses for which another entity is legally responsible. To aid settling parties in determining this information, Congress has enacted the Provide Accurate Information Directly Act also known as the PAID Act requiring that CMS provide Non-Group Health Plans with a Medicare beneficiary's Part C and Part D enrollment information for the past three years.

This information will be provided both online and offline in the NGHP Query Response File. Additionally, CMS has requested that this solution also include the most recent Part A and Part B Entitlement date.

Note: To support the PAID Act, the Query Response File will be updated to include Contract Number, Contract Name, Plan Number, Coordination of Benefits (COB) Address, and Entitlement Dates for the last three years (up to 12 instances) of Part C and Part D coverage. The updates will also include the most recent Part A and Part B entitlement dates.

Slide 5 of 40 - Adding an Account Designee

Adding an Account Designee

- Account Manager may designate Account Designees
 - Assist Account Manager with reporting process



Slide notes

At the RRE's discretion, the Account Manager may designate other individuals to register as users of the Section 111 COBSW associated with the RRE's account known as Account Designees.

These individuals assist the Account Manager with the reporting process.

Slide 6 of 40 - Adding an Account Designee

Adding an Account Designee

- Account Manager logs into Section 111 COBSW
- Enter Account Designee email address



Slide notes

To add an Account Designee, the Account Manager must first log into the Section 111 COBSW.

Once they have successfully signed in, they can invite an individual to become an Account Designee for an RRE ID.

The Account Manager will be prompted to enter and re-enter the email address for the person they are inviting.

The system will check to see if the entered email address is for a new user.

Slide 7 of 40 - Adding an Account Designee

Adding an Account Designee

- Account Manager enters:
 - Full Name
 - Passphrase
 - Short case-sensitive phrase
 - Word(s) up to 30 characters
 - Must be conveyed to Account Designee verbally
- Account Designee:
 - Receives invitation email and follows link
 - Enters Passphrase
 - Do not share

Slide notes

The Account Manager will need to enter the invited Account Designee's first name, last name, and create a Pass Phrase.

The Pass Phrase should be a short case-sensitive phrase, of the Account Manager's creation, that is a word or words up to 30 characters.

Be careful to remember the exact wording because the Account Designee must enter the same text to complete a successful registration.

After the Account Manager completes the invitation process, he/she will need to contact the Account Designee and provide him/her with this secret code verbally and outside the system.

It will not be sent to the Account Designee in his/her invitation email. The Account Designee will receive an invitation email to register for the site.

He/she should follow the link and enter the Pass Phrase exactly as the Account Manager did. This will make sure that only the people invited will have access to the account.

Do not share this Pass Phrase with anyone else.

Slide 8 of 40 - Section 111 Mandatory Reporting Website Usage Warning

Section 111 Mandatory Reporting Website Usage 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.

<https://www.imp.cob.cms.hhs.gov/mra/>

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:

- 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.

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

The information provided is complete, truthful, accurate, and meets all requirements set forth to use this process.
LOG OFF IMMEDIATELY if you do not agree to the conditions stated in this warning.

Accept

Slide notes

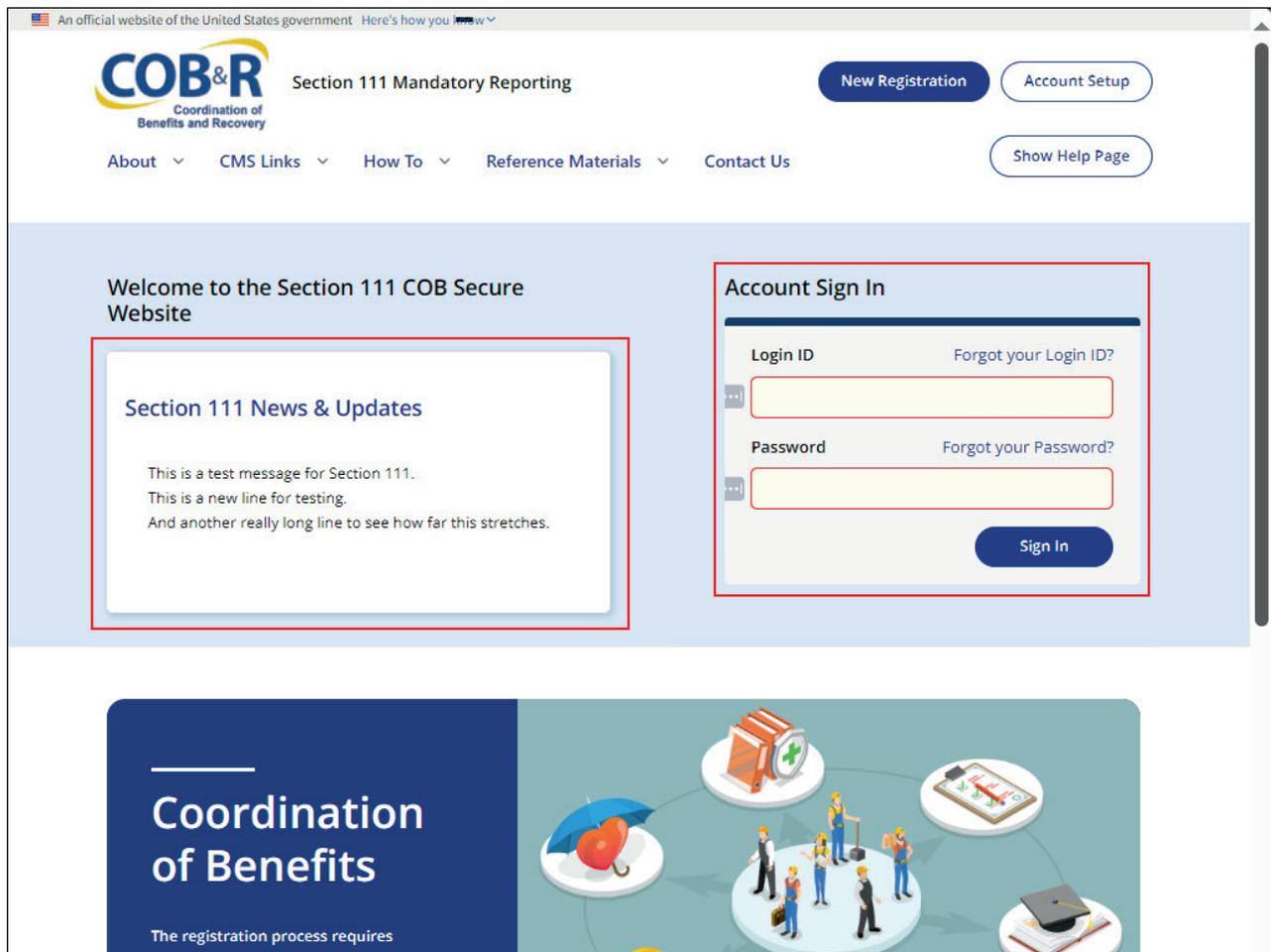
Enter the following URL into your web browser to access the COBSW Section 111 application: [COBSW Section 111 Website](https://www.imp.cob.cms.hhs.gov/mra/).

The Section 111 Mandatory Reporting Website Usage Warning page will appear detailing the Data Use Agreement (DUA).

You may print this page by clicking the Print link in the upper right-hand corner of the page.

Review the DUA and click I Accept at the bottom of the page to proceed to the Welcome page.

Slide 9 of 40 - Welcome to the Section 111 COB Secure Website/Sign In Page



Slide notes

The Welcome to the Section 111 COB Secure Website/Sign In page will appear.

The Section 111 News & Updates area of the Sign In page may contain important system messages so you should pay close attention to this section each time you access the system.

Enter your Login ID and your Password, and then click Sign In.

Slide 10 of 40 - RRE Listing Page

July 29, 2024 at 1:46:48 PM

RRE Listing

This page lists all the Responsible Reporting Identification Numbers (RRE IDs) with which you are associated. You can select an individual RRE from the list to see Actions available for the selected RRE ID.

The list may be sorted by selecting the title of the column you wish to sort. Selecting the same column again will reverse the sort order for the column. Clear

The list may be filtered by entering values in the columns you wish to filter. To remove a filter, simply remove the value from the filter row, or select the **Clear** button. Selecting the **Clear** button will remove all filters.

RRE Listing Export

RRE ID ↑↓	Name ↑↓	RRE Status ↑↓	Submission Period ↑↓	Reporting Option ↑↓	Profile Report Status ↑↓	User Role ↑↓	EDI Representative ↑↓	EDI Contact Info
<input type="text" value="RRE ID Filr"/>	<input type="text" value="RRE Name F"/>	<input type="text" value="RRE Status Fil"/>	<input type="text" value="Submission Period"/>	<input type="text" value="Reporting Optio"/>	<input type="text" value="Profile Report S"/>	<input type="text" value="User Role F"/>	<input type="text" value="EDI Representative Fil"/>	
145691	NGHP Basic	Production	06	Expanded	Delinquent	AM	Fran Williams	(800) 879-4592 FWilliams@bcrcgdit.com
145687	GHP Expanded	Production	02	Basic	Recertified	AM	Lisa Smith	(800) 879-4587 Lsmith@bcrcgdit.com
145688	NGHP DDE	Test	0	DDE	N/A	AM	Izzy Kay	(800) 879-4588 Ikay@bcrcgdit.com
145689	GHP Basic	Setup		Basic	N/A	AD	Rose George	(800) 879-4589 Rgeorge@bcrcgdit.com
145690	VDSA	Production	01	Expanded	Not Due	AM	Tim Baldwin	(800) 879-4590

Slide notes

The RRE Listing Page will appear. Find the desired RRE in the table and select the link under the RRE ID.

Slide 11 of 40 - RRE Information Detail Page

The screenshot displays the 'RRE Information Detail' page within the COB&R (Coordination of Benefits and Recovery) system. The page header includes the COB&R logo, the title 'Section 111 Mandatory Reporting', a user profile for 'Mike Brown (ts111st)', and a 'Print' button. A navigation menu contains 'About', 'CMS Links', 'How To', 'Reference Materials', and 'Contact Us', along with a 'Show Help Page' button. The breadcrumb trail shows 'Information Detail'. The main content area is titled 'RRE Information Detail' and includes a timestamp of 'July 29, 2024 at 4:33:26 PM'. Two paragraphs of text provide instructions on recertification: the first states that profile reports must be recertified annually and that users should click the 'Recertify' button if the due date has passed; the second notes that inaccuracies should be corrected via the 'Edit' button before recertifying. Below the text are three data panels: 'Profile Report Information' (Reporter ID: 10000, Recertification Due Date: 10/08/2022, Profile Report Date: 03/01/2024, Last Recertification Submission Date: 01/21/2024, Profile Changed Date: 03/01/2024), 'EDI Representative' (Name: TODD BANNAR, Email: DL-HIT-MSPSC-SPRING_BATCH_SUPPORT@RANDOM.COM, Phone: (410) 842-1404), and 'RRE Company Information'. An 'Actions' section at the bottom right contains a link for '> File Processing Results'.

Slide notes

The RRE Information Detail page will appear. You will need to use the scroll bar on the far right-hand side of the page to scroll down to the Actions links of the page to access the Designee Maintenance link for the selected RRE ID.

Slide 12 of 40 - Designee Maintenance Action Link

The screenshot displays a web interface with several sections:

- Profile Report Information:**

Reporter ID:	10000	Recertification Due Date:	10/08/2022
Profile Report Date:	03/01/2024	Last Recertification Submission Date:	01/21/2024
Profile Changed Date:	03/01/2024		
- EDI Representative:**

Name: TODD BANNAR
Email: DL-HIT-MSPSC-SPRING_BATCH_SUPPORT@RANDOM.COM
Phone: (410) 842-1404
- RRE Company Information:**

Reporter Type:	GHP	Address:	02611 Testing Dr Towson, MD 12312 - 12312	Phone:	(111) 111-1112
Name:	Dynamics Inc	Fax:	(410) 555-1632		
TIN:	36978542	Lines of Business:	Hospital, Medical, Prescription Drug	HRA Records Only:	No
NAIC:	1111111			Unsolicited Alerts:	No
- Authorized Representative Information:** (Section header visible)
- Actions:** A list of links including:
 - > File Processing Results
 - > Test File Results
 - > Upload File
 - > Designee Maintenance (highlighted with a red arrow)
 - > View Account Activity
 - > New Claim
 - > Claim Listing
 - > Register for DDE
 - > Beneficiary Lookup
 - > TIN Record Maintenance
 - > Remove RRE

Slide notes

From the Actions links, select the Designee Maintenance link.

Slide 13 of 40 - Designee Listing Page

An official website of the United States government

COB&R Section 111 Mandatory Reporting
Coordination of Benefits and Recovery

Mike Brown (ts111st) Print

About CMS Links How To Reference Materials Contact Us Show Help Page

Information Detail Designee Maintenance

August 22, 2024 at 1:43:33 PM

Designee Listing

RRE ID: 145688 **RRE Name:** University of Towson Health Systems

To add an Account Designee for this RRE ID, click on the Add a Designee button. Designees will receive an E-mail notifying them that they have been added to the account and how to obtain a Login ID.

To remove an Account Designee for this RRE ID, click on the Delete icon to the left of the Designee's Last Name.

To update an Account Designee's information or regenerate the invitation E-mail, click on the link formed by the Designee's Last Name.

Clear

Delete	Last Name	First Name	E-mail Address	Passphrase	Account Status	Last Login Date
	<input type="text" value="Last Name Filter"/>					
×	Last	First	123@abc.com	passPhrase	PENDING	
×	Richards	Adam	321@abc.com	Welcome	ACTIVE	01/01/2024

Showing 1 to 2 of 2 entries << < 1 > >>

Add Designee RRE Information

Slide notes

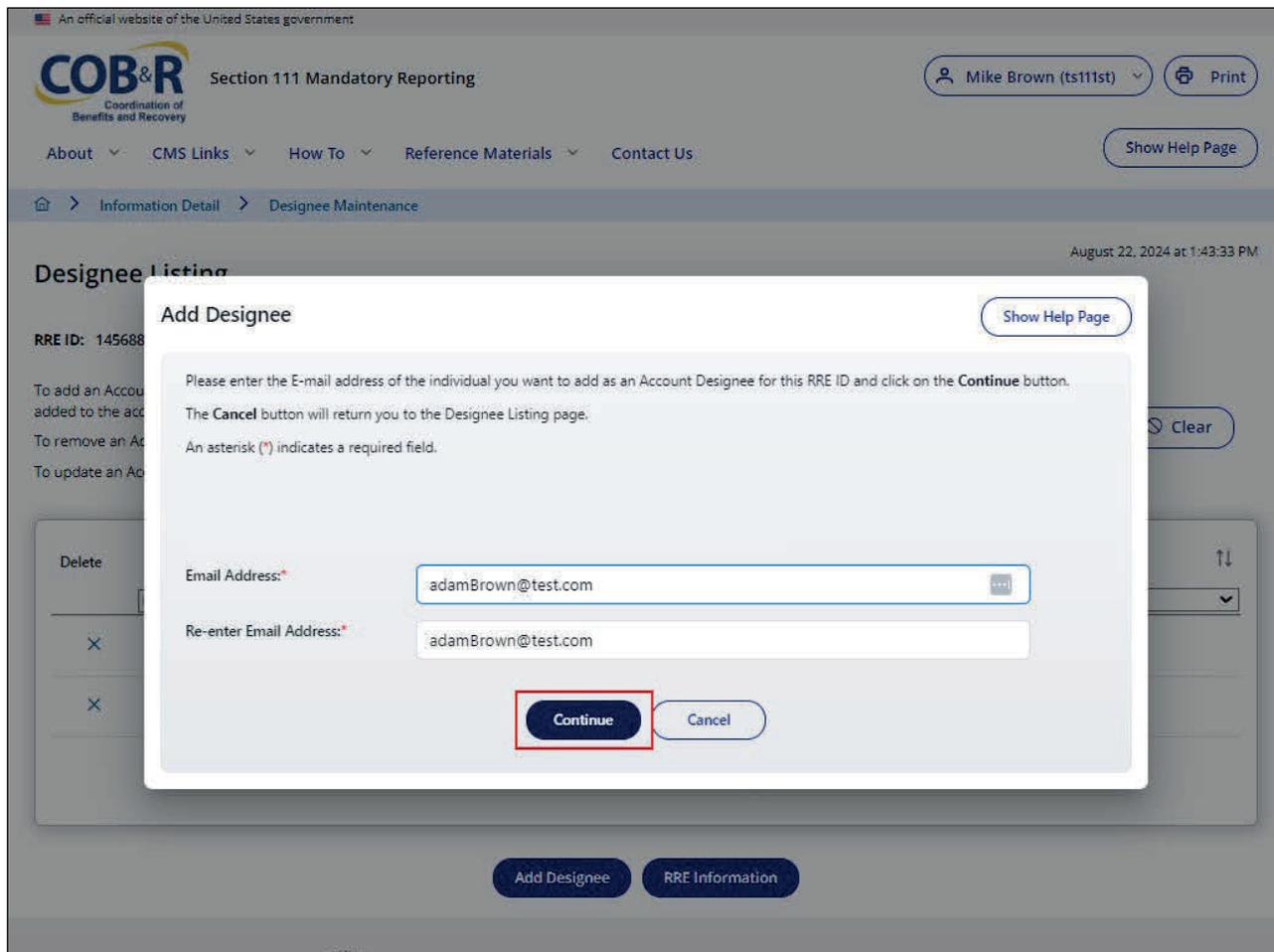
The Designee Listing page for the selected RRE ID will appear.

This page lists all Account Designees associated with the RRE ID as well as the status of each account (Pending, Active, Locked, Expired, or Revoked).

To return to the RRE Information Detail page without making any changes, click the RRE Information button.

To add an Account Designee, click the Add a Designee button under the Account Designee List.

Slide 14 of 40 - Add Designee



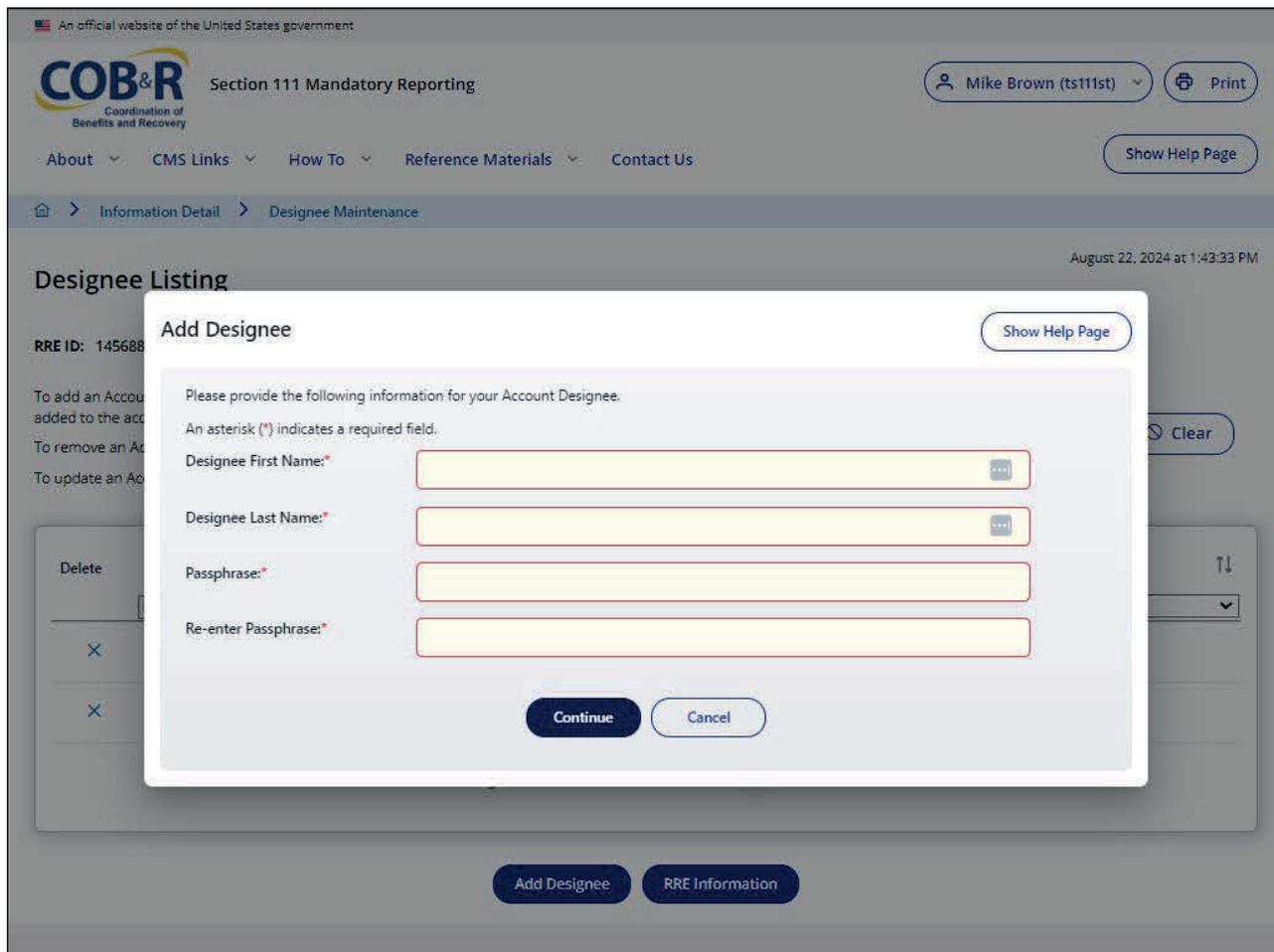
Slide notes

The Add Designee pop up box will appear.

Enter and re-enter the email address of the Account Designee you wish to invite and click Continue.

The system then verifies that the entered email address is not in the database for an existing user.

Slide 15 of 40 - Add Designee



Slide notes

If the entered email address has not been found in the database, the Add Designee pop-up will appear. Enter the Account Designee’s First Name, Last Name, Pass Phrase, re-enter the Pass Phrase, and click Continue.

Slide 16 of 40 - Designee Listing Page

An official website of the United States government

COB&R Section 111 Mandatory Reporting
Coordination of Benefits and Recovery

Mike Brown (ts111st) Print

About CMS Links How To Reference Materials Contact Us Show Help Page

Information Detail Designee Maintenance

August 22, 2024 at 1:43:33 PM

Designee Listing

RRE ID: 145688 **RRE Name:** University of Towson Health Systems

To add an Account Designee for this RRE ID, click on the Add a Designee button. Designees will receive an E-mail notifying them that they have been added to the account and how to obtain a Login ID.

To remove an Account Designee for this RRE ID, click on the Delete icon to the left of the Designee's Last Name.

To update an Account Designee's information or regenerate the invitation E-mail, click on the link formed by the Designee's Last Name.

Clear

Delete	Last Name	First Name	E-mail Address	Passphrase	Account Status	Last Login Date
<input type="checkbox"/>	Last	First	123@abc.com	passPhrase	PENDING	
<input type="checkbox"/>	Richards	Adam	321@abc.com	Welcome	ACTIVE	01/01/2024

Showing 1 to 2 of 2 entries

Add Designee RRE Information

Slide notes

This re-displays the Designee Listing page.

The newly added Account Designee will be listed with a Pending status.

The invitation email will then be sent to the Account Designee.

Slide 17 of 40 - Adding an Existing User as Account Designee

Adding an Existing User as Account Designee

- Account Designee cannot be:
 - Registered as an Authorized Representative for any RRE ID
 - Account Manager for the same RRE ID
- Account Designee for multiple RRE IDs

Slide notes

An existing, registered user can be an Account Designee for an RRE ID as long as he/she is not already registered as an Authorized Representative for any RRE ID or the Account Manager for the same RRE ID.

These individuals assist the Account Manager with the reporting process.

If the email address is found in the system, the Account Manager must add the existing user as an Account Designee for a different RRE ID.

Slide 18 of 40 - Designee Maintenance Action Link

The screenshot displays a web interface with several sections:

- Profile Report Information:**

Reporter ID:	10000	Recertification Due Date:	10/08/2022
Profile Report Date:	03/01/2024	Last Recertification Submission Date:	01/21/2024
Profile Changed Date:	03/01/2024		
- EDI Representative:**

Name: TODD BANNAR
Email: DL-HIT-MSPSC-SPRING_BATCH_SUPPORT@RANDOM.COM
Phone: (410) 842-1404
- RRE Company Information:**

Reporter Type:	GHP	Address:	02611 Testing Dr Towson, MD 12312 - 12312	Phone:	(111) 111-1112
Name:	Dynamics Inc	Fax:	(410) 555-1632		
TIN:	36978542	Lines of Business:	Hospital, Medical, Prescription Drug	HRA Records Only:	No
NAIC:	1111111	Unsolicited Alerts:	No		
- Authorized Representative Information:** (Section header visible)
- Actions:** A list of links with a red box and arrow pointing to "Designee Maintenance":
 - > File Processing Results
 - > Test File Results
 - > Upload File
 - > Designee Maintenance
 - > View Account Activity
 - > New Claim
 - > Claim Listing
 - > Register for DDE
 - > Beneficiary Lookup
 - > TIN Record Maintenance
 - > Remove RRE

Slide notes

From the RRE Information Detail page, again select Designee Maintenance link from the Actions section.

Slide 19 of 40 - Designee Listing Page

An official website of the United States government

COB&R Section 111 Mandatory Reporting
Coordination of Benefits and Recovery

Mike Brown (ts111st) Print

About CMS Links How To Reference Materials Contact Us Show Help Page

Information Detail Designee Maintenance

August 22, 2024 at 1:43:33 PM

Designee Listing

RRE ID: 145688 **RRE Name:** University of Towson Health Systems

To add an Account Designee for this RRE ID, click on the Add a Designee button. Designees will receive an E-mail notifying them that they have been added to the account and how to obtain a Login ID.

To remove an Account Designee for this RRE ID, click on the Delete icon to the left of the Designee's Last Name.

To update an Account Designee's information or regenerate the invitation E-mail, click on the link formed by the Designee's Last Name.

Clear

Delete	Last Name	First Name	E-mail Address	Passphrase	Account Status	Last Login Date
<input type="checkbox"/>	Last	First	123@abc.com	passPhrase	PENDING	
<input type="checkbox"/>	Richards	Adam	321@abc.com	Welcome	ACTIVE	01/01/2024

Showing 1 to 2 of 2 entries

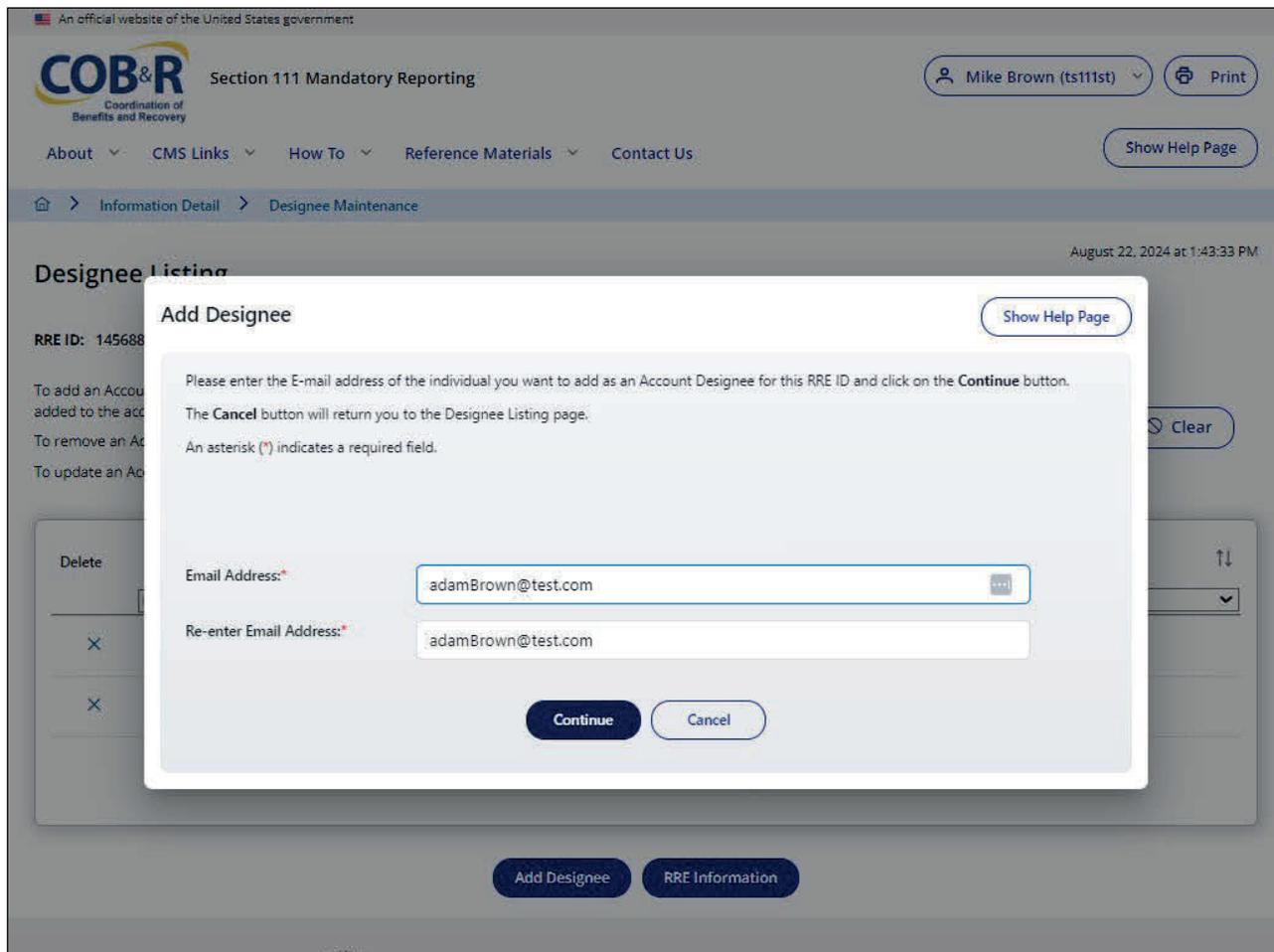
Add Designee RRE Information

Slide notes

The Designee Listing page will appear.

Click the Add Designee button.

Slide 20 of 40 - Add Designee

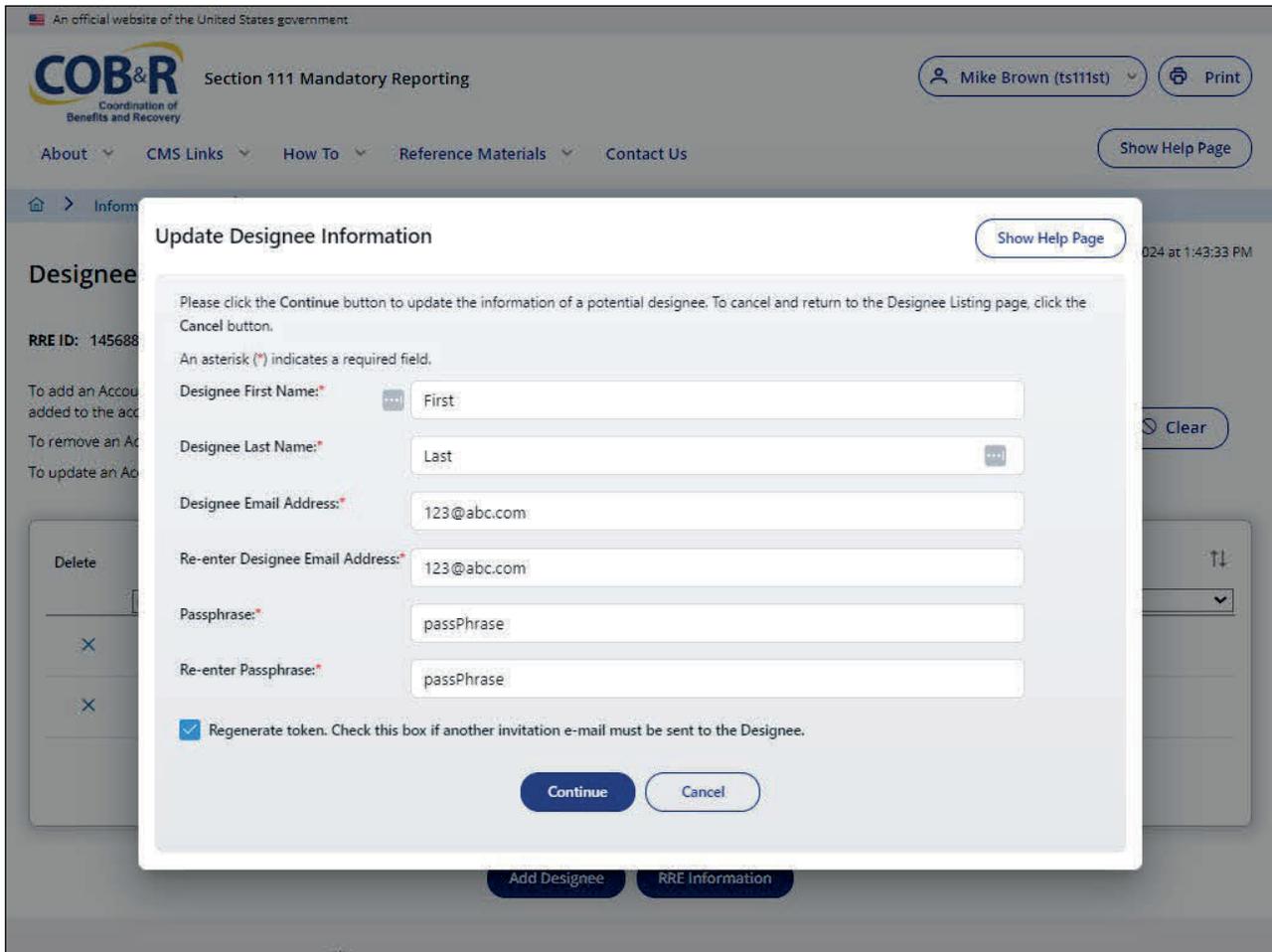


Slide notes

The Add Designee pop-up will appear.

Enter and re-enter the email address of the Account Designee you wish to invite and click Continue.

Slide 21 of 40 - Update Designee Information



Slide notes

Once the system determines that the email address is associated with an existing, eligible user, the Update Designee Information pop up will appear. After selecting Continue, the system will generate an invitation email to the Account Designee, notifying them that they have been added as an Account Designee for this RRE ID.

Slide 22 of 40 - Deleting an Account Designee

Deleting an Account Designee

- Account Manager may delete an Account Designee
- Removes him/her from specific RRE ID account
 - No longer has access to specific RRE ID
 - Retains access to other associated RRE ID accounts

**Slide notes**

An Account Manager may delete an Account Designee from an RRE ID's account on the Section 111 COBSW.

Deleting an Account Designee from a specific RRE ID account will remove them from the account of that RRE ID only.

Although the Account Designee will no longer have access to that specific account, they will retain access to any other RRE ID accounts to which they are currently associated.

Slide 23 of 40 - Designee Maintenance Action Link

The screenshot displays a web interface for RRE Information. It is divided into several sections:

- Profile Report Information:** Reporter ID: 10000, Recertification Due Date: 10/08/2022, Profile Report Date: 03/01/2024, Last Recertification Submission Date: 01/21/2024, Profile Changed Date: 03/01/2024.
- EDI Representative:** Name: TODD BANNAR, Email: DL-HIT-MSPSC-SPRING_BATCH_SUPPORT@RANDOM.COM, Phone: (410) 842-1404.
- RRE Company Information:** Reporter Type: GHP, Name: Dynamics Inc, TIN: 36978542, NAIC: 1111111, Address: 02611 Testing Dr, Towson, MD 12312 - 12312, Phone: (111) 111-1112, Fax: (410) 555-1632, Lines of Business: Hospital, Medical, Prescription Drug, HRA Records Only: No, Unsolicited Alerts: No.
- Authorized Representative Information:** (Section header visible).
- Actions:** A list of links including File Processing Results, Test File Results, Upload File, Designee Maintenance (highlighted with a red arrow), View Account Activity, New Claim, Claim Listing, Register for DDE, Beneficiary Lookup, TIN Record Maintenance, and Remove RRE.

Slide notes

From the RRE Information Detail page, scroll back to the Actions section and select the Designee Maintenance link.

Slide 24 of 40 - Designee Listing Page - Delete Action

An official website of the United States government

COB&R Section 111 Mandatory Reporting
Coordination of Benefits and Recovery

Mike Brown (ts111st) Print

About CMS Links How To Reference Materials Contact Us Show Help Page

Information Detail Designee Maintenance

August 22, 2024 at 1:43:33 PM

Designee Listing

RRE ID: 145688 **RRE Name:** University of Towson Health Systems

To add an Account Designee for this RRE ID, click on the Add a Designee button. Designees will receive an E-mail notifying them that they have been added to the account and how to obtain a Login ID.

To remove an Account Designee for this RRE ID, click on the Delete icon to the left of the Designee's Last Name.

To update an Account Designee's information or regenerate the invitation E-mail, click on the link formed by the Designee's Last Name.

Clear

Delete	Last Name	First Name	E-mail Address	Passphrase	Account Status	Last Login Date
<input type="text" value="Last Name Filter"/>						
<input type="checkbox"/>	Last	First	123@abc.com	passPhrase	PENDING	
<input type="checkbox"/>	Richards	Adam	321@abc.com	Welcome	ACTIVE	01/01/2024

Showing 1 to 2 of 2 entries

Add Designee RRE Information

Slide notes

The Designee Listing page will appear.

Click the Delete icon (X) next to the Account Designee you wish to delete from the RRE's account.

Slide 25 of 40 – Delete Designee

The screenshot shows the COB&R (Coordination of Benefits and Recovery) website interface. At the top, it says "An official website of the United States government" and "Section 111 Mandatory Reporting". The user is logged in as "Mike Brown (ts111st)". The page title is "Designee Listing" and the date is "August 22, 2024 at 1:43:33 PM". A "Delete Designee" pop-up dialog box is centered on the screen, displaying the following text:

Delete Designee

Please click on the **Continue** button to confirm your delete request for this Account Designee. This will remove the individual from your account for this RRE ID only. The Designee will no longer have access to this RRE ID but will retain access to any other RRE ID accounts to which he/she is currently associated.

Click on the **Cancel** button to return to the Designee Listing page without deleting this Account Designee.

First Name: Adam
Last Name: Richards
Email: 321@abc.com

Buttons: Cancel, Confirm

Background page details: "RRE ID: 145688", "To add an Account Designee", "To remove an Account Designee", "To update an Account Designee", "Showing 1 to 2 of 2 entries", "Add Designee", "RRE Information".

Slide notes

The Delete Designee pop up box will appear.

If you do NOT want to delete the selected Account Designee, click Cancel to be returned to the Designee Listing page, which will show the Account Designee still listed.

If you DO want to delete the selected Account Designee, click Confirm.

Slide 26 of 40 - Designee Listing Page

An official website of the United States government

COB&R Section 111 Mandatory Reporting
Coordination of Benefits and Recovery

Mike Brown (ts111st) Print

About CMS Links How To Reference Materials Contact Us Show Help Page

Information Detail Designee Maintenance

August 22, 2024 at 1:43:33 PM

Designee Listing

RRE ID: 145688 **RRE Name:** University of Towson Health Systems

To add an Account Designee for this RRE ID, click on the Add a Designee button. Designees will receive an E-mail notifying them that they have been added to the account and how to obtain a Login ID.

To remove an Account Designee for this RRE ID, click on the Delete icon to the left of the Designee's Last Name.

To update an Account Designee's information or regenerate the invitation E-mail, click on the link formed by the Designee's Last Name.

Clear

Delete	Last Name	First Name	E-mail Address	Passphrase	Account Status	Last Login Date
<input type="text" value="Last Name Filter"/>						
<input type="checkbox"/>	Last	First	123@abc.com	passPhrase	PENDING	
<input type="checkbox"/>	Richards	Adam	321@abc.com	Welcome	ACTIVE	01/01/2024

Showing 1 to 2 of 2 entries

Add Designee RRE Information

Slide notes

The system disassociates the Account Designee from the RRE and re-displays the Designee Listing page.

Slide 27 of 40 - Edit Account Designee Information Page

Edit Account Designee Information

- Account Manager can edit information for pending Account Designees
 - Can only view personal information on Account Designees

Slide notes

An Account Manager can edit information for Account Designees in Pending status, i.e., those Account Designees who have not yet registered.

Account Managers can only view personal information on active Account Designees, e.g., name, email address, and Pass Phrase.

Slide 28 of 40 - Designee Maintenance Action Link

The screenshot displays a web interface for RRE (Registered Representative) information. It is divided into several sections:

- Profile Report Information:** Reporter ID: 10000, Recertification Due Date: 10/08/2022, Profile Report Date: 03/01/2024, Last Recertification Submission Date: 01/21/2024, Profile Changed Date: 03/01/2024.
- EDI Representative:** Name: TODD BANNAR, Email: DL-HIT-MSPSC-SPRING_BATCH_SUPPORT@RANDOM.COM, Phone: (410) 842-1404.
- RRE Company Information:** Reporter Type: GHP, Name: Dynamics Inc, TIN: 36978542, NAIC: 1111111, Address: 02611 Testing Dr, Towson, MD 12312 - 12312, Phone: (111) 111-1112, Fax: (410) 555-1632, Lines of Business: Hospital, Medical, Prescription Drug, HRA Records Only: No, Unsolicited Alerts: No.
- Authorized Representative Information:** (Section header visible).
- Actions:** A list of links including File Processing Results, Test File Results, Upload File, Designee Maintenance (highlighted with a red arrow), View Account Activity, New Claim, Claim Listing, Register for DDE, Beneficiary Lookup, TIN Record Maintenance, and Remove RRE.

Slide notes

From the RRE Detail Information page, select Designee Maintenance link from the Actions section.

Slide 29 of 40 - Designee Listing Page - Updating AD Information

An official website of the United States government

COB&R Section 111 Mandatory Reporting
Coordination of Benefits and Recovery

Mike Brown (ts111st) Print Show Help Page

About CMS Links How To Reference Materials Contact Us

Information Detail Designee Maintenance

August 22, 2024 at 1:43:33 PM

Designee Listing

RRE ID: 145688 RRE Name: University of Towson Health Systems

To add an Account Designee for this RRE ID, click on the Add a Designee button. Designees will receive an E-mail notifying them that they have been added to the account and how to obtain a Login ID.

To remove an Account Designee for this RRE ID, click on the Delete icon to the left of the Designee's Last Name.

To update an Account Designee's information or regenerate the invitation E-mail, click on the link formed by the Designee's Last Name.

Clear

Delete	Last Name	First Name	E-mail Address	Passphrase	Account Status	Last Login Date
<input type="checkbox"/>	Last	First	123@abc.com	passPhrase	PENDING	
<input type="checkbox"/>	Richards	Adam	321@abc.com	Welcome	ACTIVE	01/01/2024

Showing 1 to 2 of 2 entries

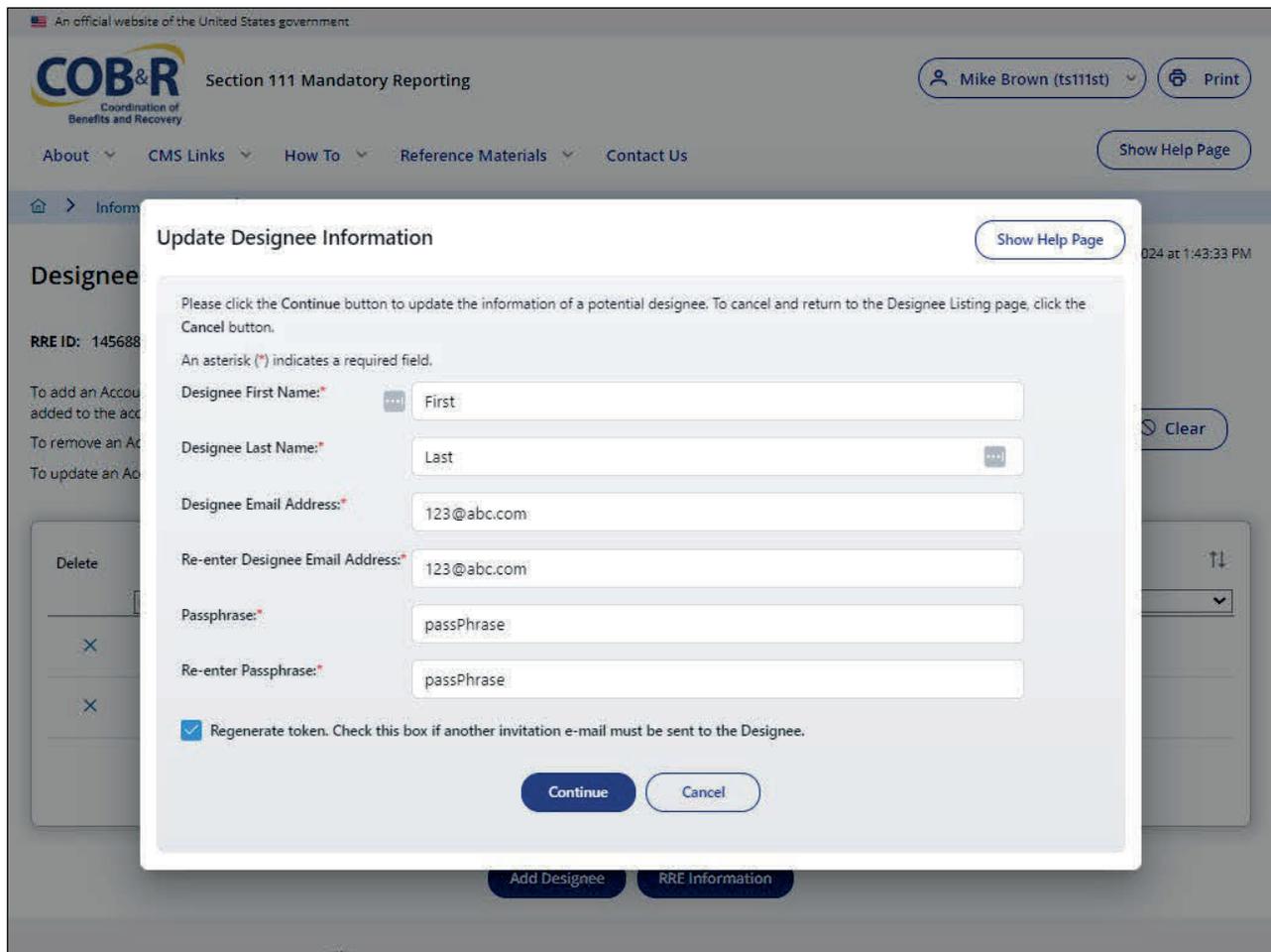
Add Designee RRE Information

Slide notes

The Designee Listing page will appear.

Click the Last Name of the Account Designee whose information must be updated.

Slide 30 of 40 - Update Designee Information



Slide notes

The Update Designee Information pop up will appear with the Account Designee’s personal information.

If no changes are necessary, click Cancel. If changes are required, make the appropriate updates and click Continue.

Slide 31 of 40 - Designee Listing Page

An official website of the United States government

COB&R Section 111 Mandatory Reporting
Coordination of Benefits and Recovery

Mike Brown (ts111st) Print Show Help Page

About CMS Links How To Reference Materials Contact Us

Information Detail Designee Maintenance

Designee Listing

August 22, 2024 at 1:43:33 PM

RRE ID: 145688 **RRE Name:** University of Towson Health Systems

To add an Account Designee for this RRE ID, click on the Add a Designee button. Designees will receive an E-mail notifying them that they have been added to the account and how to obtain a Login ID.

To remove an Account Designee for this RRE ID, click on the Delete icon to the left of the Designee's Last Name.

To update an Account Designee's information or regenerate the invitation E-mail, click on the link formed by the Designee's Last Name.

Clear

Delete	Last Name	First Name	E-mail Address	Passphrase	Account Status	Last Login Date
<input type="text" value="Last Name Filter"/>						
	Last	First	123@abc.com	passPhrase	PENDING	
	Richards	Adam	321@abc.com	Welcome	ACTIVE	01/01/2024

Showing 1 to 2 of 2 entries << < 1 > >>

Add Designee RRE Information

Slide notes

The Designee Listing page will re-appear.

Slide 32 of 40 - Regenerating the Invitation Email

Regenerating the Invitation Email

- Email is sent to invited Account Designee
 - Informs him/her of invitation
 - Includes link to register as Account Designee



Slide notes

When the Account Manager invites a person to be an Account Designee, an email is generated and sent to the intended Account Designee informing him/her of the invitation.

The email includes a token link for him/her to access the Section 111 COBSW and self-register as an Account Designee.

Slide 33 of 40 - Regenerating the Invitation Email

Regenerating the Invitation Email

- Account Manager can regenerate the email
 - Previous link will not work
 - For Account Designees in Pending status
 - Comes from cob@section111.hhs.gov
- Inform Account Designee to allow delivery of 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 allowing the intended Account Designee to self-register.

Once a new email is generated, the previously generated token link will no longer work.

Note: An invitation email can only be regenerated for Account Designees in Pending status.

This email will come from cob@section111.cms.hhs.gov.

Please inform your Account Designee to allow delivery of emails from this account.

Slide 34 of 40 - Designee Maintenance Action Link

Profile Report Information

Reporter ID:	10000	Recertification Due Date:	10/08/2022
Profile Report Date:	03/01/2024	Last Recertification Submission Date:	01/21/2024
Profile Changed Date:	03/01/2024		

RRE Company Information

Reporter Type:	GHP	Address:	02611 Testing Dr Towson, MD 12312 - 12312	Phone:	(111) 111-1112
Name:	Dynamics Inc			Fax:	(410) 555-1632
TIN:	36978542	Lines of Business:	Hospital, Medical, Prescription Drug	HRA Records Only:	No
NAIC:	1111111			Unsolicited Alerts:	No

EDI Representative

Name: TODD BANNAR
Email: DL-HIT-MSPSC-SPRING_BATCH_SUPPORT@RANDOM.COM
Phone: (410) 842-1404

Actions

- > File Processing Results
- > Test File Results
- > Upload File
- > Designee Maintenance
- > View Account Activity
- > New Claim
- > Claim Listing
- > Register for DDE
- > Beneficiary Lookup
- > TIN Record Maintenance
- > Remove RRE

Slide notes

For the desired RRE ID, select the Designee Maintenance link from the Actions section of the page.

Slide 35 of 40 - Designee Listing Page

An official website of the United States government

COB&R Section 111 Mandatory Reporting
Coordination of Benefits and Recovery

Mike Brown (ts111st) Print Show Help Page

About CMS Links How To Reference Materials Contact Us

Information Detail Designee Maintenance

August 22, 2024 at 1:43:33 PM

Designee Listing

RRE ID: 145688 RRE Name: University of Towson Health Systems

To add an Account Designee for this RRE ID, click on the Add a Designee button. Designees will receive an E-mail notifying them that they have been added to the account and how to obtain a Login ID.

To remove an Account Designee for this RRE ID, click on the Delete icon to the left of the Designee's Last Name.

To update an Account Designee's information or regenerate the invitation E-mail, click on the link formed by the Designee's Last Name.

Clear

Delete	Last Name	First Name	E-mail Address	Passphrase	Account Status	Last Login Date
<input type="checkbox"/>	Last Name Filter					
<input type="checkbox"/>	Last	First	123@abc.com	passPhrase	PENDING	
<input type="checkbox"/>	Richards	Adam	321@abc.com	Welcome	ACTIVE	01/01/2024

Showing 1 to 2 of 2 entries

Add Designee RRE Information

Slide notes

The Designee Listing page will appear.

Click the Last Name of the desired Account Designee.

Slide 36 of 40 - Update Designee Information

An official website of the United States government.

COB&R Section 111 Mandatory Reporting
Coordination of Benefits and Recovery

Mike Brown (ts111st) Print

About CMS Links How To Reference Materials Contact Us Show Help Page

Update Designee Information

Show Help Page

Please click the Continue button to update the information of a potential designee. To cancel and return to the Designee Listing page, click the Cancel button.

An asterisk (*) indicates a required field.

Designee First Name:* First

Designee Last Name:* Last

Designee Email Address:* 123@abc.com

Re-enter Designee Email Address:* 123@abc.com

Passphrase:* passPhrase

Re-enter Passphrase:* passPhrase

Regenerate token. Check this box if another invitation e-mail must be sent to the Designee.

Continue Cancel

Add Designee RRE Information

Slide notes

The Update Designee Information pop-up appears.

Click the Invitation email checkbox beneath the Account Designee's personal information and click Continue.

Slide 37 of 40 - Designee Listing Page

An official website of the United States government

COB&R Section 111 Mandatory Reporting
Coordination of Benefits and Recovery

Mike Brown (ts111st) Print

About CMS Links How To Reference Materials Contact Us Show Help Page

Information Detail Designee Maintenance

August 22, 2024 at 1:43:33 PM

Designee Listing

RRE ID: 145688 **RRE Name:** University of Towson Health Systems

To add an Account Designee for this RRE ID, click on the Add a Designee button. Designees will receive an E-mail notifying them that they have been added to the account and how to obtain a Login ID.

To remove an Account Designee for this RRE ID, click on the Delete icon to the left of the Designee's Last Name.

To update an Account Designee's information or regenerate the invitation E-mail, click on the link formed by the Designee's Last Name.

Clear

Delete	Last Name	First Name	E-mail Address	Passphrase	Account Status	Last Login Date
	<input type="text" value="Last Name Filter"/>					
X	Last	First	123@abc.com	passPhrase	PENDING	
X	Richards	Adam	321@abc.com	Welcome	ACTIVE	01/01/2024

Showing 1 to 2 of 2 entries << < 1 > >>

Add Designee RRE Information

Slide notes

The Designee Listing page will reappear.

The system will re-generate the invitation email and send it to the email address registered for the Account Designee.

Slide 38 of 40 - Course Summary

Course Summary

This course covered the following Designee Maintenance functions that the Account Manager can perform for the RRE:

- Add/Delete Account Designee
- Add Existing User as Account Designee
- Edit Account Designee Information
- Regenerate Invitation Email

**Slide notes**

This course covered the following Designee Maintenance functions that the Account Manager can perform for the RRE:

- adding/deleting an Account Designee,
- adding an existing user as an Account Designee,
- editing Account Designee information, and
- regenerating the invitation email.

Slide 39 of 40 - Conclusion

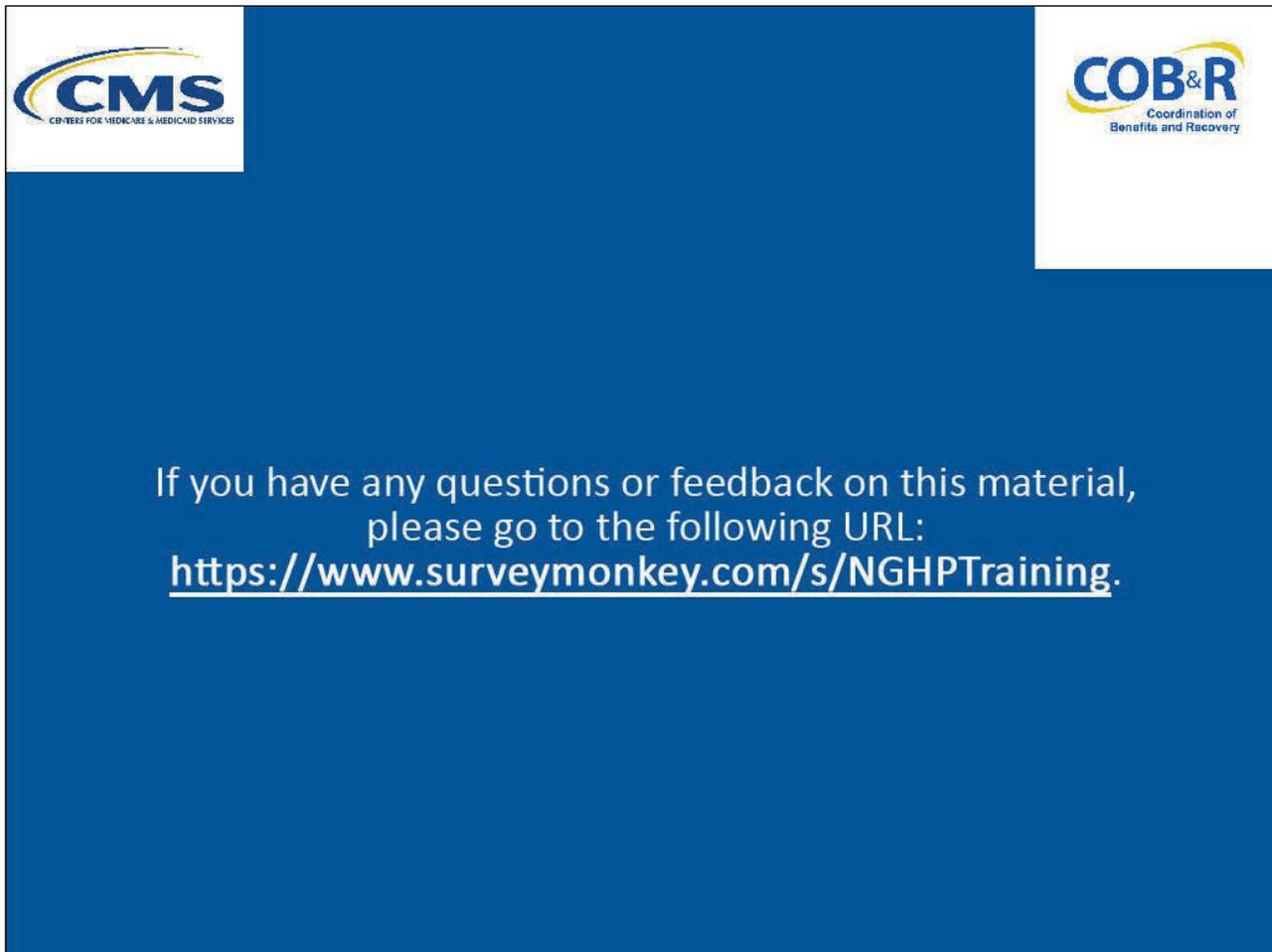


You have completed the Account Designee Maintenance Section 111 course. Detailed information on the this topic can be found in the Section 111 COBSW User Guide available for download after login at the following link:
[https://www.cms.gov/medicare/coordination-benefits-recovery/mandatory-insurer-reporting.](https://www.cms.gov/medicare/coordination-benefits-recovery/mandatory-insurer-reporting)

Slide notes

You have completed the Account Designee Maintenance Section 111 course. Detailed information on this topic can be found in the Section 111 COBSW User Guide available for download after login at the following link: [CMS NGHP Website](#).

Slide 40 of 40 - NGHP Training Survey



The slide features a blue background with two logos in the top corners. The top-left logo is for CMS (Centers for Medicare & Medicaid Services), and the top-right logo is for COB&R (Coordination of Benefits and Recovery). The main text in the center of the slide reads: "If you have any questions or feedback on this material, please go to the following URL: <https://www.surveymonkey.com/s/NGHPTraining>."

Slide notes

If you have any questions or feedback on this material, please go the following URL: [NGHP Training Survey](#).