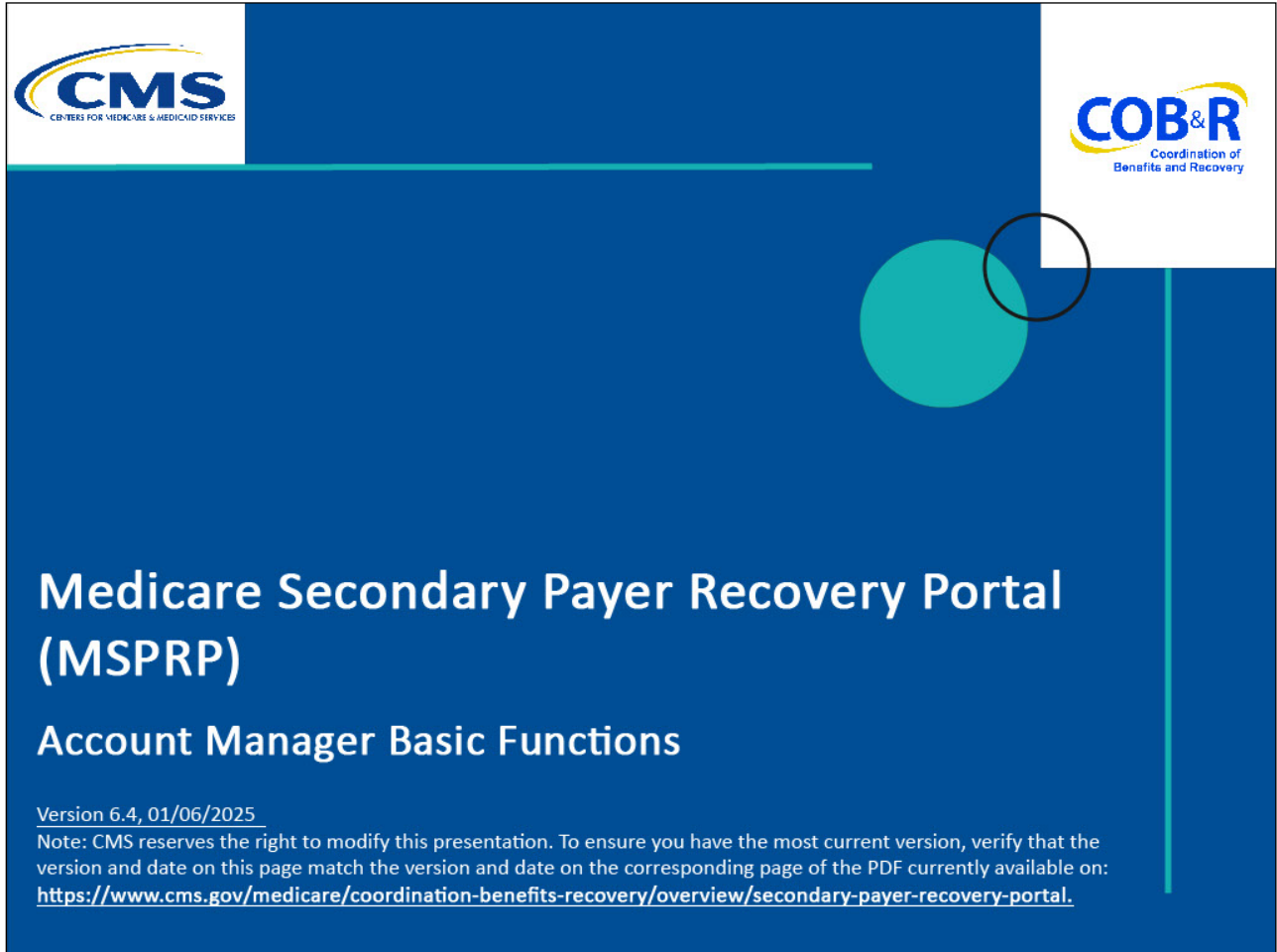


Account Manager Basic Functions Introduction

Slide 1 of 48- Account Manager Basic Functions Introduction

The slide features a dark blue background with a large teal circle on the right side. 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 "Medicare Secondary Payer Recovery Portal (MSPRP)" is in large white font, followed by the subtitle "Account Manager Basic Functions" in a slightly smaller white font. At the bottom left, there is a version number and a note about the presentation's currency, with a URL provided for the latest PDF version.

CMS
CENTERS FOR MEDICARE & MEDICAID SERVICES

COB&R
Coordination of
Benefits and Recovery

Medicare Secondary Payer Recovery Portal (MSPRP)

Account Manager Basic Functions

Version 6.4, 01/06/2025

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:
<https://www.cms.gov/medicare/coordination-benefits-recovery/overview/secondary-payer-recovery-portal>.

Slide notes

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

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

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

Slide 2 of 48- Disclaimer

Disclaimer

While all information in this document is believed to be correct at the time of writing, this Computer Based Training (CBT) is for educational purposes only and does not constitute official Centers for Medicare & Medicaid Services (CMS) instructions. All affected entities are responsible for following the instructions found in the MSPRP User Manual found at the following link:

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

Slide notes

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

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

Slide 3 of 48- Course Overview

Course Overview

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



Slide notes

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

Slide 4 of 48- Account Manager Role

Account Manager - Role

- Each MSPRP account must have Account Manager
 - Established during Account Setup
- Account Representative must contact EDI Department to change Account Manager
- Registered user of the system
 - Controls administration of account, manages overall process
 - Can only have one per MSPRP account
 - Can be associated to multiple MSPRP accounts as an Account Manager or an Account Designee
 - May choose to manage the entire account or invite individuals (Account Designees) to assist in the process

Slide notes

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

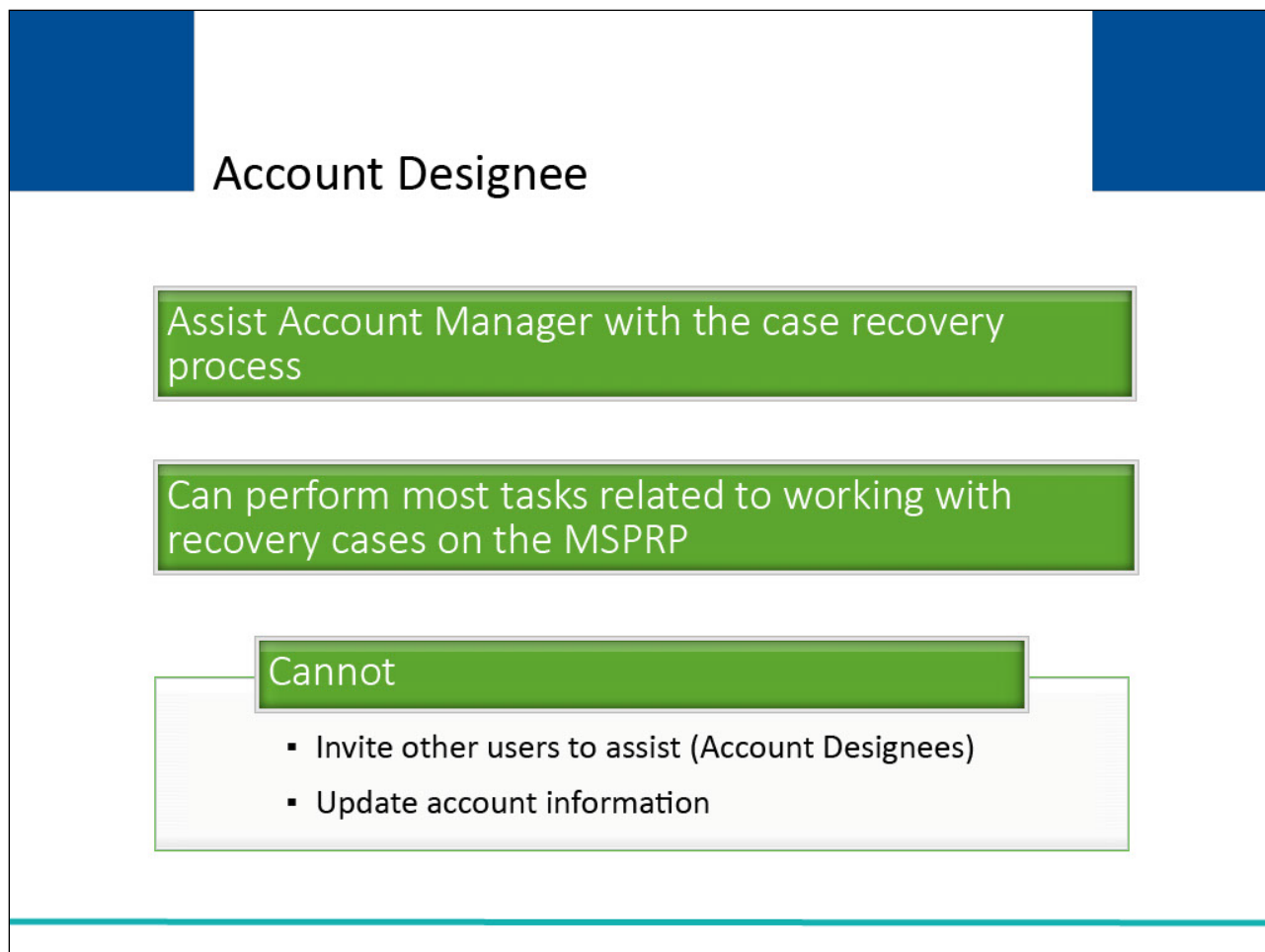
To replace an Account Manager, the Account Representative must contact the Electronic Data Interchange (EDI) Department.

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

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

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

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

Slide 5 of 48- Account Designee

Account Designee

- Assist Account Manager with the case recovery process
- Can perform most tasks related to working with recovery cases on the MSPRP
- Cannot
 - Invite other users to assist (Account Designees)
 - Update account information

Slide notes



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

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

Slide 6 of 48- Account Manager- Basic Functions

Account Manager Basic Functions

- Update account information
- Perform Account Designee maintenance
- Request case access for the account
- Manage (grant/revoke) Account Designee access
- Report A Case
- Have access to view the CRC and NGHP Open Debt Report



Slide notes

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

- update account information,
- perform account designee maintenance,
- request case access for the account,
- manage (grant/revoke) account designee access,
- report a case, and
- have access to view the CRC and NGHP Open Debt Report.


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

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

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

Please see the Requesting Authorization CBT for more information.


Slide 7 of 48- Account List Page

 [Print this page](#)

Account List

Click the desired link to access the associated account. Accounts with a green leaf (🍃) include an address that has opted to "Go Paperless" via the MMSEA Section 111 Reporting process. These accounts receive letter notification e-mails instead of mailed letters for the "Go Paperless" addresses. You are responsible for viewing all "Go Paperless" correspondence on the MSPRP. **Note:** To obtain information on the account's paperless addresses, please contact your Section 111 file submitter/reporting agent.

You may update your personal information or change your current password by clicking the appropriate link under the Account Settings List.



Multi-Factor Authentication

MSPRP users may request access to view unmasked claims data that was previously only accessible to the beneficiary. 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 the 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 MSPRP. 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.

Associated Account IDs:

- 30401 ABC Corporation 🍃
- 30324 Smith Associates

Quick Help

[Help About This Page](#)

Account Settings

[Update Personal Information](#)[Change Password](#)

Multi-Factor Authentication

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

Slide notes

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

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

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

Slide 8 of 48- Welcome! Page

Welcome!

Account: 30401 ABC Corporation

The Medicare Secondary Payer Recovery Portal provides a quick and efficient way to request case information and provide information to assist in resolving Medicare's recovery claim.

With the use of this portal, you may submit a valid authorization, request an update conditional payment amount, submit settlement information and dispute claims.

You may view the account activity by clicking the appropriate link under the Account Settings.

To request information regarding a case you have not already associated to your account, click the Request Case Access link below.

To see cases that you have previously associated to your account, click the Case Listing link below.

To submit a case, click the Report A Case link below.

To request an Open Debt Report, click the Open Debt Report link below.

To view/print "Paperless" letter notification e-mails and letters, click the Go Paperless Letter Notifications link below.

Note: You will not be able to use the links below until your Profile Report has been returned.

[Request Case Access](#)

[Case Listing](#)

[Report A Case](#)

[Open Debt Report](#)

[Go Paperless Letter Notifications](#)

[Previous](#)

Account Settings

- [Update Account Information](#)
- [Designee Maintenance](#)
- [View Account Activity](#)
- [Update Paperless E-mail Distribution](#)

Slide notes

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

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

Slide 9 of 48 - Paperless E-mail Distribution Page

The screenshot displays the Medicare Secondary Payer Recovery Portal. The header includes the CMS logo, the portal title, and a photo of a smiling couple. A green navigation bar contains links: Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Sign off. The main content area is titled "Paperless E-mail Distribution" and includes a "Print this page" icon. It contains three paragraphs of text explaining the e-mail notification process. Below the text are two input fields for "Paperless E-mail Address" and "Re-enter Paperless E-mail Address", a checked checkbox for "BCC Account Designees", and "Continue" and "Cancel" buttons. A "Quick Help" sidebar on the right contains a link to "Help About This Page". The footer contains links to CMS/HHS Vulnerability Disclosure Policy, Privacy Policy, User Agreement, and Adobe Reader.

Medicare Secondary Payer Recovery Portal

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

Paperless E-mail Distribution

MSRP accounts with "Go Paperless" addresses receive letter notification e-mails instead of hard copy letters for "Go Paperless" addresses. These e-mails are sent to the Account Manager.

The individual/distribution list entered in the optional "Paperless E-mail Address" below are copied on the letter notification e-mails. To update the "Paperless E-mail Address", enter and re-enter the e-mail address and click **Continue**.

The Account Designees are blind copied on the letter notification e-mails. To remove the Account Designees from the letter notification e-mails, uncheck the "BCC Account Designees" check box (if checked) and click **Continue**.

Click **Cancel** to return to the previous page without updating your account settings.

Paperless E-mail Address:

Re-enter Paperless E-mail Address:

☒ BCC Account Designees

Continue **Cancel**

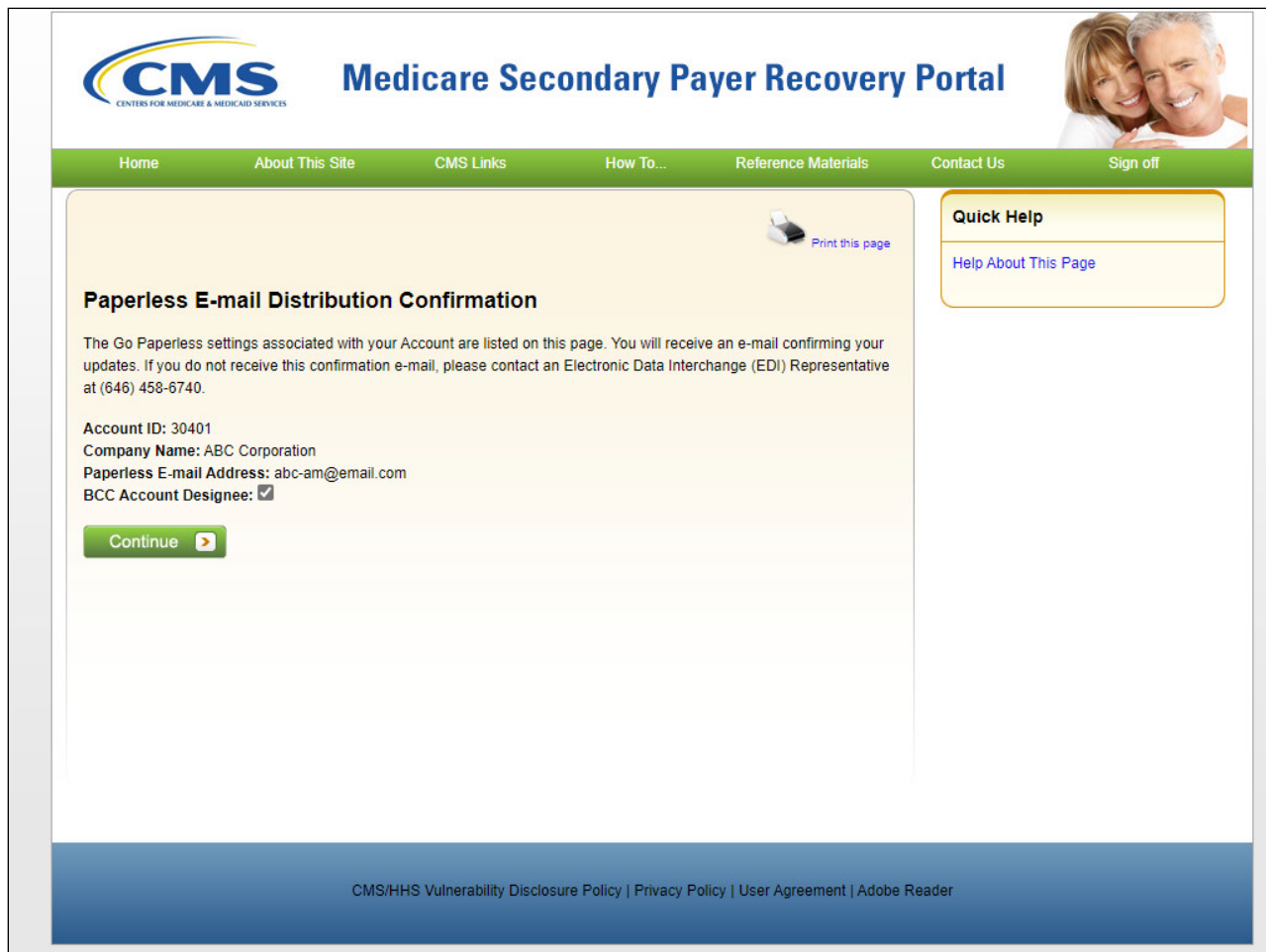
Quick Help

[Help About This Page](#)

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

Slide notes

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

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

The screenshot displays the Medicare Secondary Payer Recovery Portal. At the top left is the CMS logo (Centers for Medicare & Medicaid Services). To its right is the portal title "Medicare Secondary Payer Recovery Portal" and a photo of a smiling couple. A green navigation bar contains links: Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Sign off. The main content area has a light yellow background. It features a "Print this page" icon and link. The section is titled "Paperless E-mail Distribution Confirmation". Below the title, a paragraph states: "The Go Paperless settings associated with your Account are listed on this page. You will receive an e-mail confirming your updates. If you do not receive this confirmation e-mail, please contact an Electronic Data Interchange (EDI) Representative at (646) 458-6740." Below this, account details are listed: "Account ID: 30401", "Company Name: ABC Corporation", "Paperless E-mail Address: abc-am@email.com", and "BCC Account Designee: ☒". At the bottom of this section is a green "Continue" button with a right-pointing arrow. To the right of the main content is a "Quick Help" box with a link "Help About This Page". The footer is a blue bar with links: "CMS/HHS Vulnerability Disclosure Policy | Privacy Policy | User Agreement | Adobe Reader".

Paperless E-mail Distribution Confirmation

The Go Paperless settings associated with your Account are listed on this page. You will receive an e-mail confirming your updates. If you do not receive this confirmation e-mail, please contact an Electronic Data Interchange (EDI) Representative at (646) 458-6740.

Account ID: 30401
Company Name: ABC Corporation
Paperless E-mail Address: abc-am@email.com
BCC Account Designee: ☒

[Continue](#)

Quick Help
[Help About This Page](#)


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

Slide notes

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

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

Welcome!

Account: 30401 ABC Corporation 

The Medicare Secondary Payer Recovery Portal provides a quick and efficient way to request case information and provide information to assist in resolving Medicare's recovery claim.

With the use of this portal, you may submit a valid authorization, request an update conditional payment amount, submit settlement information and dispute claims.

You may view the account activity by clicking the appropriate link under the Account Settings.

To request information regarding a case you have not already associated to your account, click the Request Case Access link below.

To see cases that you have previously associated to your account, click the Case Listing link below.

To submit a case, click the Report A Case link below.

To request an Open Debt Report, click the Open Debt Report link below.

To view/print "Paperless" letter notification e-mails and letters, click the Go Paperless Letter Notifications link below.

Note: You will not be able to use the links below until your Profile Report has been returned.


[Request Case Access](#)

[Case Listing](#)

[Report A Case](#)

[Open Debt Report](#)

[Go Paperless Letter Notifications](#)



Slide notes


The Welcome! Page will appear.

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

















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


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

Slide 12 of 48 - Go Paperless Letter Notifications Page

Go Paperless Letter Notifications  [Print this page](#)

Letter notification e-mails issued to Account ID:1111111111 for "Go Paperless" addresses are available for the past 30 business days only. You may view letter images at any time from the Correspondence Activity Tab of the Case Information page. Click the E-mail icon to view the letter notification e-mail. Click the View Letters link to view a list of the letters added to the account for the e-mail date and to view/print each letter image. Note: You must be logged in with Multi-Factor Authentication (MFA) to view and print the letter images.

E-mail Date	E-mail	View Letters
05/28/2021		View Letters
05/27/2021		View Letters
05/26/2021		View Letters
05/25/2021		View Letters
05/24/2021		View Letters
05/23/2021		View Letters
05/22/2021		View Letters
05/21/2021		View Letters
05/20/2021		View Letters
05/19/2021		View Letters
05/18/2021		View Letters
05/17/2021		View Letters
05/16/2021		View Letters
05/15/2021		View Letters
05/14/2021		View Letters
05/13/2021		View Letters

 [Previous](#)

Quick Help
[Help About This Page](#)

Slide notes

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

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

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

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

CMS Medicare Secondary Payer Recovery Portal

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

Letters for E-mail Date [Print this page](#)

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

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

[Clear](#)

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

[Select All / Deselect All](#)

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

[Previous](#) [Continue](#)

Slide notes

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

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

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

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

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

Slide 14 of 48 - Welcome! Page

Welcome!

Account: 30401 ABC Corporation

The Medicare Secondary Payer Recovery Portal provides a quick and efficient way to request case information and provide information to assist in resolving Medicare's recovery claim.

With the use of this portal, you may submit a valid authorization, request an update conditional payment amount, submit settlement information and dispute claims.

You may view the account activity by clicking the appropriate link under the Account Settings.

To request information regarding a case you have not already associated to your account, click the Request Case Access link below.

To see cases that you have previously associated to your account, click the Case Listing link below.

To submit a case, click the Report A Case link below.

To request an Open Debt Report, click the Open Debt Report link below.

To view/print "Paperless" letter notification e-mails and letters, click the Go Paperless Letter Notifications link below.

Note: You will not be able to use the links below until your Profile Report has been returned.

[Request Case Access](#)

[Case Listing](#)

[Report A Case](#)

[Open Debt Report](#)

[Go Paperless Letter Notifications](#)

[Previous](#)


Slide notes

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

Slide 15 of 48 - Update Corporate Information Page

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

Update Corporate Information

 [Print this page](#)

You may edit the Corporate Account information, Account Representative, or Associated Companies information by clicking on the **Edit** button of that section. You may not change the account type.

Click the **Continue** button to submit changes made to the Corporate Account, Account Representative, or Associated Companies Information. Click the **Cancel** button to return to the Home Page. Any changes made to the Corporate Account, Account Representative, or Associated Companies Information sections will be lost.

Account Type: Corporate

Corporate Information **Edit**
Employer Identification Number (EIN): 999999999
Corporate Name : ABC Company

Account Representative (AR) Information **Edit**
First Name: Jane **MI:** A **Last Name:** Smith
Title: Director
E-Mail Address: jsmith@abcassociates.com
Phone: 410- 832- 8350 ext. 9877
Fax: 410- 832- 8999

Recovery Case Mailing Address:
Address Line 1: 200 Test Avenue
Address Line 2: Suite 2b
City: Towson
State: Maryland
Zip Code: 21204-2176

Associated Companies **Edit**
Note: display the following text only when at least one active record is found.

Employer Identification Number (EIN)	Company Name	EIN Validation Status
12346789	Abc Company	Verified
999999999	Example 2	Pending
111111111	Example 3	Unverified
222222222	Examp 4	Pending

[Quick Help](#)
[Help About This Page](#)

[Continue](#) [Cancel](#)

Slide notes

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

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

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

Slide 16 of 48 - Corporate Information Page

The screenshot shows the Medicare Secondary Payer Recovery Portal. At the top, there is a CMS logo and the title "Medicare Secondary Payer Recovery Portal" next to a photo of a smiling couple. A green navigation bar contains links: Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Sign off. The main content area is titled "Corporate Information" and includes a note: "An asterisk (*) indicates a required field." The form contains the following fields: "Employer Identification Number (EIN):" with the value "870916253"; "Corporation Name:" with the value "ABC Company"; "Recovery Case Mailing Address" section with "Address Line 1:" (200 Test Avenue), "Address Line 2:" (Suite 2b), "City:" (Towson), "State:" (Maryland), and "Zip Code:" (21204 - 2176). At the bottom of the form are three buttons: "Previous" (highlighted with a red box), "Continue", and "Cancel". To the right of the form is a "Quick Help" box with a link "Help About This Page". The footer contains links for "CMS/HHS Vulnerability Disclosure Policy", "Privacy Policy", "User Agreement", and "Adobe Reader".


Slide notes

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

Slide 17 of 48 - Update Corporate Information Page

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

Update Corporate Information

 [Print this page](#)

You may edit the Corporate Account information, Account Representative, or Associated Companies information by clicking on the **Edit** button of that section. You may not change the account type.

Click the **Continue** button to submit changes made to the Corporate Account, Account Representative, or Associated Companies Information. Click the **Cancel** button to return to the Home Page. Any changes made to the Corporate Account, Account Representative, or Associated Companies Information sections will be lost.

Account Type: Corporate

Corporate Information [Edit](#)
Employer Identification Number (EIN): 999999999
Corporate Name : ABC Company

Account Representative (AR) Information [Edit](#)
First Name: Jane **MI:** A **Last Name:** Smith
Title: Director
E-Mail Address: jsmith@abcassociates.com
Phone: 410- 832- 8350 ext. 9877
Fax: 410- 832- 8999

Recovery Case Mailing Address:
Address Line 1: 200 Test Avenue
Address Line 2: Suite 2b
City: Towson
State: Maryland
Zip Code: 21204-2176

Associated Companies [Edit](#)
Note: display the following text only when at least one active record is found.

Employer Identification Number (EIN)	Company Name	EIN Validation Status
12346789	Abc Company	Verified
999999999	Example 2	Pending
111111111	Example 3	Unverified
222222222	Examp 4	Pending

[Continue](#) [Cancel](#)

Quick Help
[Help About This Page](#)


Slide notes

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

Slide 18 of 48 - Update Corporate Information Confirmation Page

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

Corporate Information Update Confirmation

 [Print this page](#)

Quick Help
[Help About This Page](#)

The corporate information has been updated. Click the Continue button to return to the Home Page. Print this page for your records.

If an associated EIN has not been set to an EIN Validation Status of "Verified" within 7 business days, please contact an EDI Representative by phone at: (646) 458-6740 or e-mail at: COBVA@bcrcgdit.com.

Account Type: Corporate


Account Representative (AR) Information
First Name: Jane **MI:** A **Last Name:** Smith
Title: Director
E-Mail Address: jsmith@abcassociates.com
Phone: 410- 832- 8350 ext. 9877
Fax: 410- 832- 8999

Corporate Information
Employer Identification Number (EIN): 999999999
Corporate Name : ABC Company

Recovery Case Mailing Address
Address Line 1: 200 Test Avenue
Address Line 2: Suite 2b
City: Towson
State: Maryland
Zip Code: 21204-2176

Associated Companies

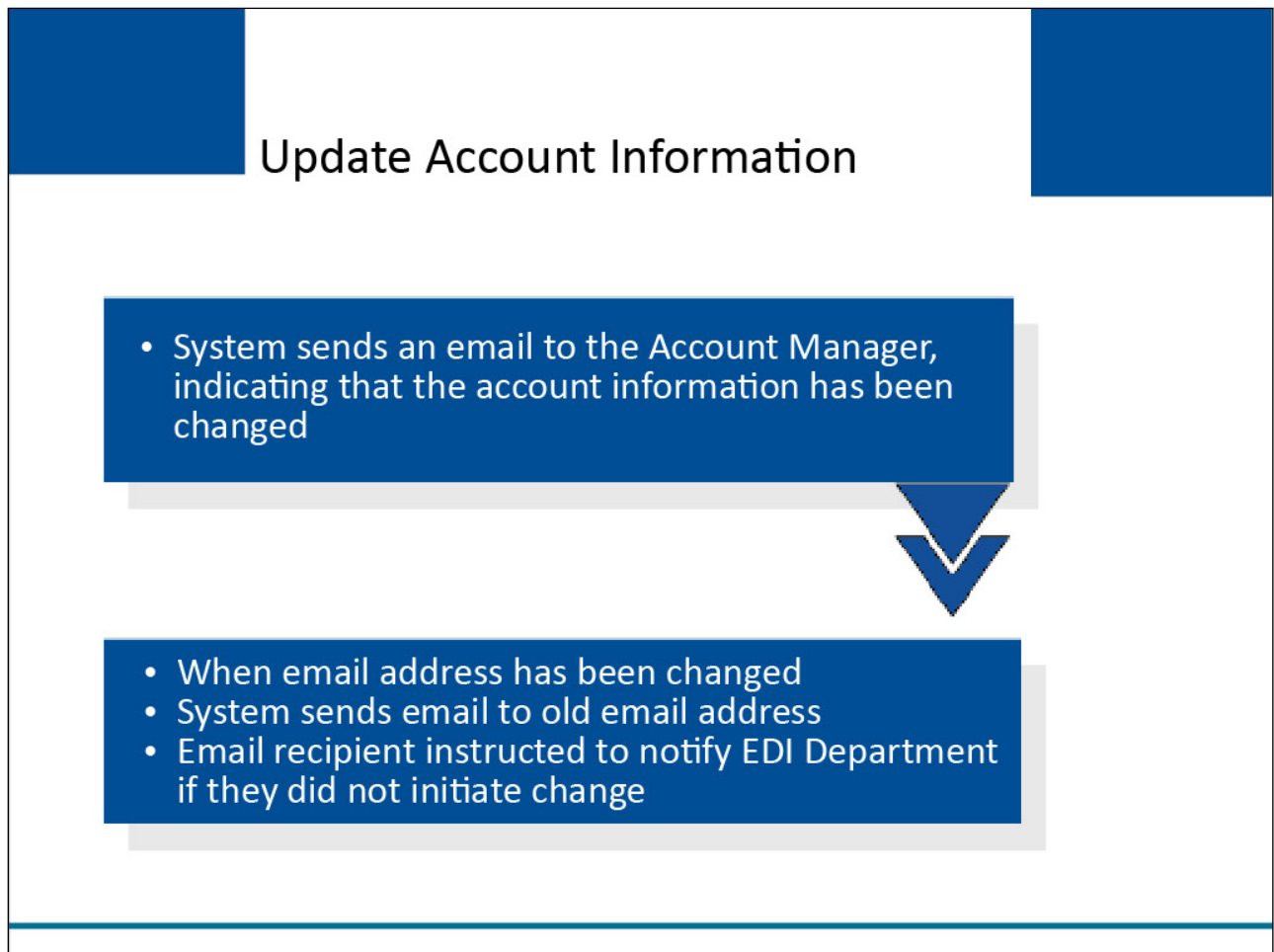
Employer Identification Number (EIN)	Company Name	EIN Validation Status
12346789	Abc Company	Verified
999999999	Example 2	Pending
111111111	Example 3	Unverified
222222222	Examp 4	Pending

[Continue](#) 

Slide notes

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

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

Slide 19 of 48 - Update Account Information**Slide notes**

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

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

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

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

Slide 20 of 48 - Account Designee Maintenance

Account Designee Maintenance

- Add Account Designees
 - Up to 200 Account Designees for corporate account
 - Up to 5 Account Designees for representative account
- Edit information for unregistered Account Designee
- Regenerate invitation email for Account Designee's registration
- Delete Account Designee

**Slide notes**

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

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

add an Account Designee

edit information for an unregistered Account Designee

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

delete an Account Designee

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

Slide 21 of 48 - Welcome! Page - Designee Maintenance

Welcome!

Account: 30401 ABC Corporation

The Medicare Secondary Payer Recovery Portal provides a quick and efficient way to request case information and provide information to assist in resolving Medicare's recovery claim.

With the use of this portal, you may submit a valid authorization, request an update conditional payment amount, submit settlement information and dispute claims.

You may view the account activity by clicking the appropriate link under the Account Settings.

To request information regarding a case you have not already associated to your account, click the Request Case Access link below.

To see cases that you have previously associated to your account, click the Case Listing link below.

To submit a case, click the Report A Case link below.

To request an Open Debt Report, click the Open Debt Report link below.

To view/print "Paperless" letter notification e-mails and letters, click the Go Paperless Letter Notifications link below.

Note: You will not be able to use the links below until your Profile Report has been returned.

[Request Case Access](#)

[Case Listing](#)

[Report A Case](#)

[Open Debt Report](#)

[Go Paperless Letter Notifications](#)

[Previous](#)

Account Settings

- [Update Account Information](#)
- [Designee Maintenance](#)
- [View Account Activity](#)
- [Update Paperless E-mail Distribution](#)

Slide notes

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

Slide 22 of 48 - Designee Listing Page


Designee Listing

This page provides the Designee(s) information for the individuals you have assigned to the account.

An Account Manager can only make changes to a pending Designee. Once the Designee has registered and has a Login ID, the Account Manager cannot make changes to the Designee information other than deleting the Designee from the account.

To make changes to the account of a particular Designee listed, select the link on the individual's last name. To delete a Designee select the Delete function to the left of the individual's name. Use the **Add Designee** function to include an individual as a designee. Individuals added as designees will receive an e-mail notifying them that they have been invited to be a designee for the account.

Selecting **Cancel** will return you to the Home Page.

Total Number of Account Designees: 6

[Clear Filters](#)

Delete	Last Name	First Name	Email Address	Passphrase	Status	Last Login Date
	Smith	Jane	jane-s@company.com		Active	05/05/2019
	Xiang	John	john-i@company.com	let me in	Pending	
	Jones	John	john-i@company.com	let me in	Pending	

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

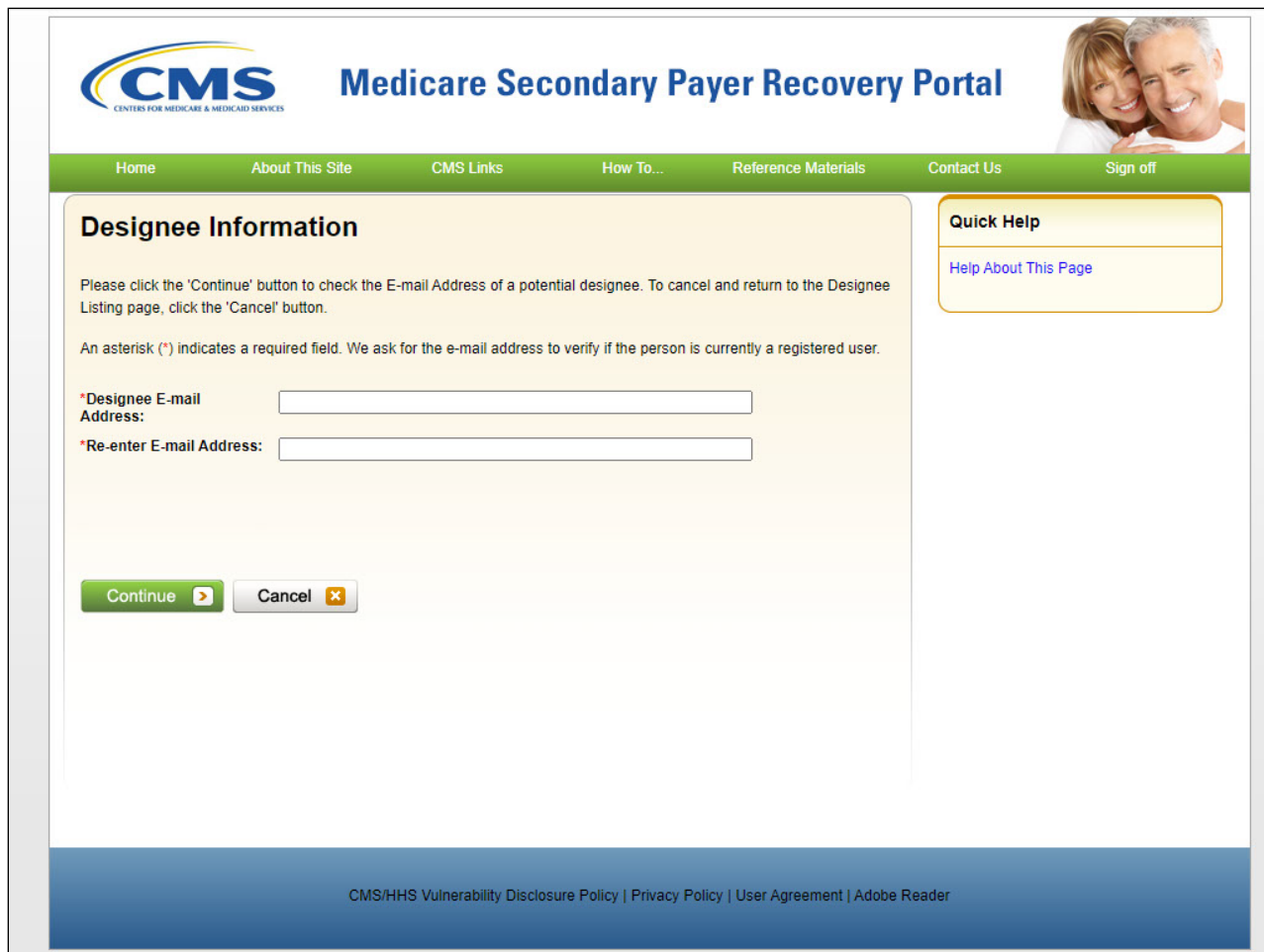
CMS/HHS Vulnerability Disclosure Policy | Privacy Policy | User Agreement | Adobe Reader

Slide notes

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

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

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

Slide 23 of 48 - Designee Information Page

The screenshot shows the Medicare Secondary Payer Recovery Portal. The header includes the CMS logo (Centers for Medicare & Medicaid Services) and the title "Medicare Secondary Payer Recovery Portal" next to a photo of a smiling couple. A green navigation bar contains links: Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Sign off.

The main content area is titled "Designee Information". It contains the following text:

Please click the 'Continue' button to check the E-mail Address of a potential designee. To cancel and return to the Designee Listing page, click the 'Cancel' button.

An asterisk (*) indicates a required field. We ask for the e-mail address to verify if the person is currently a registered user.

There are two input fields:

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

At the bottom of the form are two buttons: "Continue" (green with a right arrow) and "Cancel" (gray with a red X).

On the right side, there is a "Quick Help" box with a link: [Help About This Page](#).

The footer of the page contains the text: CMS/HHS Vulnerability Disclosure Policy | Privacy Policy | User Agreement | Adobe Reader.

Slide notes

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

Slide 24 of 48 - Add Account Designee

Add Account Designee

System checks that email is not in the database for existing user

- Existing user can be an Account Designee as long as they are not registered as an Account Representative for any MSPRP Account ID

**Slide notes**

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

Slide 25 of 48 - Designee Invitation Page

The screenshot shows the Medicare Secondary Payer Recovery Portal. At the top, there is a CMS logo and the title "Medicare Secondary Payer Recovery Portal" next to a photo of a smiling couple. Below the title is a green navigation bar with links: Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Sign off. The main content area is titled "Designee Invitation" and contains the following text: "Please provide the name and a passphrase for the designee to enter during the registration process." and "An asterisk (*) indicates a required field." There are four input fields: "*Designee First Name:", "*Designee Last Name:", "*Passphrase:", and "*Re-enter Passphrase:". Below these fields are three buttons: "Previous" (with a left arrow), "Continue" (with a right arrow), and "Cancel" (with a red X). To the right of the main form is a "Quick Help" box with a link "Help About This Page". At the bottom of the page is a blue footer bar with the text "CMS/HHS Vulnerability Disclosure Policy | Privacy Policy | User Agreement | Adobe Reader".

Slide notes

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

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

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

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

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

Slide 26 of 48 - Designee Confirmation Page

The screenshot shows the Medicare Secondary Payer Recovery Portal. The header includes the CMS logo, the portal title, and a photo of a smiling couple. A green navigation bar contains links: Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Sign off. The main content area is titled "Designee Confirmation" and includes a "Print this page" icon. The text states that a designee has been successfully added and will receive an email. It provides instructions on how to proceed and displays the designee's information: First Name: Jane, Last Name: Smith, and E-Mail Address: jsmith@abcassociates.com. At the bottom of the main area are "Continue" and "Cancel" buttons. A "Quick Help" sidebar on the right contains a link to "Help About This Page". The footer contains links to CMS/HHS Vulnerability Disclosure Policy, Privacy Policy, User Agreement, and Adobe Reader.

CMS
CENTERS FOR MEDICARE & MEDICAID SERVICES

Medicare Secondary Payer Recovery Portal

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

Designee Confirmation

 [Print this page](#)

The following Designee has been successfully added to the account. The designee will receive an e-mail notifying them that they have been invited to become a designee on the Account and may access the Account information by logging into the Medicare Secondary Payer Recovery Portal Web site. If the invited Designee is not currently a registered user, please contact the Designee and provide them with the passphrase you created; the passphrase is necessary for them to complete registration.

Click on the **Continue** button to return to the Designee Listing page. Click on the **Cancel** button to return to the MSPRP Home page.

First Name: Jane **Last Name:** Smith
E-Mail Address: jsmith@abcassociates.com

Continue  **Cancel** 

Quick Help

[Help About This Page](#)

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

Slide notes

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

Slide 27 of 48 - Designee Listing Page

The screenshot shows the Medicare Secondary Payer Recovery Portal. The header includes the CMS logo and the portal title. A green navigation bar contains links: Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Sign off. The main content area is titled 'Designee Listing' and includes a 'Print this page' icon. It contains instructional text about managing designees, a 'Quick Help' sidebar with a 'Help About This Page' link, and a table of account designees. The table has columns for Delete, Last Name, First Name, Email Address, Passphrase, Status, and Last Login Date. Three designees are listed: Smith (Active), Xiang (Pending), and Jones (Pending). The 'Status' column is highlighted with a red box. At the bottom of the table are 'Add Designee' and 'Cancel' buttons. A footer bar contains links to CMS/HHS Vulnerability Disclosure Policy, Privacy Policy, User Agreement, and Adobe Reader.

Designee Listing

This page provides the Designee(s) information for the individuals you have assigned to the account.

An Account Manager can only make changes to a pending Designee. Once the Designee has registered and has a Login ID, the Account Manager cannot make changes to the Designee information other than deleting the Designee from the account.

To make changes to the account of a particular Designee listed, select the link on the individual's last name. To delete a Designee select the Delete function to the left of the individual's name. Use the **Add Designee** function to include an individual as a designee. Individuals added as designees will receive an e-mail notifying them that they have been invited to be a designee for the account.

Selecting **Cancel** will return you to the Home Page.

Total Number of Account Designees: 6

[Clear Filters](#)

Delete	Last Name	First Name	Email Address	Passphrase	Status	Last Login Date
X	Smith	Jane	jane-s@company.com		Active	05/05/2019
X	Xiang	John	john-i@company.com	let me in	Pending	
X	Jones	John	john-i@company.com	let me in	Pending	

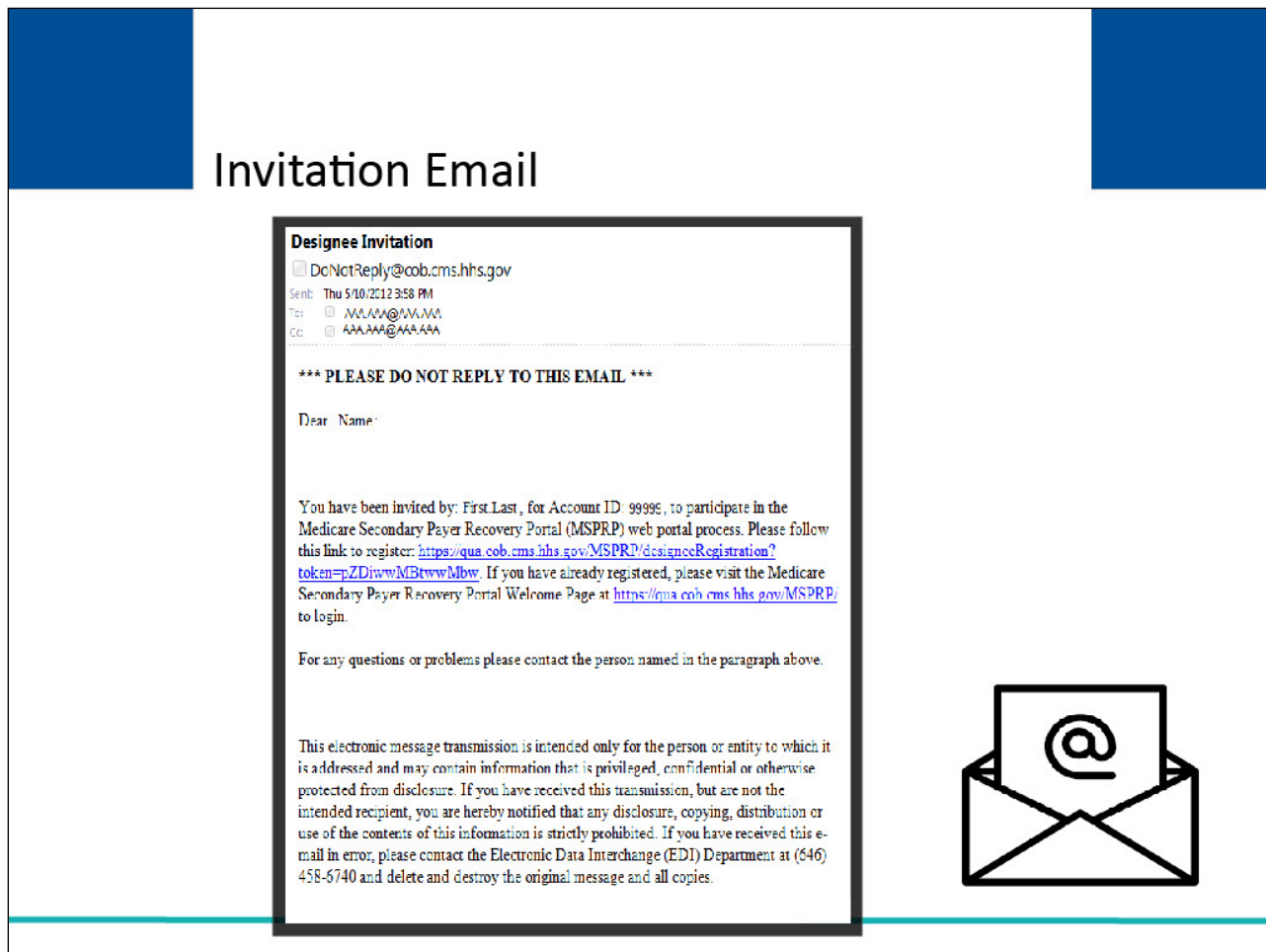
[Add Designee](#) [Cancel](#)

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

Slide notes

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

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

Slide 28 of 48 - Invitation E-mail**Slide notes**

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

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



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

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

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

Slide 29 of 48 - Update Account Designee

Update Account Designee

'Pending' Account Designees	<ul style="list-style-type: none">• Have not yet registered on MSPRP• Account Manager can edit personal information	
'Active' Account Designees	<ul style="list-style-type: none">• Account Manager can view personal information• Account Manager cannot make changes to Account Designee's information other than deleting them from the account	

Slide notes

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

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

Slide 30 of 48 - Designee Listing Page

Designee Listing

This page provides the Designee(s) information for the individuals you have assigned to the account.

An Account Manager can only make changes to a pending Designee. Once the Designee has registered and has a Login ID, the Account Manager cannot make changes to the Designee information other than deleting the Designee from the account.

To make changes to the account of a particular Designee listed, select the link on the individual's last name. To delete a Designee select the Delete function to the left of the individual's name. Use the **Add Designee** function to include an individual as a designee. Individuals added as designees will receive an e-mail notifying them that they have been invited to be a designee for the account.

Selecting **Cancel** will return you to the Home Page.

Total Number of Account Designees: 6

[Clear Filters](#)


Delete	Last Name	First Name	Email Address	Passphrase	Status	Last Login Date
X	Smith	Jane	jane-s@company.com		Active	05/05/2019
X	Xiang	John	john-i@company.com	let me in	Pending	
X	Jones	John	john-i@company.com	let me in	Pending	

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

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

Slide notes

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

Slide 31 of 48 - Update Designee Information Page

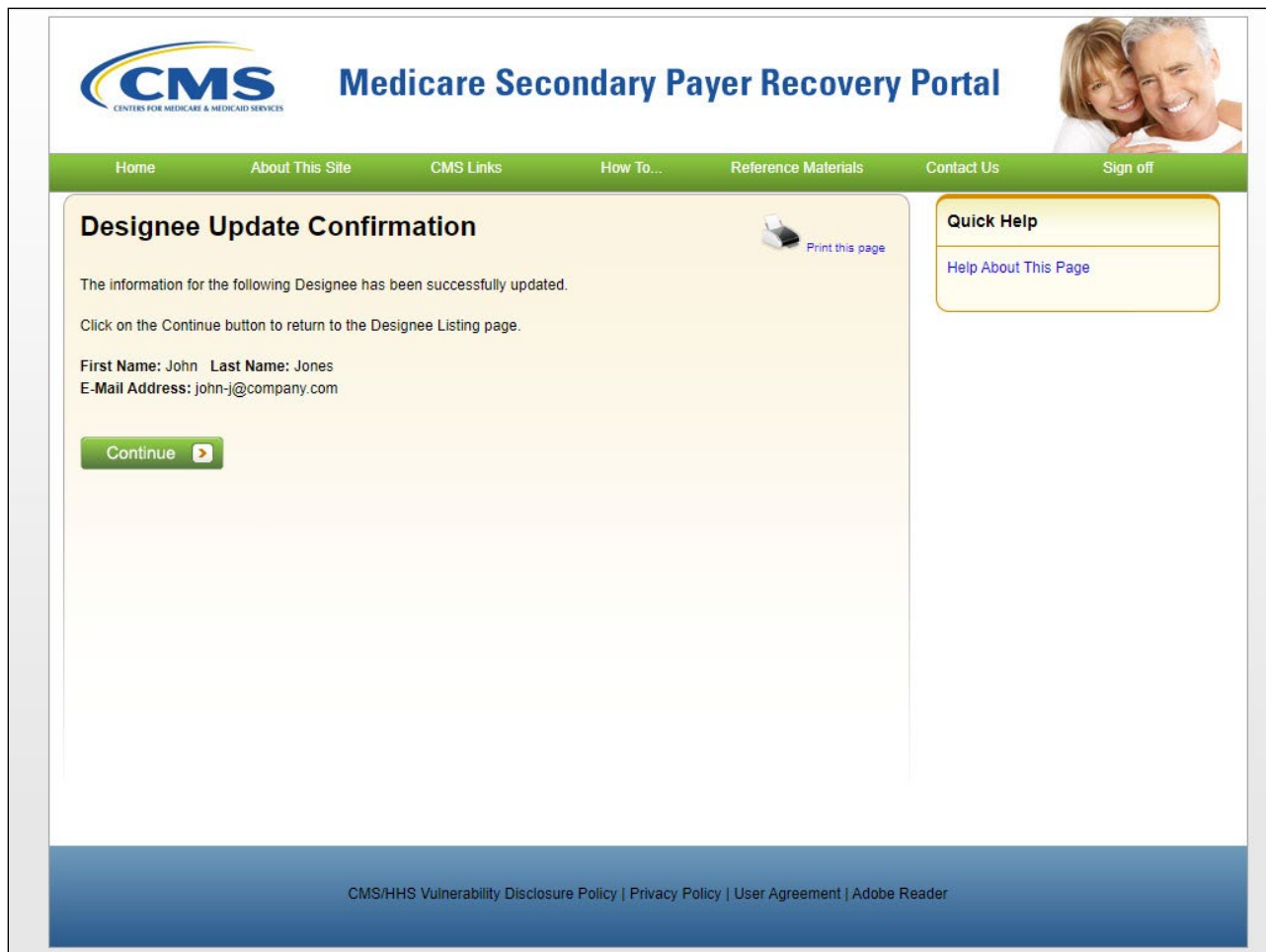
The screenshot shows the 'Update Designee Information' page of the Medicare Secondary Payer Recovery Portal. The page features a green navigation bar with links: Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Sign off. The CMS logo is in the top left, and a photo of a smiling couple is in the top right. The main content area has a yellow background and contains the following elements:

- Update Designee Information** (Section Header)
- Instructions: "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."
- Note: "An asterisk (*) indicates a required field."
- Form fields:
 - *Designee First Name: John
 - *Designee Last Name: Jones
 - *Designee Email Address: john-j@company.com
 - *Re-enter Designee Email: (empty)
 - *Passphrase: let me in
 - *Re-enter Passphrase: (empty)
- Checkbox: ☐ Regenerate token. Check this box if another invitation e-mail must be sent to the Designee.
- Buttons: Continue (green) and Cancel (grey).

A 'Quick Help' sidebar on the right contains a link: [Help About This Page](#). The footer contains links: CMS/HHS Vulnerability Disclosure Policy | Privacy Policy | User Agreement | Adobe Reader.

Slide notes

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

Slide 32 of 48 - Designee Update Confirmation Page**Slide notes**

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

Slide 33 of 48 - Regenerate Invitation Email

Regenerate Invitation Email

- If Account Designee misplaces/deletes email or has not registered within 30 days
 - Account Manager can regenerate email
 - Only for Account Designees in 'Pending' status
- Previous link will not work once new email is generated

**Slide notes**

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

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

Slide 34 of 48 - Designee Listing Page

The screenshot shows the Medicare Secondary Payer Recovery Portal. The header includes the CMS logo and the portal title. A green navigation bar contains links: Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Sign off. The main content area is titled "Designee Listing" and includes instructions on how to manage designees. A table lists three designees: Smith (Active), Xiang (Pending), and Jones (Pending). The "Xiang" entry is highlighted with a red box. Below the table are buttons for "Add Designee" and "Cancel". A "Quick Help" sidebar on the right contains a "Help About This Page" link. The footer contains links to CMS/HHS policies.

Designee Listing

This page provides the Designee(s) information for the individuals you have assigned to the account.

An Account Manager can only make changes to a pending Designee. Once the Designee has registered and has a Login ID, the Account Manager cannot make changes to the Designee information other than deleting the Designee from the account.

To make changes to the account of a particular Designee listed, select the link on the individual's last name. To delete a Designee select the Delete function to the left of the individual's name. Use the **Add Designee** function to include an individual as a designee. Individuals added as designees will receive an e-mail notifying them that they have been invited to be a designee for the account.

Selecting **Cancel** will return you to the Home Page.

Total Number of Account Designees: 6

[Clear Filters](#)

Delete	Last Name	First Name	Email Address	Passphrase	Status	Last Login Date
X	Smith	Jane	jane-s@company.com		Active	05/05/2019
X	Xiang	John	john-i@company.com	let me in	Pending	
X	Jones	John	john-i@company.com	let me in	Pending	

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

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

Slide notes

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

Slide 35 of 48 - Update Designee Information Page

The screenshot shows the 'Update Designee Information' page of the Medicare Secondary Payer Recovery Portal. The page has a green header with the CMS logo and navigation links: Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Sign off. A photo of a smiling couple is in the top right corner. The main content area is titled 'Update Designee Information' and contains instructions: '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.' and 'An asterisk (*) indicates a required field.' Below this are input fields for: *Designee First Name (John), *Designee Last Name (Jones), *Designee Email Address (john-j@company.com), *Re-enter Designee Email, *Passphrase (let me in), and *Re-enter Passphrase. A checkbox labeled 'Regenerate token. Check this box if another invitation e-mail must be sent to the Designee.' is highlighted with a red rectangle. At the bottom are 'Continue' and 'Cancel' buttons. A 'Quick Help' sidebar on the right contains a link 'Help About This Page'. The footer contains links for CMS/HHS Vulnerability Disclosure Policy, Privacy Policy, User Agreement, and Adobe Reader.

Update Designee Information

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:

*Designee Last Name:

*Designee Email Address:

*Re-enter Designee Email:

*Passphrase:

*Re-enter Passphrase:

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

Quick Help

[Help About This Page](#)

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

Slide notes

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

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


Designee Listing

This page provides the Designee(s) information for the individuals you have assigned to the account.

An Account Manager can only make changes to a pending Designee. Once the Designee has registered and has a Login ID, the Account Manager cannot make changes to the Designee information other than deleting the Designee from the account.

To make changes to the account of a particular Designee listed, select the link on the individual's last name. To delete a Designee select the Delete function to the left of the individual's name. Use the **Add Designee** function to include an individual as a designee. Individuals added as designees will receive an e-mail notifying them that they have been invited to be a designee for the account.

Selecting **Cancel** will return you to the Home Page.

Total Number of Account Designees: 6

[Clear Filters](#)

Delete	Last Name	First Name	Email Address	Passphrase	Status	Last Login Date
	Smith	Jane	jane-s@company.com		Active	05/05/2019
	Xiang	John	john-i@company.com	let me in	Pending	
	Jones	John	john-i@company.com	let me in	Pending	

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

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

Slide notes

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

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

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

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

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

Slide 37 of 48 - Delete Designee Confirmation Page

The screenshot shows the Medicare Secondary Payer Recovery Portal interface. At the top, there is a CMS logo and the title 'Medicare Secondary Payer Recovery Portal' next to a photo of a smiling couple. A green navigation bar contains links: Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Sign off. The main content area is titled 'Delete Designee Confirmation' and includes a 'Print this page' icon. The text explains that clicking 'Continue' will remove the designee from the account ID, while clicking 'Cancel' will return to the Designee Listing page. The designee's details are listed: First Name: Jane, Last Name: Smith, and E-Mail Address: jsmith@abcassociates.com. At the bottom of the main area are two buttons: 'Continue' (green with a right arrow) and 'Cancel' (grey with a red X). To the right, a 'Quick Help' box contains a link to 'Help About This Page'. The footer contains links for CMS/HHS Vulnerability Disclosure Policy, Privacy Policy, User Agreement, and Adobe Reader.

Delete Designee Confirmation  [Print this page](#)

Please click on the Continue button to confirm your delete request for this Account Designee. This will remove the individual from this Account ID only. The Designee will no longer have access to this Account ID but will retain access to any other 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: Jane Last Name: Smith
E-Mail Address: jsmith@abcassociates.com

[Continue](#) [Cancel](#)

Quick Help
[Help About This Page](#)

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

Slide notes

The Designee Confirmation page will appear.

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

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

Slide 38 of 48 - Welcome! Page

The screenshot shows the 'Welcome!' page of the Medicare Secondary Payer Recovery Portal. The page has a light yellow header and a white main content area. On the right side, there is a yellow box titled 'Account Settings' containing four links: 'Update Account Information', 'Designee Maintenance', 'View Account Activity', and 'Update Paperless E-mail Distribution'. The main content area starts with a 'Welcome!' heading, followed by the account information 'Account: 30401 ABC Corporation' with a green checkmark icon. Below this, there are several paragraphs of text explaining the portal's purpose and how to use it. A red box highlights the 'Request Case Access' link, which is the first link in a list of five: 'Request Case Access', 'Case Listing', 'Report A Case', 'Open Debt Report', and 'Go Paperless Letter Notifications'. At the bottom left, there is a green button with a left arrow and the text 'Previous'. A 'Note' at the bottom of the main content area states: 'Note: You will not be able to use the links below until your Profile Report has been returned.'

Welcome!

Account: 30401 ABC Corporation

The Medicare Secondary Payer Recovery Portal provides a quick and efficient way to request case information and provide information to assist in resolving Medicare's recovery claim.

With the use of this portal, you may submit a valid authorization, request an update conditional payment amount, submit settlement information and dispute claims.

You may view the account activity by clicking the appropriate link under the Account Settings.

To request information regarding a case you have not already associated to your account, click the Request Case Access link below.

To see cases that you have previously associated to your account, click the Case Listing link below.

To submit a case, click the Report A Case link below.

To request an Open Debt Report, click the Open Debt Report link below.

To view/print "Paperless" letter notification e-mails and letters, click the Go Paperless Letter Notifications link below.

Note: You will not be able to use the links below until your Profile Report has been returned.

[Request Case Access](#)

[Case Listing](#)

[Report A Case](#)

[Open Debt Report](#)

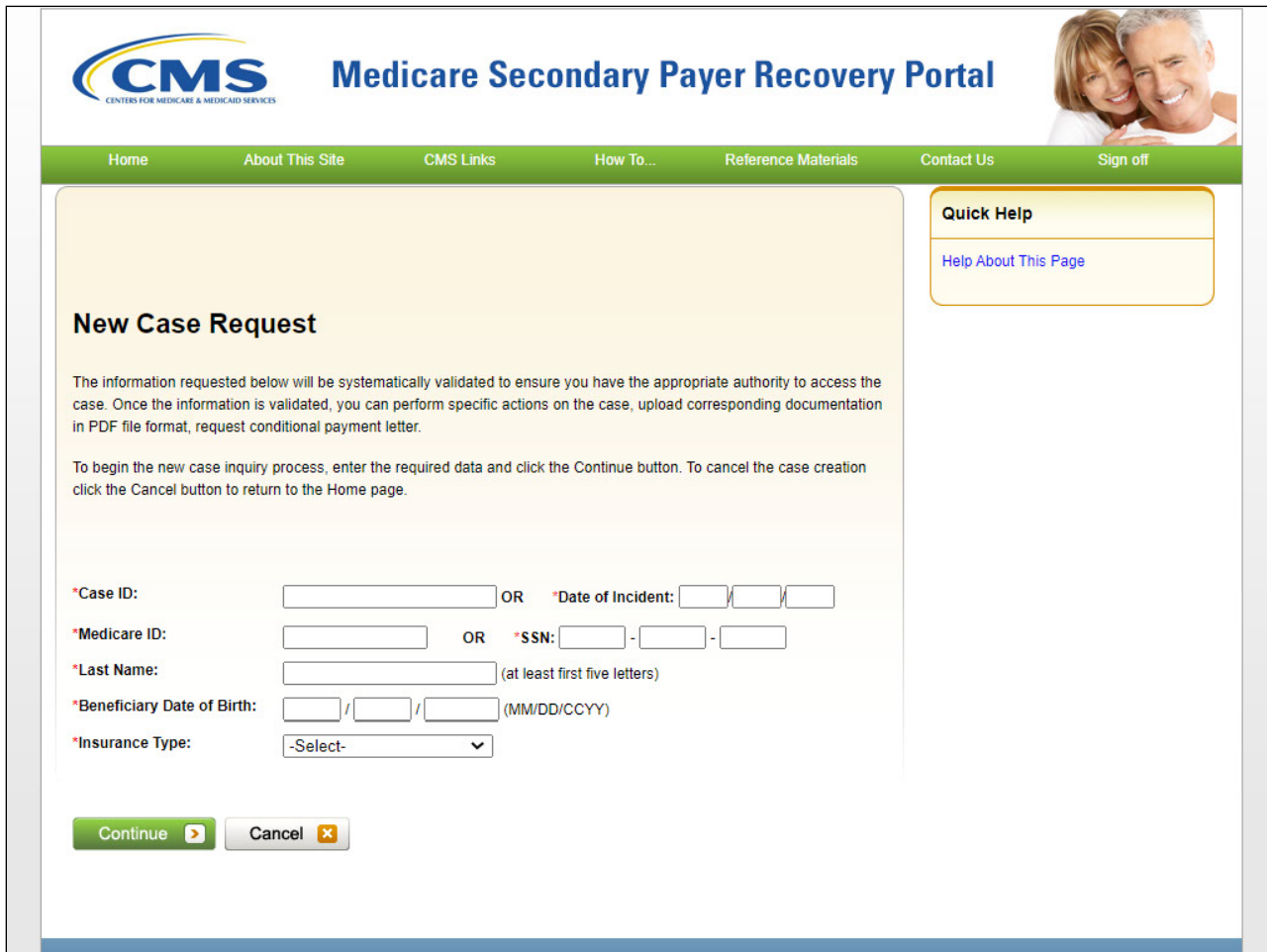
[Go Paperless Letter Notifications](#)

Previous

Slide notes

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

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

Slide 39 of 48 - New Case Request Page

The screenshot shows the Medicare Secondary Payer Recovery Portal. At the top, there is a CMS logo and the title "Medicare Secondary Payer Recovery Portal". Below the title is a navigation bar with links: Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Sign off. On the right side, there is a "Quick Help" section with a link "Help About This Page". The main content area is titled "New Case Request" and contains the following text:

The information requested below will be systematically validated to ensure you have the appropriate authority to access the case. Once the information is validated, you can perform specific actions on the case, upload corresponding documentation in PDF file format, request conditional payment letter.

To begin the new case inquiry process, enter the required data and click the Continue button. To cancel the case creation click the Cancel button to return to the Home page.

The form fields are:

- *Case ID: OR *Date of Incident: / /
- *Medicare ID: OR *SSN: - -
- *Last Name: (at least first five letters)
- *Beneficiary Date of Birth: / / (MM/DD/CCYY)
- *Insurance Type:

At the bottom of the form, there are two buttons: "Continue" (green) and "Cancel" (grey).

Slide notes

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

Case ID or Date of Incident (DOI),
Beneficiary Medicare ID or Social Security Number (SSN),
Beneficiary Last Name,
Beneficiary Date of Birth, and
the Insurance Type.

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

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

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

cases referred to CMS,
cases referred to Department of Justice, and
cases involving Workers' Compensation Medicare Set-Aside Amount (WCMSA).

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

For information on the WCMSAP, see the following link: [WCMSAP Website](#).

Slide 40 of 48 - Case Information Page

The screenshot displays the 'Case Information' page within a web application. At the top, a green navigation bar contains links: Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Sign off. Below the navigation bar, the page title 'Case Information' is prominently displayed. To the right of the title, there is a 'Print this page' icon and a 'Quick Help : Help About This Page' button. The main content area is divided into two primary sections. The upper section, titled 'Case Information', contains a grid of fields. On the left, it lists 'Case ID: 201117409000150', 'Case Type: Liability Insurance', 'Case Status: Demand' (with a 'What is this?' link), 'Current Status of Debt: Intent to Refer Letter Sent', 'RRE Name: Sample Name', 'Date of Incident: 09/15/2009', 'Industry Date of Incident: 09/15/2009' (with a 'What is this?' link), and 'ORM: Yes'. On the right, it lists 'Medicare ID: 987654321A', 'Beneficiary DOB: 02/08/1940', 'Beneficiary Last Name: Smith', 'Treasury Account Number: 12345678', 'Treasury Referral Date: 01/01/2016', 'Authorization Level: Proof of Representation', 'Authorization Status: Verified' (with a 'What is this?' link), and 'ORM Termination Date: 01/01/2016'. Below this, a horizontal tabbed interface is shown with 'Payment Information' selected. Other tabs include 'Electronic Payment History', 'Refund Information', 'Correspondence Activity', 'Waiver/Redetermination/Appeal/Compromise', and 'Final Conditional Payment Process'. The 'Payment Information' section contains a note about the current conditional payment amount of \$2,800.00, a disclaimer about claim retrieval, and a contact number for the BCRC or CRC. It also lists 'Rights and Responsibilities Letter Mail Date: 06/10/2010' and 'Section 111 No-Fault Policy Limit Reported: \$32456.76'. At the bottom, it shows 'Conditional Payment Letter Amount: \$496.06', 'Conditional Payment Letter Mail Date: 06/01/2011', 'Conditional Payment Notice Amount: \$500.00', 'Conditional Payment Notice Mail Date: 06/18/2011', and 'Conditional Payment Notice Response Due Date: 07/31/2011'.

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Case Information

Print this page Quick Help : [Help About This Page](#)

Case ID: 201117409000150	Medicare ID: 987654321A
Case Type: Liability Insurance	Beneficiary DOB: 02/08/1940
Case Status: Demand What is this?	Beneficiary Last Name: Smith
Current Status of Debt: Intent to Refer Letter Sent	Treasury Account Number: 12345678
RRE Name: Sample Name	Treasury Referral Date: 01/01/2016
Date of Incident: 09/15/2009	Authorization Level: Proof of Representation
Industry Date of Incident: 09/15/2009 What is this?	Authorization Status: Verified What is this?
ORM: Yes	ORM Termination Date: 01/01/2016

Payment Information Electronic Payment History Refund Information Correspondence Activity Waiver/Redetermination/Appeal/Compromise Final Conditional Payment Process

*Current Conditional Payment Amount: \$2,800.00

**Note: Claims are retrieved daily. This amount is current as of: 07/23/2018. Please be advised that the claims associated to this case are currently being evaluated for relevance. This typically takes 3-5 business days. The conditional payment amount will be automatically updated once this process is complete. Please contact the BCRC or CRC at (855) 796-2627 if immediate assistance with this amount is required.*

Rights and Responsibilities Letter Mail Date: 06/10/2010 Section 111 No-Fault Policy Limit Reported: \$32456.76

Conditional Payment Letter Amount: \$496.06 Conditional Payment Notice Amount: \$500.00
Conditional Payment Letter Mail Date: 06/01/2011 Conditional Payment Notice Mail Date: 06/18/2011
Conditional Payment Amount Update Requested: 06/01/2011 Conditional Payment Notice Response Due Date: 07/31/2011

Slide notes

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

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

Slide 41 of 48 - Case Information Page - Case Actions

Interest Activity Amount: \$149.79

[Make a Payment](#) [What is this?](#) *Note: Remaining balance amounts may not reflect recent payments.*

Please select an action from the following list, if the option is disabled (grayed out) it may not be available for the case at this time:

- ☐ View / Request Authorizations
- ☐ Request an update to the conditional payment amount [What is this?](#)
- ☐ Request an electronic conditional payment letter with Current Conditional Payment Amount [What is this?](#)
- ☐ Request a mailed copy of the conditional payment letter [What is this?](#)
- ☐ Begin Final Conditional Payment Process and Provide 120 Days' Notice of Anticipated Settlement [What is this?](#)
- ☐ Calculate Final Conditional Payment Amount [What is this?](#)
- ☐ Request an electronic Dispute Denial for Final Conditional Payment Case Letter with Current Conditional Payment Amount [What is this?](#)
- ☐ View / Dispute Claims Listing [What is this?](#)
- ☐ View/Provide the Notice of Settlement Information [What is this?](#)
- ☐ Initiate Demand Letter [What is this?](#)
- ☐ View / Submit Redetermination (First Level Appeal) [What is this?](#)
- ☐ Submit Waiver Request [What is this?](#)
- ☐ Submit Compromise Request [What is this?](#)
- ☐ Submit Case Documentation [What is this?](#)

[Previous](#) [Continue](#) [Cancel](#)

Slide notes

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

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

Request an update to the conditional payment amount

Request an electronic conditional payment letter with Current Conditional Payment Amount

Request a mailed copy of the conditional payment letter

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

Calculate Final Conditional Payment Amount

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

View/Dispute Claims Listing

View/Provide the Notice of Settlement Information

Initiate Demand Letter

View/Submit Redetermination

Submit Waiver Request

Submit Compromise Request

Submit Case Documentation

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

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

Slide 42 of 48 - Welcome! Page

The screenshot shows the 'Welcome!' page of the Medicare Secondary Payer Recovery Portal. The page has a light yellow header and a white main content area. On the right side, there is a yellow box titled 'Account Settings' containing four links: 'Update Account Information', 'Designee Maintenance', 'View Account Activity', and 'Update Paperless E-mail Distribution'. The main content area starts with a 'Welcome!' heading, followed by the account information 'Account: 30401 ABC Corporation' with a green checkmark icon. Below this, there are several paragraphs of text explaining the portal's purpose and how to use it. At the bottom, there is a list of links: 'Request Case Access', 'Case Listing' (which is highlighted with a red rectangle), 'Report A Case', 'Open Debt Report', and 'Go Paperless Letter Notifications'. A green 'Previous' button is located at the bottom left of the page.

Welcome!

Account: 30401 ABC Corporation

The Medicare Secondary Payer Recovery Portal provides a quick and efficient way to request case information and provide information to assist in resolving Medicare's recovery claim.

With the use of this portal, you may submit a valid authorization, request an update conditional payment amount, submit settlement information and dispute claims.

You may view the account activity by clicking the appropriate link under the Account Settings.

To request information regarding a case you have not already associated to your account, click the Request Case Access link below.

To see cases that you have previously associated to your account, click the Case Listing link below.

To submit a case, click the Report A Case link below.

To request an Open Debt Report, click the Open Debt Report link below.

To view/print "Paperless" letter notification e-mails and letters, click the Go Paperless Letter Notifications link below.

Note: You will not be able to use the links below until your Profile Report has been returned.

[Request Case Access](#)

[Case Listing](#)

[Report A Case](#)

[Open Debt Report](#)

[Go Paperless Letter Notifications](#)


Previous

Slide notes

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

Slide 43 of 48 - Case Listing Page

Case Listing

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

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

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

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

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

Case ID: [Search Hint](#)


Medicare ID:

Beneficiary SSN: - -

Beneficiary Last Name: [Search Hint](#)

Cases

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

Select	Case ID	Bene Last Name	Medicare ID	Bene Date of Birth	Case Status	Authorization Level	Authorization Status	Case Access
<input type="checkbox"/>	201117409000150 	Smith	*****9999A	09/01/1940	Demand	Beneficiary Proof of Representation	Verified	Manage Access
<input type="checkbox"/>	201117409000151	Jones	*****8888B	04/19/1945	Closed			Manage Access
<input type="checkbox"/>	201117409000152 *	Williams	*****7777B	08/20/1939	DEMAND IN PROGRESS	Beneficiary Consent to Release	Verified	Manage Access

Slide notes

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

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

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

Slide 44 of 48 - Manage Case Access Page

CMS Medicare Secondary Payer Recovery Portal

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Manage Case Access

Case ID: 201117409000150 Beneficiary Last Name: Smith

You may select a designee by checking the checkbox next to their name. To select all Designees, click the Select All checkbox. To remove all previously selected designees, click on the Select All checkbox twice.

Click the Previous button to return to the Case Listing page. Click the Cancel button to return to the Home Page.

Grant/Revoke Access	Designee Name
<input checked="" type="checkbox"/>	Jane Smith
<input checked="" type="checkbox"/>	John Doe
<input type="checkbox"/>	First Last
<input type="checkbox"/> Select All	

[Print this page](#)

[Quick Help](#)
[Help About This Page](#)

[Continue](#) [Cancel](#)

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Slide notes

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

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

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


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

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

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

Slide 45 of 48 - Manage Case Access Confirmation

The screenshot shows the Medicare Secondary Payer Recovery Portal. The header includes the CMS logo and the title 'Medicare Secondary Payer Recovery Portal'. A green navigation bar contains links: Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Sign off. The main content area is titled 'Manage Case Access Confirmation' and includes a 'Print this page' icon. It displays 'Case ID: 201117409000150' and 'Beneficiary Last Name: Smith'. A message states: 'You have successfully submitted changes to case access. Click the Previous button to return to the Manage Case Access page. Click the Continue button to return to the Case Listing page. Click the Cancel button to return to the Home Page.' Below this, it says 'The following Designees have access to the case:' and lists 'Jane Smith' and 'John Doe' under the heading 'Designee Name'. A green 'Continue' button with a right arrow is highlighted with a red box. A 'Quick Help' sidebar on the right contains a 'Help About This Page' link. The footer contains links for CMS/HHS Vulnerability Disclosure Policy, Privacy Policy, User Agreement, and Adobe Reader.

Manage Case Access Confirmation  [Print this page](#)


Case ID: 201117409000150 Beneficiary Last Name: Smith

You have successfully submitted changes to case access.

Click the Previous button to return to the Manage Case Access page. Click the Continue button to return to the Case Listing page. Click the Cancel button to return to the Home Page.

The following Designees have access to the case:

Designee Name
Jane Smith
John Doe

Continue 

Quick Help
[Help About This Page](#)

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Slide notes

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

Slide 46 of 48 - Course Summary



Course Summary

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



Slide notes

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

Slide 47 of 48 - Conclusion

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

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

Slide notes



You have completed the MSPRP Account Manager Basic Functions course. Information in this course can be referenced by using the MSPRP User Manual found at the following link:

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

For general information on Medicare Secondary Payer Recovery, go to this URL:

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

Slide 48 of 48 - MSPRP Training Survey



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

Slide notes

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