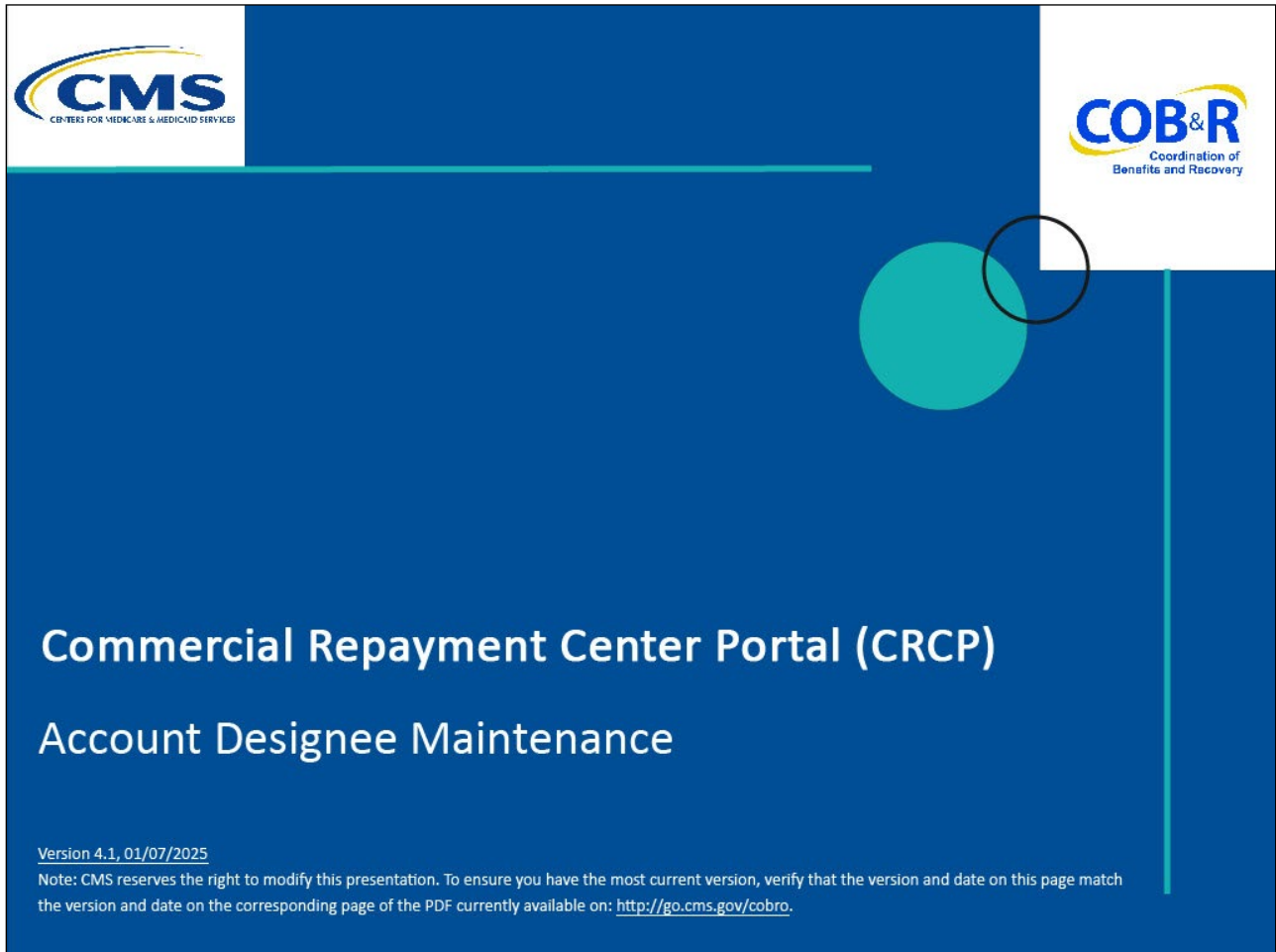


## Account Designee Maintenance

### Slide 1 - of 30 - Account Designee Maintenance



**CMS**  
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Coordination of  
Benefits and Recovery

# Commercial Repayment Center Portal (CRCP)

## Account Designee Maintenance

Version 4.1, 01/07/2025

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: <http://go.cms.gov/cobro>.

### Slide notes

Welcome to the Commercial Repayment Center Portal or CRCP Account Designee Maintenance course.



**Slide 2 - of 30 - Disclaimer**

## Disclaimer

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

All affected entities are responsible for following the instructions in the CRCP User Guide found under the *Reference Materials* menu at the following link:

<https://www.cob.cms.hhs.gov/CRCP/>.

**Slide notes**

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

All affected entities are responsible for following the instructions in the CRCP User Guide found under the Reference Materials menu at the following link: [CMS CRCP Website](https://www.cob.cms.hhs.gov/CRCP/).



**Slide 3 - of 30 - Course Overview**

## Course Overview

### How an Account Manager oversees Account Designees

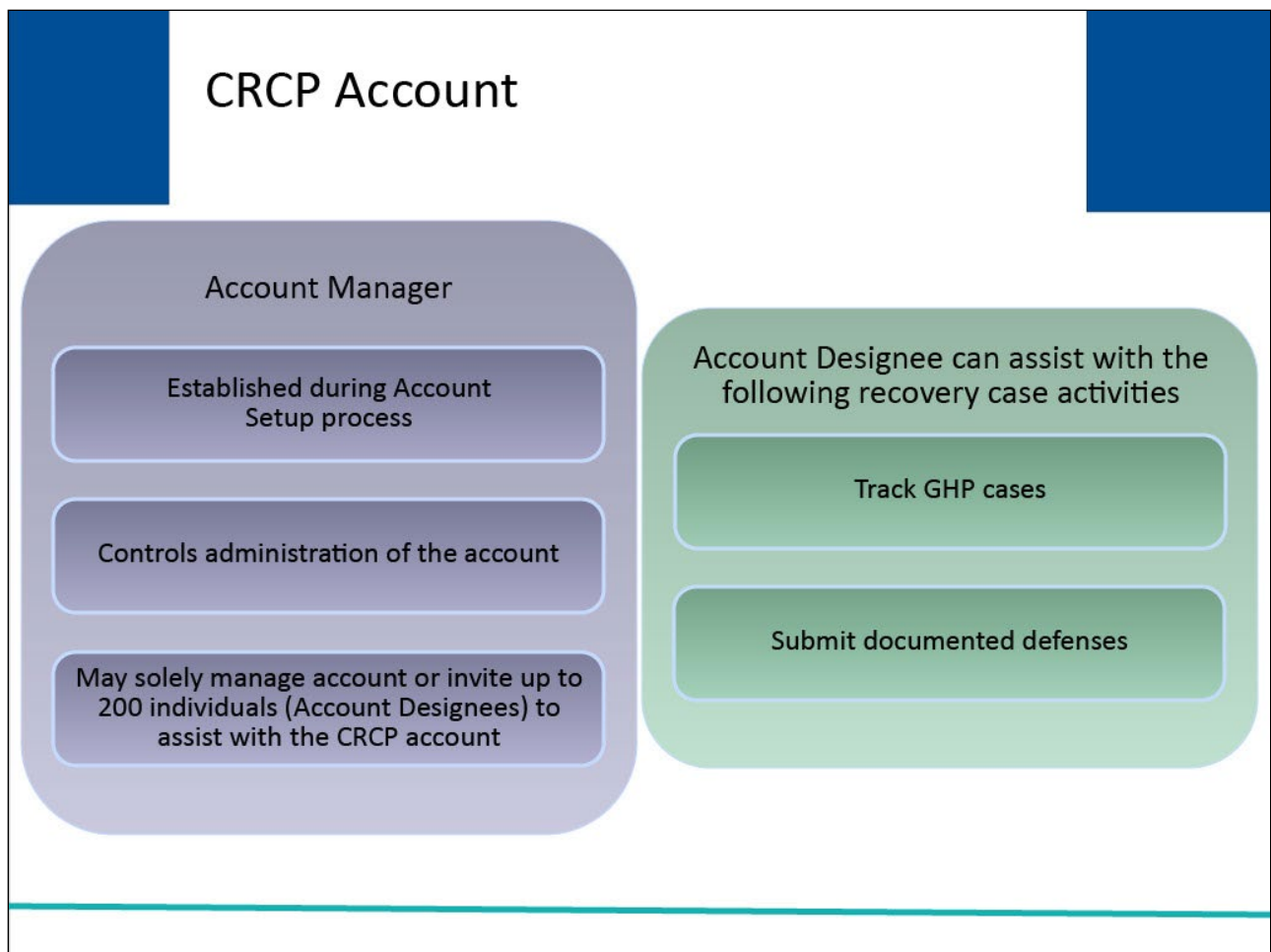
- Invite/add an Account Designees
- Update Account Designee information
  - Re-generate invitation e-mail
- Delete an Account Designee from a CRCP account

**Slide notes**

This course explains how the Account Manager can invite or add individuals (Account Designees) to assist with a CRCP account. It describes how to update Account Designee information and how to re-generate the invitation e-mail. It also explains how to delete Account Designees from an account.




## Slide 4 - of 30 - CRCP Account

**Slide notes**

Each CRCP account must have an assigned Account Manager who is established during the Account Setup process. This person controls the administration of the organization's account and recovery case workload. The Account Manager may choose to manage the entire account by themselves or may invite up to 200 individuals (Account Designees) to assist in this process. Account Designees can assist the Account Manager with the following recovery case activities: tracking Group Health Plan or GHP cases and submitting documented defenses.



## Slide 5 - of 30 - Account Listing Page

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[Print this page](#)

### Login Warning

**UNAUTHORIZED ACCESS TO THIS COMPUTER SYSTEM IS PROHIBITED BY LAW**

This warning banner provides privacy and security notices consistent with applicable federal laws, directives, and other federal guidance for accessing this Government system, which includes (1) this computer network, (2) all computers connected to this network, and (3) all devices and storage media attached to this network or to a computer on this network.

This system is provided for Government authorized use only.

Unauthorized or improper use of this system is prohibited and may result in disciplinary action and/or civil and criminal penalties.

Personal use of social media and networking sites on this system is limited as to not interfere with official work duties and is subject to monitoring.

By using this system, you understand and consent to the following:

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.

Decline

I Accept

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

## Slide notes

Once you are registered as a CRCP user, you may login to the CRCP at the following link: [CMS CRCP Website](#). Each time a user visits the CRCP website the Login Warning page will appear.



## Slide 6 - of 30 - Account Listing Page

The screenshot displays the CRCP (Commercial Repayment Center Portal) interface. At the top, a navigation bar includes links for 'About This Site', 'CMS Links', 'How To...', 'Reference Materials', and 'Contact Us'. The main content area is divided into several sections: 'Welcome to the CRCP' with a brief description of the portal's purpose; 'CRCP Messages' (currently empty); 'Getting Started' with detailed instructions on registration and user roles (Authorized Representative and Account Manager); and a 'Step 1' section with a 'New Registration (PIN Request)' button. To the right, a 'Sign in to your account' overlay is visible, featuring input fields for 'Login ID' and 'Password', and buttons for 'Login', 'Clear', and '2-Factor Login'. The overlay also includes links for 'Forgot Login ID' and 'Forgot Password'.

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

### Welcome to the CRCP

The Commercial Repayment Center Portal (CRCP) is a secure web-based system that provides Employers/Other Plan Sponsors and Insurers/Third Party Administrators with a way to manage their Group Health Plan (GHP) recovery activities more efficiently. With the use of this portal, users may view demand information on line and submit defense documentation electronically.

For information about the availability of auxiliary aids and services, please visit:  
[Accessibility & Nondiscrimination Notice](#)

### CRCP Messages

### Getting Started

Registration is required to use this application. Your **Authorized Representative** must complete the *New Registration (PIN Request)* and your **Account Manager** must complete the *Account Setup*. These individuals cannot be the same person.

The **Authorized 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 CRCP 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 CRCP.

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

For more information on the registration process and CRCP 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 CRCP **Authorized Representative** will click the **New Registration (PIN Request)** button.

Step 1

New Registration (PIN Request)  
(Letter ID and TIN required)

Step 2

Account Setup  
(Account ID and PIN required)

Sign in to your account:

Login ID:

[Forgot Login ID](#)

Password:

[Forgot Password](#)

Login

Clear

2-Factor Login

## Slide notes

From the Welcome page, enter your login ID and password.



## Slide 7 - of 30 - Account Listing Page


[Home](#) [User Options](#) [About This Site](#) [CMS Links](#) [How To...](#) [Reference Materials](#) [Contact Us](#) [Log off](#)

### Account Listing

The Account IDs associated to your Login ID are listed on this page. Account IDs with a green leaf (🌿) have opted in to "Go Paperless". These accounts receive letter notification emails instead of mailed letters. You are responsible for viewing all correspondence on the CRCP for "Go Paperless" accounts. Select the Account ID you want to access by clicking the appropriate Account ID link. To view a list of all Tax Identification Numbers (TINs) associated to an Account ID, click the corresponding View TINs Listing link.

#### Multi-Factor Authentication

Status: **Initial Process**  
Next Step: **Getting Started**



#### Multi-Factor Authentication

CRCP users may request access to view unmasked Medicare beneficiary Protected Health Information (PHI)/Personally Identifiable Information (PII). Individuals requesting this access must complete the ID Proofing and Multi-Factor Authentication (MFA) process. The status of your request will display as a link under the Multi-Factor Authentication box. You will click this link to progress through the required steps. Once you have successfully completed this process your status will be changed to Complete.

During the ID Proofing process, you will be asked to provide current personal information to confirm your identity with Experian Credit Services (an outside entity). This information will not be stored on the CRCP. This process will not impact your credit score.

To use MFA services, you will be required to register a Factor as a method of receiving a security token/push notification to access the MSPRP application. Certain Factors will require you to download and install a specific app onto the mobile device you will use to receive your security token. After the Factor registration, you will activate the factor for your login ID on the MSPRP. You may have only one Active Factor per Factor Type.

You will be able to activate the factor after the Next Step link has changed to **Factor Required**. To begin the ID Proofing process, click the Next Step: **Getting Started** link.

Account ID	Company Name	Associated TINs
<a href="#">111111111</a> 🌿	CIGNA	<a href="#">View TINs Listing</a>
<a href="#">222222222</a>	United Health Care	<a href="#">View TINs Listing</a>

<https://www.cob.cms.hhs.gov/CRCP/>

## Slide notes

To add Account Designees, the Account Manager logs into the CRCP at the following link: [CMS CRCP Website](https://www.cob.cms.hhs.gov/CRCP/). After a successful login, the Account Listing page will appear.

This page lists the accounts associated to your Login ID. Select the Account ID link for the account you want to invite a designee.



## Slide 8 - of 30 - Account Detail Page

The screenshot shows the CMS Commercial Repayment Center Portal. The header includes the CMS logo (Centers for Medicare & Medicaid Services) and the COB&R logo (Coordination of Benefits and Recovery). A navigation bar contains links: Home, User Options, Account Settings, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Log off. The main content area is titled "Account Detail" (highlighted with a red box) and shows "You have selected Account ID: 11111111 - CIGNA". Below this, it states that information associated with this Account ID will be presented on applicable pages. A "Quick Help" link is in the top right. Under "Available Actions", there are six boxes with instructions and hyperlinks: "Demand Listing", "Case Search", "Request Letter Access", "Go Paperless", "Letter Notifications", and "Open Debt Report". At the bottom, a "Previous" button (highlighted with a red box) is provided to return to the Account Listing page. A note at the bottom explains that to remove access related to a letter, the Account Manager must contact an EDI Representative at the Benefits Coordination Recovery Center (BCRC) at (646) 458-6740.

## Slide notes

The Account Detail page displays. The Account ID selected is shown at the top of the page. If you have selected the incorrect Account ID, click Previous to return to the Account Listing page.

The Open Debt Report, Go Paperless and Letter Notification hyperlinks and associated text are only available for Account Managers.



## Slide 9 - of 30 - Account Detail Page

The screenshot shows the CMS Commercial Repayment Center Portal. The header includes the CMS logo, the portal title, and the COB&R logo. The navigation bar contains links for Home, User Options, Account Settings, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Log off. The 'Account Settings' dropdown menu is open, showing options: Update Authorized Representative (AR) Information, Designee Maintenance (highlighted), View Associated TINs, and View Account Activity. The main content area is titled 'Account Detail' and includes a 'Quick Help' link. Below the title, there is a message about the selected Account ID and instructions on how to access different Account IDs. The 'Available Actions' section contains six boxes with links for Demand Listing, Case Search, Request Letter Access, Go Paperless, Letter Notifications, and Open Debt Report. At the bottom, there is a 'Previous' button and a note about removing access related to a letter.

**Account Detail**

You have selected Account ID [redacted].

Information associated to this Account ID will be presented on applicable pages in the Commercial Repayment Center Portal. You may access these pages using the links provided on this page.

If you would like to access a different Account ID, click **Previous** or **Home**. When the Account Listing page displays, select the Account ID you would like to access.

**Available Actions**

To view demands/case information or to submit defense documentation, click this link: <a href="#">Demand Listing</a>	To search for a case associated to this Account ID, click this link: <a href="#">Case Search</a>	To request access to information related to a letter that is not yet associated to this Account ID, click this link: <a href="#">Request Letter Access</a>
To request/update paperless preferences for this account, click this link: <a href="#">Go Paperless</a>	To view/print "Go Paperless" letter notification e-mails and letters, click this link: <a href="#">Letter Notifications</a>	To view all cases that have an Accounts Receivable amount greater than zero, click this link: <a href="#">Open Debt Report</a>

To remove access related to a letter associated to this Account ID, the Account Manager for this Account must contact an EDI Representative at the Benefits Coordination Recovery Center (BCRC) and provide them with key information from the letter that should be removed. EDI Representatives can be reached at: (646) 458-6740.

[Previous](#)

## Slide notes

Select Designee Maintenance from the Account Settings drop-down menu.



## Slide 10 - of 30 - Account Designee Listing Page

Skip Navigation | Login | **101** | [Print this page](#)

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

[Home](#) [User Options](#) [Account Settings](#) [About This Site](#) [CMS Links](#) [How To...](#) [Reference Materials](#) [Contact Us](#) [Log off](#)

### Account Designee Listing Quick Help

The individuals listed on this page were invited to be Account Designees for Account ID: **111111**. As an Account Manager, you can Add, Edit, or Delete Account Designees.

To invite an individual to become an Account Designee for this Account ID, click the **Add Designee** button. Individuals who are added as Designees will receive an e-mail notifying them that they have been invited to be an Account Designee for this Account. To edit an Account Designee's personal information, click their Last Name. Note: You can only edit Account Designee's in Pending Status. To delete a Designee from this Account ID, click the [X] to the left of their name.

Click **Cancel** to transfer to the Account Detail page.

Total Number of Account Designees: 3

[Clear Filters](#)

Delete	Last Name	First Name	E-mail Address	Passphrase	Status	Last Login Date
X	Jones	Ben	benj@comapny.com		Active	04/18/2018
X	Carey	Micheal	cmicheal@domain.com	letmein	Pending	
X	Deans	Micheal	cmicheal@domain.com	letmein	Pending	

[Cancel](#) [Add Designee](#)

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

## Slide notes

The Account Designee Listing page displays. This page lists all designees that have been invited or assigned to the account.

To add an Account Designee, you must first invite them. To begin this process, click Add Designee.



## Slide 11 - of 30 - Account Designee Information Page

The screenshot shows the 'Account Designee Information' page. At the top, there is a navigation bar with the CMS logo, the title 'Commercial Repayment Center Portal', and the COB&R logo. Below the navigation bar is a menu with links: Home, User Options, Account Settings, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Log off. The main content area is titled 'Account Designee Information' and includes a 'Quick Help' link. The text explains that the user should enter the e-mail address of the individual to be invited to be an Account Designee for Account ID: 111111111 and then click 'Continue'. It also states that the Commercial Repayment Center Portal (CPRP) will determine if the intended Designee is a registered user. An existing, registered user can be an Account Designee for your Account ID as long as they are not already registered as an Authorized Representative for any Account ID, or the Account Manager for the same Account ID. A note indicates that an asterisk (\*) indicates a required field. There are two input fields: '\* Account Designee E-mail Address:' and '\* Re-enter Account Designee E-mail Address:'. Below the input fields are 'Cancel' and 'Continue' buttons. At the bottom, there is a footer with links: CMS/HHS Vulnerability Disclosure Policy | Privacy Policy | User Agreement | Adobe Acrobat.

Skip Navigation | Log out | Print this page

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

Home User Options Account Settings About This Site CMS Links How To... Reference Materials Contact Us Log off

**Account Designee Information** [Quick Help](#)

Please enter the e-mail address of the individual you would like to invite to be an Account Designee for Account ID: 111111111 and then click **Continue**. The Commercial Repayment Center Portal (CPRP) will determine if the intended Designee is a registered user. An existing, registered user can be an Account Designee for your Account ID as long as they are not already registered as an Authorized Representative for any Account ID, or the Account Manager for the same Account ID.

Click **Cancel** to return to the Account Designee Listing page without inviting an Account Designee.

An asterisk (\*) indicates a required field.

\* Account Designee E-mail Address:

\* Re-enter Account Designee E-mail Address:

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## Slide notes

The Account Designee Information page displays. Enter and re-enter the e-mail address of the individual you wish to invite and click Continue.



**Slide 12 - of 30 - Add Account Designee**

The slide features a white background with two blue rectangular accents in the top-left and top-right corners. The title 'Add Account Designee' is positioned in the upper left area. A large, light-green rounded rectangle is centered on the slide, containing two lines of text. Inside this green rectangle is a smaller, darker-green rounded rectangle containing a third line of text.

## Add Account Designee

CRCP confirms that the entered e-mail is not in the database for an existing user

Existing user can be an Account Designee for the selected Account ID if they are not an Authorized Representative for any CRCP Account ID or an Account Manager for the same Account ID

**Slide notes**

The CRCP will determine if the invited Account Designee is an existing user (i.e., is an existing user of the Section 111 Coordination of Benefits Secure Web site (COBSW), Workers' Compensation Medicare Set-Aside Portal (WCMSAP), Medicare Secondary Payer Recovery Portal (MSRP) and/or the CRCP (for another account).

An existing user can be an Account Designee for your Account ID as long as they are not an Authorized Representative for any CRCP Account ID, or the Account Manager for the same Account ID.



**Slide 13 - of 30 - Account Designee Invitation Page**

The screenshot shows the 'Account Designee Invitation' page. At the top, there are logos for CMS (Centers for Medicare & Medicaid Services), the Commercial Repayment Center Portal, and COB&R (Coordination of Benefits and Recovery). A navigation bar includes links for Home, User Options, Account Settings, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Log off. A 'Quick Help' link is also present.

The main content area is titled 'Account Designee Invitation'. It contains the following text:

Please provide the Name and Passphrase for the individual that you would like to invite to be an Account Designee for this Account ID. The Passphrase can be any sequence of words or text. It is case-sensitive and can be up to 30 characters long.

After you complete the invitation process, contact your Account Designee and provide them with the Passphrase. They will need to enter it exactly as you did when they follow the link in their invitation e-mail to register for the Commercial Repayment Center Portal (CPRP).

Click **Continue** to proceed with the invitation process. Click **Cancel** to transfer to the Account Designee Listing page without inviting this individual to become an Account Designee for this Account ID.

All fields are required.

The form contains four required fields, each with an asterisk:

- \* Designee First Name: (text input field)
- \* Designee Last Name: (text input field)
- \* Passphrase: (text input field)
- \* Re-enter Passphrase: (text input field)

At the bottom of the form are three buttons: 'Previous' (blue), 'Cancel' (white), and 'Continue' (green). The 'Continue' button is highlighted with a red box.

At the very bottom of the page, there is a footer with links: CMS/HHS Vulnerability Disclosure Policy | Privacy Policy | User Agreement | Adobe Acrobat.

**Slide notes**

When the Account Manager clicks Continue on the Account Designee Information page, the Account Designee Invitation page displays. If the entered e-mail address is found in the system (i.e., the intended Account Designee is already a user of the Section 111 COBSW, WCMSAP, MSPRP or CRCP), this page displays the Designee First and Last Name and the Designee E-mail

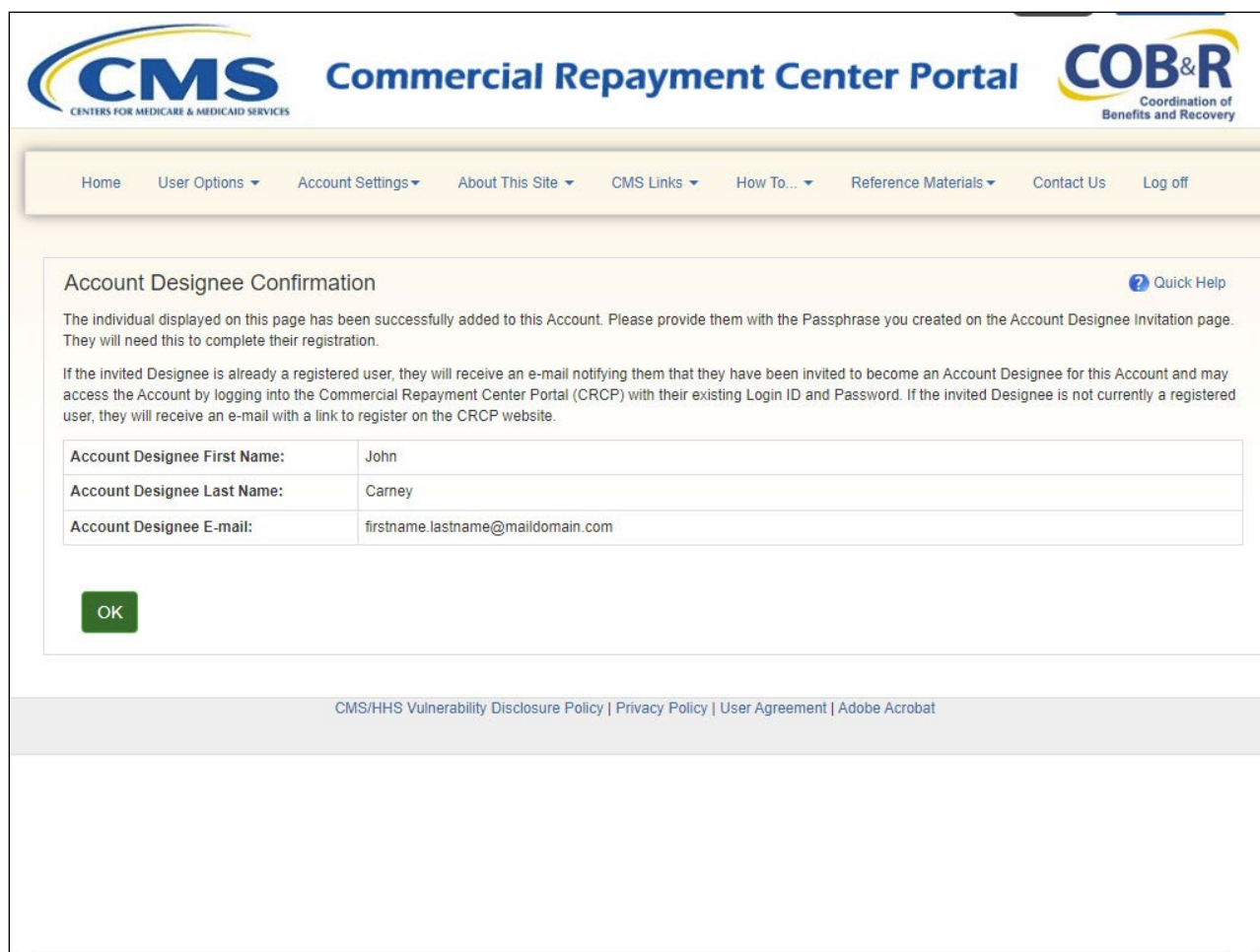
E-mail address as read-only data fields. Confirm that the information displayed is correct and click Continue to proceed.

If the e-mail address is not found in the system, you must enter the first and last name for the invited Account Designee, and create a Passphrase (a short, case-sensitive phrase, up to 30 characters). Enter and re-enter the Passphrase. Do not cut and paste this information. You must contact your Account Designee and provide them with the Passphrase.

The Account Designee will need this Passphrase to register. Click Continue to proceed.



## Slide 14 - of 30 - Account Designee Confirmation Page



The screenshot shows the 'Account Designee Confirmation' page. At the top, there are logos for CMS (Centers for Medicare & Medicaid Services), the Commercial Repayment Center Portal, and COB&R (Coordination of Benefits and Recovery). Below the logos is a navigation bar with links: Home, User Options, Account Settings, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Log off. The main content area has a title 'Account Designee Confirmation' and a 'Quick Help' link. The text explains that the individual has been successfully added to the account and provides instructions on how they can complete their registration. Below the text is a table with three rows: 'Account Designee First Name' (John), 'Account Designee Last Name' (Carney), and 'Account Designee E-mail' (firstname.lastname@maildomain.com). At the bottom of the table is a green 'OK' button. A footer bar contains links to CMS/HHS Vulnerability Disclosure Policy, Privacy Policy, User Agreement, and Adobe Acrobat.

**CMS** Commercial Repayment Center Portal **COB&R** Coordination of Benefits and Recovery

Home User Options Account Settings About This Site CMS Links How To... Reference Materials Contact Us Log off

### Account Designee Confirmation [Quick Help](#)

The individual displayed on this page has been successfully added to this Account. Please provide them with the Passphrase you created on the Account Designee Invitation page. They will need this to complete their registration.

If the invited Designee is already a registered user, they will receive an e-mail notifying them that they have been invited to become an Account Designee for this Account and may access the Account by logging into the Commercial Repayment Center Portal (CRCP) with their existing Login ID and Password. If the invited Designee is not currently a registered user, they will receive an e-mail with a link to register on the CRCP website.

Account Designee First Name:	John
Account Designee Last Name:	Carney
Account Designee E-mail:	firstname.lastname@maildomain.com

**OK**

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## Slide notes

The Account Designee Confirmation page displays. This page confirms that the Account Designee has been invited to the account. Click OK.



## Slide 15 - of 30 - Account Designee Listing Page

**CMS** Commercial Repayment Center Portal **COB&R** Coordination of Benefits and Recovery

Home User Options Account Settings About This Site CMS Links How To... Reference Materials Contact Us Log off

### Account Designee Listing

[Quick Help](#)

The individuals listed on this page were invited to be Account Designees for Account ID: 111111. As an Account Manager, you can Add, Edit, or Delete Account Designees.

To invite an individual to become an Account Designee for this Account ID, click the **Add Designee** button. Individuals who are added as Designees will receive an e-mail notifying them that they have been invited to be an Account Designee for this Account. To edit an Account Designee's personal information, click their Last Name. Note: You can only edit Account Designee's in Pending Status. To delete a Designee from this Account ID, click the [X] to the left of their name.

Click **Cancel** to transfer to the Account Detail page.

Total Number of Account Designees: 3

[Clear Filters](#)

Delete	Last Name	First Name	E-mail Address	Passphrase	Status	Last Login Date
	Jones	Ben	benj@comapny.com		Active	04/18/2018
	Carey	Micheal	cmicheal@domain.com	letmein	Pending	
	Deans	Micheal	cmicheal@domain.com	letmein	Pending	

[Cancel](#) [Add Designee](#)

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

## Slide notes

The Account Designee Listing page re-displays. If the entered e-mail address was found in the system, the Account Designee is listed with an 'Active' Status. If the e-mail address was not found in the system, the Account Designee is listed with a 'Pending' status.



## Slide 16 - of 30 - Invitation E-mail



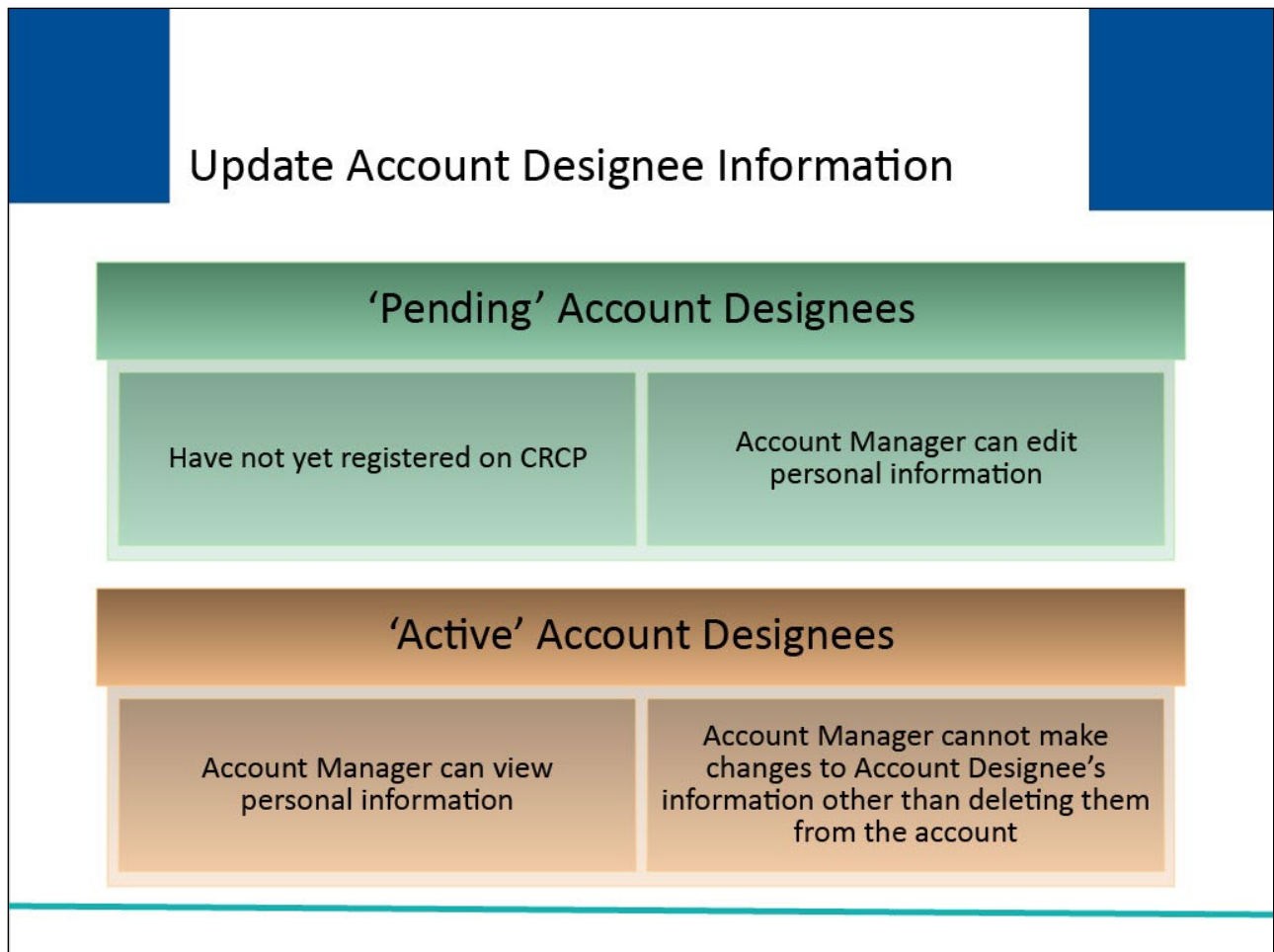
## Slide notes

Once the invitation process is complete, the Account Designee will receive an e-mail 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., is already a user of the Section 111 COBSW, WCMSAP, MSPRP or the CRCP) they will be notified that they may log into the CRCP and complete tasks related to the CRCP account. If the Account Designee is not an existing user, they will be instructed to click on the link provided in the e-mail. This link will transfer them to a CRCP registration page where they will be required to enter the Passphrase that you created.

When they have completed the registration process, the Account Designee will be able to access the CRCP account.



**Slide 17 - of 30 - Update Account Designee Information****Slide notes**



Account Designees in 'Pending' status have not yet registered on the CRCP. 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 18 - of 30 - Account Designee Listing Page

Skip Navigation | Login ID: **CH11111** | [Print this page](#)

**Commercial Repayment Center Portal**

Home | User Options | Account Settings | About This Site | CMS Links | How To... | Reference Materials | Contact Us | Log off

### Account Designee Listing

Quick Help

The individuals listed on this page were invited to be Account Designees for Account ID: **111111**. As an Account Manager, you can Add, Edit, or Delete Account Designees.

To invite an individual to become an Account Designee for this Account ID, click the **Add Designee** button. Individuals who are added as Designees will receive an e-mail notifying them that they have been invited to be an Account Designee for this Account. To edit an Account Designee's personal information, click their Last Name. Note: You can only edit Account Designee's in Pending Status. To delete a Designee from this Account ID, click the [X] to the left of their name.

Click **Cancel** to transfer to the Account Detail page.

Total Number of Account Designees: 3

Clear Filters

Delete	Last Name	First Name	E-mail Address	Passphrase	Status	Last Login Date
X	Jones	Ben	benj@comapny.com		Active	04/18/2018
X	Carey	Micheal	cmicheal@domain.com	letmein	Pending	
X	Deans	Micheal	cmicheal@domain.com	letmein	Pending	

Cancel Add Designee

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


## Slide notes


To make changes to an Account Designee's personal information in 'Pending' status, go to the Account Designee Listing page and click the last name of the individual whose information you wish to update.



## Slide 19 - of 30 - Update Account Designee Information Page

Skip Navigation | Login ID : GH111GH | [Print this page](#)

 **Commercial Repayment Center Portal**

 **COB&R**  
Coordination of  
Benefits and Recovery

Home | User Options | Account Settings | About This Site | CMS Links | How To... | Reference Materials | Contact Us | Log off

### Update Account Designee Information

The information currently associated with the selected Account Designee is displayed. The Account Manager may update any of this information and if needed, regenerate the invitation e-mail to the Account Designee.

Click **Continue** to submit your changes or click **Cancel** to transfer to the Account Designee Listing page without submitting your changes.

An asterisk (\*) indicates a required field.

* Account Designee First Name:	<input type="text" value="Sample First"/>
* Account Designee Last Name:	<input type="text" value="Sample Last"/>
* Account Designee E-mail Address:	<input type="text" value="firstname.lastname@domain.com"/>
* Re-enter Account Designee E-mail Address:	<input type="text"/>
* Passphrase:	<input type="text" value="welcome"/>
* Re-enter Passphrase:	<input type="text"/>
<input type="checkbox"/> Regenerate invitation e-mail with new token link for Account Designee	

Cancel

Continue

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## Slide notes

The Update Account Designee Information page displays. The personal information previously entered for the Account Designee is shown and is open for editing. Revise the information as needed and click Continue.



**Slide 20 - of 30 - Update Account Designee Confirmation**

The screenshot displays the CMS Commercial Repayment Center Portal. The header includes the CMS logo (Centers for Medicare & Medicaid Services) and the COB&R logo (Coordination of Benefits and Recovery). A navigation bar contains links: Home, User Options, Account Settings, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Log off.

### Account Designee Confirmation

[Quick Help](#)

The individual displayed on this page has been successfully added to this Account. Please provide them with the Passphrase you created on the Account Designee Invitation page. They will need this to complete their registration.

If the invited Designee is already a registered user, they will receive an e-mail notifying them that they have been invited to become an Account Designee for this Account and may access the Account by logging into the Commercial Repayment Center Portal (CRCP) with their existing Login ID and Password. If the invited Designee is not currently a registered user, they will receive an e-mail with a link to register on the CRCP website.

Account Designee First Name:	John
Account Designee Last Name:	Carney
Account Designee E-mail:	firstname.lastname@maildomain.com

[OK](#)

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**Slide notes**

The Account Designee's personal information is updated and the Update Account Designee Confirmation page displays.



**Slide 21 - of 30 - Regenerate Invitation E-mail**

## Regenerate Invitation E-mail

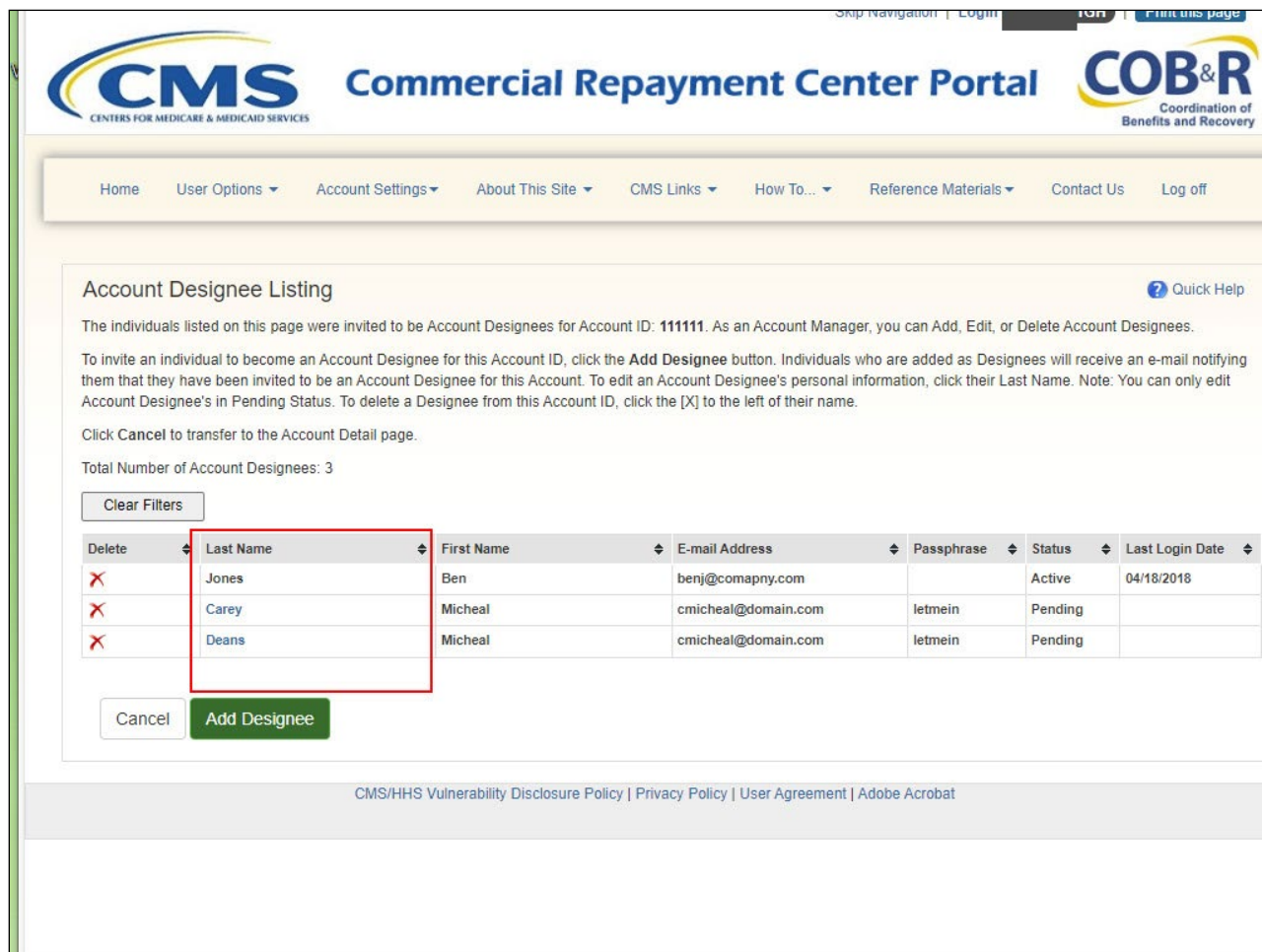
- If Account Designee misplaces/deletes e-mail
  - Account Manager can regenerate e-mail
- Previously-generated link will no longer work once new e-mail is generated
- Invitations only regenerated for Account Designees in 'Pending' status

**Slide notes**

If the Account Designee has misplaced or deleted the invitation e-mail, it can be regenerated. The token link in the previous invitation e-mail will no longer work once a new e-mail is generated. Invitation e-mails can only be regenerated for Account Designees in 'Pending' status.



## Slide 22 - of 30 - Account Designee Listing



**CMS** Commercial Repayment Center Portal **COB&R** Coordination of Benefits and Recovery

Home User Options Account Settings About This Site CMS Links How To... Reference Materials Contact Us Log off

### Account Designee Listing

[Quick Help](#)

The individuals listed on this page were invited to be Account Designees for Account ID: 111111. As an Account Manager, you can Add, Edit, or Delete Account Designees.

To invite an individual to become an Account Designee for this Account ID, click the **Add Designee** button. Individuals who are added as Designees will receive an e-mail notifying them that they have been invited to be an Account Designee for this Account. To edit an Account Designee's personal information, click their Last Name. Note: You can only edit Account Designee's in Pending Status. To delete a Designee from this Account ID, click the [X] to the left of their name.

Click **Cancel** to transfer to the Account Detail page.

Total Number of Account Designees: 3

[Clear Filters](#)

Delete	Last Name	First Name	E-mail Address	Passphrase	Status	Last Login Date
X	Jones	Ben	benj@comapny.com		Active	04/18/2018
X	Carey	Micheal	cmicheal@domain.com	letmein	Pending	
X	Deans	Micheal	cmicheal@domain.com	letmein	Pending	

[Cancel](#) [Add Designee](#)

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## Slide notes

To regenerate the invitation e-mail, go to the Account Designee Listing page and click the last name of the individual that needs the e-mail regenerated.




## Slide 23 - of 30 - Update Account Designee Information Page

Skip Navigation | Login ID : GH111GH | [Print this page](#)

 **CMS**  
CENTERS FOR MEDICARE & MEDICAID SERVICES

**Commercial Repayment Center Portal**

 **COB&R**  
Coordination of  
Benefits and Recovery

[Home](#) [User Options](#) [Account Settings](#) [About This Site](#) [CMS Links](#) [How To...](#) [Reference Materials](#) [Contact Us](#) [Log off](#)

Update Account Designee Information

[Quick Help](#)

The information currently associated with the selected Account Designee is displayed. The Account Manager may update any of this information and if needed, regenerate the invitation e-mail to the Account Designee.

Click **Continue** to submit your changes or click **Cancel** to transfer to the Account Designee Listing page without submitting your changes.

An asterisk (\*) indicates a required field.

* Account Designee First Name:	<input type="text" value="Sample First"/>
* Account Designee Last Name:	<input type="text" value="Sample Last"/>
* Account Designee E-mail Address:	<input type="text" value="firstname.lastname@domain.com"/>
* Re-enter Account Designee E-mail Address:	<input type="text"/>
* Passphrase:	<input type="text" value="welcome"/>
* Re-enter Passphrase:	<input type="text"/>
<input checked="" type="checkbox"/> Regenerate invitation e-mail with new token link for Account Designee	

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## Slide notes

The Update Account Designee Information page displays. Select the Regenerate invitation e-mail check box beneath the

Account Designee's personal information and then click Continue.



## Slide 24 - of 30 - Account Designee Listing Page

Skip Navigation | Login ID: **CRCP11111** | **CRCP11111** | **Print this page**

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

Home User Options Account Settings About This Site CMS Links How To... Reference Materials Contact Us Log off

### Account Designee Listing Quick Help

The individuals listed on this page were invited to be Account Designees for Account ID: **111111**. As an Account Manager, you can Add, Edit, or Delete Account Designees.

To invite an individual to become an Account Designee for this Account ID, click the **Add Designee** button. Individuals who are added as Designees will receive an e-mail notifying them that they have been invited to be an Account Designee for this Account. To edit an Account Designee's personal information, click their Last Name. Note: You can only edit Account Designee's in Pending Status. To delete a Designee from this Account ID, click the [X] to the left of their name.

Click **Cancel** to transfer to the Account Detail page.

Total Number of Account Designees: 3

Delete	Last Name	First Name	E-mail Address	Passphrase	Status	Last Login Date
<input checked="" type="checkbox"/>	Jones	Ben	benj@comapny.com		Active	04/18/2018
<input checked="" type="checkbox"/>	Carey	Micheal	cmicheal@domain.com	letmein	Pending	
<input checked="" type="checkbox"/>	Deans	Micheal	cmicheal@domain.com	letmein	Pending	

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## Slide notes

The Account Designee Listing page re-displays. The system re-generates the invitation e-mail and sends it to the e-mail address registered for the Account Designee.

To remove an Account Designee from the CRCP account, click the X next to the individual's name.



**Slide 25 - of 30 - Delete Account Designee Confirmation Page**

The screenshot shows the 'Delete Account Designee Confirmation' page. At the top, there is a navigation bar with links: 'Skip Navigation', 'Login ID: [redacted] GH', and 'Print this page'. Below this is the CMS logo (Centers for Medicare & Medicaid Services) and the 'Commercial Repayment Center Portal' title. To the right is the COB&R logo (Coordination of Benefits and Recovery). A secondary navigation bar contains links: 'Home', 'User Options', 'Account Settings', 'About This Site', 'CMS Links', 'How To...', 'Reference Materials', 'Contact Us', and 'Log off'. The main content area has a title 'Delete Account Designee Confirmation' and a 'Quick Help' link. The text reads: 'Please review the information displayed on this page to confirm that this individual should no longer have access to Account ID: 11111111. Click OK to proceed with the delete request. This will remove this individual's access to this Account ID only. The Account Designee will retain access to all other Account IDs to which he/she is currently associated. Click Cancel to transfer to the Account Designee Listing page without deleting this individual from this Account ID.' Below this, the designee information is listed: 'Designee First Name: John', 'Designee Last Name: Carey', and 'Designee E-mail: johnc@company.com'. At the bottom are 'Cancel' and 'OK' buttons. A footer bar contains links: 'CMS/HHS Vulnerability Disclosure Policy | Privacy Policy | User Agreement | Adobe Acrobat'.

Skip Navigation | Login ID: [redacted] GH | Print this page

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

Home User Options Account Settings About This Site CMS Links How To... Reference Materials Contact Us Log off

**Delete Account Designee Confirmation** ? Quick Help

Please review the information displayed on this page to confirm that this individual should no longer have access to Account ID: 11111111. Click OK to proceed with the delete request. This will remove this individual's access to this Account ID only. The Account Designee will retain access to all other Account IDs to which he/she is currently associated. Click Cancel to transfer to the Account Designee Listing page without deleting this individual from this Account ID.

Designee First Name: John  
Designee Last Name: Carey  
Designee E-mail: johnc@company.com

Cancel OK

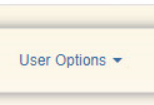
CMS/HHS Vulnerability Disclosure Policy | Privacy Policy | User Agreement | Adobe Acrobat

**Slide notes**

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



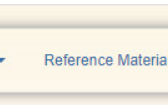
## Slide 26 - of 30- Account Designee Listing



CMS

CENTERS FOR MEDICARE & MEDICAID SERVICES

Commercial Repayment Center Portal




COB&R

Coordination of Benefits and Recovery

[Home](#)
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[How To...](#)
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[Contact Us](#)
[Log off](#)

Account Designee Listing

 Quick Help




The individuals listed on this page were invited to be Account Designees for Account ID: **111111**. As an Account Manager, you can Add, Edit, or Delete Account Designees.

To invite an individual to become an Account Designee for this Account ID, click the **Add Designee** button. Individuals who are added as Designees will receive an e-mail notifying them that they have been invited to be an Account Designee for this Account. To edit an Account Designee's personal information, click their Last Name. Note: You can only edit Account Designee's in Pending Status. To delete a Designee from this Account ID, click the [X] to the left of their name.

Click **Cancel** to transfer to the Account Detail page.

Total Number of Account Designees: 3

Clear Filters

Delete	Last Name	First Name	E-mail Address	Passphrase	Status	Last Login Date
	Jones	Ben	benj@comapny.com		Active	04/18/2018
	Carey	Micheal	cmicheal@domain.com	letmein	Pending	
	Deans	Micheal	cmicheal@domain.com	letmein	Pending	

Cancel

Add Designee

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## Slide notes

The Account Designee Listing page will appear. The Account Designee that was deleted will no longer appear on the listing and will no longer be able to access this CRCP account. Note: The Account Designee will not be deleted from any other account they are associated with.



**Slide 27 - of 30- Assistance**

## Assistance

Contact EDI Representative for assistance with Account Designee maintenance



EDI Representative phone:

(646) 458-6740

### Slide notes

If you are unable to add, update or delete an Account Designee from your account, please contact an Electronic Data Interchange or EDI Representative. EDI Representatives are available at: (646) 458-6740.



**Slide 30 - of 30 - Course Summary**

## Course Summary



### How an Account Manager oversees Account Designees

- Invite/add an Account Designees
- Update Account Designee information
  - Re-generate invitation e-mail
- Delete an Account Designee from a CRCP account

**Slide notes**

This course explained how the Account Manager can invite or add individuals (Account Designees) to assist with a CRCP account. It described how to update Account Designee information and how to re-generate the invitation e-mail. It also explained how to delete Account Designees from an account.



**Slide 29 - of 30 - Conclusion**

You have completed the Account Designee Maintenance course. Information in this course can be referenced by using the CRCP User Guide found under the *Reference Materials* menu at the following link:



<https://www.cob.cms.hhs.gov/CRCP/>.

**Slide notes**

You have completed the Account Designee Maintenance course. Information in this course can be referenced by using the CRCP User Guide found under the Reference Materials menu at the [CMS CRCP Website](https://www.cob.cms.hhs.gov/CRCP/).



**Slide 30 - of 30 - Survey**



If you have any questions or feedback on this material, please go to the following URL:  
[https://www.surveymonkey.com/r/CRCPTTraining.](https://www.surveymonkey.com/r/CRCPTTraining)

**Slide notes**

If you have any questions or feedback on this material, please go to the following URL: [CRCP Training Survey](https://www.surveymonkey.com/r/CRCPTTraining)