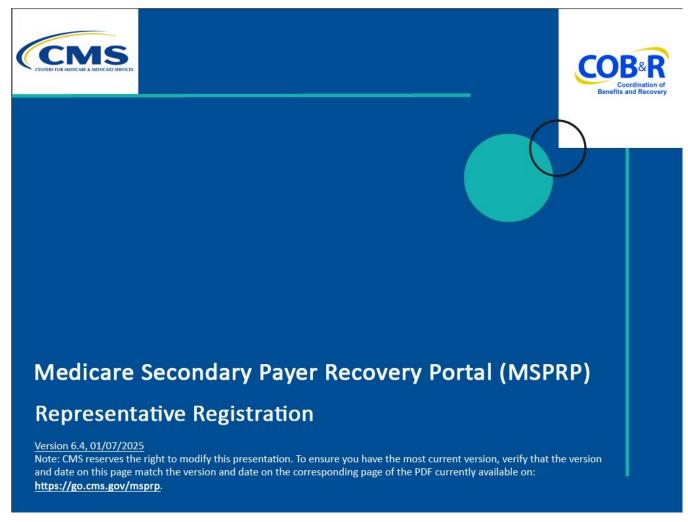
Representative Registration Introduction

Slide 1 of 24 - Representative Registration Introduction



Slide notes

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

Slide 2 of 24 - 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: <u>https://www.cob.cms.hhs.gov/MSPRP/</u>.

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: <u>CMS MSPRP Website.</u>

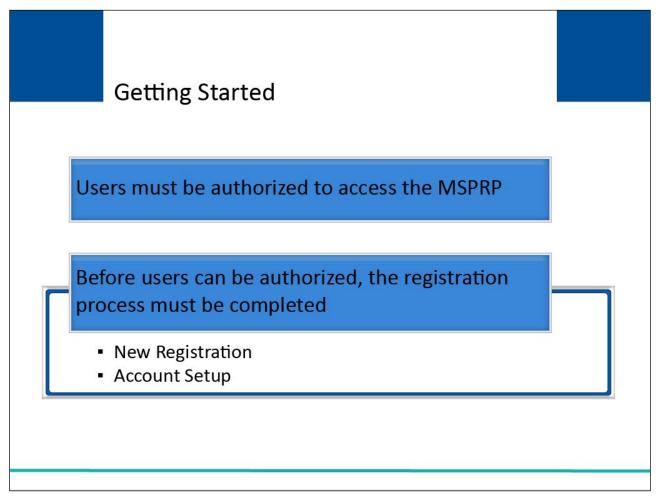
Slide 3 of 24 - Course Overview



Slide notes

This course will provide instruction on how to complete a New Registration on the MSPRP for a representative account type and the steps that must be followed once the registration has been submitted.

Slide 4 of 24 - Getting Started



Slide notes

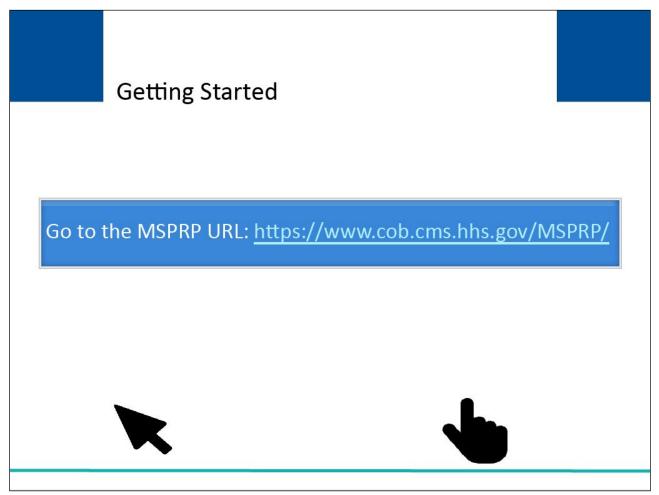
Users must be authorized to access the MSPRP. Before a new user can become authorized, the representative entity must complete the registration process which involves the following steps:

New Registration and

Account Setup.

Note: The focus of this CBT is on the New Registration process. For more information on Account Setup, please see the <u>Representative Account Setup</u> CBT.

Slide 5 of 24 - Getting Started



Slide notes

To begin the New Registration process, go to the following MSPRP URL: <u>CMS MSPRP Website</u>.

Its important to remember, this course is intended for those entities who will register for a representative account. A representative account type indicates that the entity does not have an Employer Identification Number (EIN)/Tax Identification Number (TIN) but may have involvement in multiple cases. Representative accounts may have up to five Account Designees.

Slide 6 of 24 - Login Warning Page

Login Warning	Print this page
	Print this page
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.	
I Accept	
Decline	

Slide notes

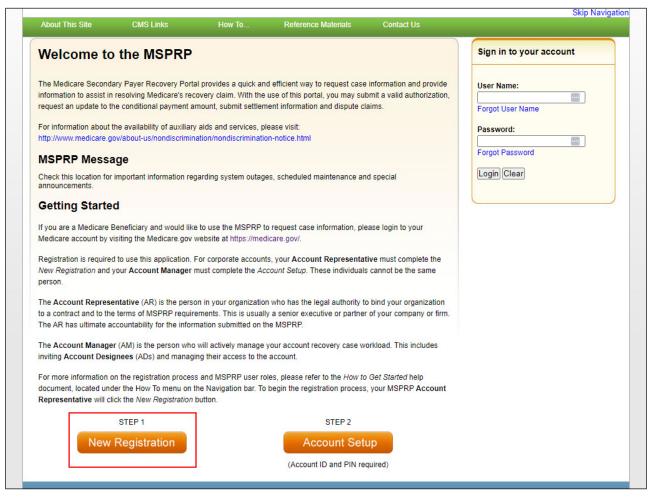
Each time a user visits the MSPRP website, the Login Warning page will appear. This page provides information about MSPRP security measures including access, penalty, and privacy laws.

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

Scroll to the bottom of this page to review the entire statement. Users must agree to the terms of this warning each time they access the MSPRP.

Click the I Accept link at the bottom of the page to continue with the New Registration step.

Slide 7-of 24 - Welcome to the MSPRP/Login Page



Slide notes

Once the I Accept link is clicked, the MSPRP Login page will appear. Click the New Registration button to continue.

Slide 8 of 24 - Select Account Type Page

corporate account type indicates that the entity has an Employer Identification Number (EIN) and will be regularly ibmitting MSPRP requests.	elect Account Type use select the type of account for which you a orporate	are registering:			Quick Help Help About This P	age
	epresentative presentative account type indicates that the e larly submitting MSPRP requests.	entity does not have an E	Employer Identificatio	n Number (EIN) but will be		

Slide notes

The Select Account Type page will appear. Select the Representative radio button and click Continue.

Note: If at any point during the registration process the user wishes to stop, they should click Cancel.

Once clicked, information entered on the current page and any previous pages will NOT be saved and the user will be returned to the MSPRP Login page.

Slide 9 of 24 -	Representative	Information Page
	noprocontativo	

Representative					
roprosontativo	Informati	on		Quick Help	
An asterisk (*) indicates a req	uired field.			Help About This	Page
First Name:		MI:	*Last Name:		
Social Security Number:	!-				
E-Mail Address:					
Re-enter E-Mail Address:					
Phone:		ext. [
'Fax:]-[]			
Mailing Address					
Address Line 1:					
Address Line 2:					
City:					
State:	Please Select	~			
Zip Code:					

Slide notes

The Representative Information page will appear. Information for the representative account that will be submitting MSPRP requests must be entered on this page.

All fields denoted with a red asterisk are required.

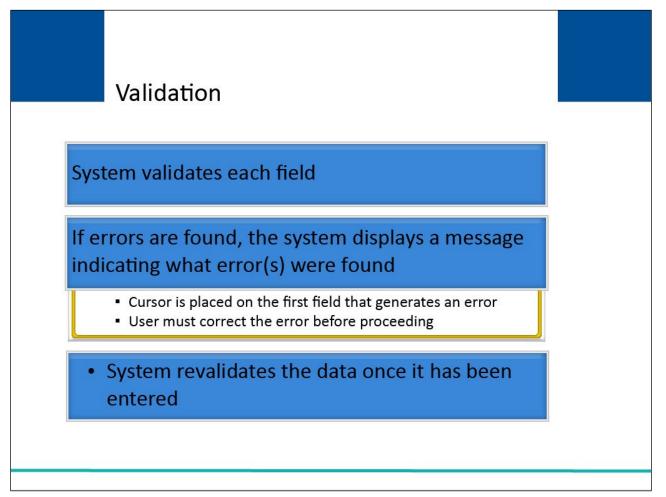
The Social Security Number must be unique in the MSPRP. It cannot be registered for more than one account.

Additionally, it cannot be the same as the Social Security Number of the associated Beneficiary (i.e., a user cannot register on behalf of themselves).

The email address submitted on this page will be used to send the post-registration email that includes the Personal Identification Number (PIN).

Once all required information has been entered, you must click Continue.

Slide 10 of 24 - Validation



Slide notes

The system will validate each field on each registration page for accuracy and completeness.

If errors are found, the system will show applicable error messages on the screen indicating what error condition(s) were found.

When errors are discovered, the cursor will be placed on the first field that generates an error condition.

This will either be a required field that is missing data or a field that contains a data error.

The user must correct the error before the system will allow the user to proceed to the next page. Once the data has been corrected, the system will revalidate all data that has been entered.

Slide 11 of 24 - Beneficiary Information Page

	About This Site	CMS Links	How To	Reference Materials	Contact Us	Sign off
Beneficiary	Information	n			Quick Help	
An asterisk (*) indicates	a required field.				Help About This	Page
Beneficiary Last Nam	e:		*First Initial:			
Medicare ID(MBI):						
Beneficiary Social Se	curity Number			Medicare ID is not provided)		
Beneficiary Date of B	irth:		(MM/DD/CCYY)			
Beneficiary Gender:		- Select - 🗸				
Previous	Continue ≥	Cancel 🔀				

Slide notes

After successfully completing the Representative Information page, the Beneficiary Information page will appear.

Enter information for a beneficiary associated with a case(s) that will be accessed using this account. All fields are required.

Note: The Social Security Number (SSN) is required if the Medicare ID is not provided.

After entering the beneficiary information, click Continue to proceed.

The MSPRP will attempt to determine if the entered information can be matched to a Medicare beneficiary. The system will find an exact Social Security match.

Then at least three out of four of the following fields must be matched exactly:

- First six characters of the Last Name
- First Initial
- Date of Birth
- Gender

If a match is not found, the user will receive an error message that states, "Data does not match what is on our records for the Beneficiary" and registration may not continue.

Slide 12 of 24 - Registration Summary Page

Home About This Site	CMS Links	How To	Reference Materials	Contact Us	Sign off
Registration Summary			Print this page	Quick Help	
Please review your registration information. If y with the information, click the Continue button to Please note: all data will be lost. Click the Prev	to submit the registration. C	Click the Cancel butto	lit button. If you are satisfied on to cancel the process.	Help About This I	Page
Account Type: Representative	dit				
Representative Information	Beneficiary	Information	Edit		
First Name: Jane MI: A	Last Name	e: Doe First Initial:			
Last Name: Smith	Medicare I	D: 987654321A			
SSN: 999-99-9999	SSN:				
E-Mail Address: jsmith@abcassociates.com	Date of Bir	rth: July 20, 1940			
Phone: 410- 832- 8350 ext. 9877	Gender: M	lale			
Fax: 410- 832- 8999					
Representative Mailing Address:					
Address Line 1: 200 Test Avenue					
Address Line 2: Suite 2-B					
City: Towson					
State: Maryland					
Zip Code: 21204- 3276					

Slide notes

As long as the MSPRP was able to validate the beneficiary information (i.e., the entered information was matched to a Medicare beneficiary), the Registration Summary page will appear.

Users can print this page by clicking the Print this page link.

This page lists all the information that was previously entered and provides users with the opportunity to make changes. All information should be reviewed and verified before continuing.

Changes can be made to Account Type, Representative Information, or Beneficiary Information. To make any corrections, click the Edit button next to the applicable section. The system will show that information entry page.

Slide 13 of 24 - Beneficiary Information Page

ation			Quick Help Help About This F	
eld.			Hole About This F	
			Help About This F	^o age
	First Initial:			
	OR			
per	(SSN is required if M	edicare ID is not provided)		
	(MM/DD/CCYY)			
- Select - 🗸				
e 💿 Cancel 🔀				
	ber	er OR . (SSN is required if Mr 	OR ber - (SSN is required if Medicare ID is not provided) / / / / / / / / / / / / - Select - ▼	OR OR

Slide notes

Add, change, or delete any of the information. Once all corrections have been made, you must click Continue until they have navigated back to the Registration Summary page.

Slide 14 of 24 - Registration Summary Page

Home About This Site	CMS Links	How To	Reference Materials	Contact Us	Sign off
Registration Summary				Quick Help	
Please review your registration information. If yo with the information, click the Continue button to Please note: all data will be lost. Click the Previo	submit the registration. (Click the Cancel butt	on to cancel the process.	Help About This	Page
Account Type: Representative	lit				
Representative Information Edit	Beneficiary	Information	Edit		
First Name: Jane MI: A	Last Name	e: Doe First Initial:	J		
Last Name: Smith	Medicare	ID: 987654321A			
SSN: 999-99-9999	SSN:				
E-Mail Address: jsmith@abcassociates.com	Date of Bi	rth: July 20, 1940			
Phone: 410- 832- 8350 ext. 9877	Gender: M	fale			
Fax: 410- 832- 8999					
Representative Mailing Address:					
Address Line 1: 200 Test Avenue					
Address Line 2: Suite 2-B					
City: Towson					
State: Maryland					
Zip Code: 21204- 3276					

Slide notes

When the Registration information has been verified, click Continue to submit the registration.

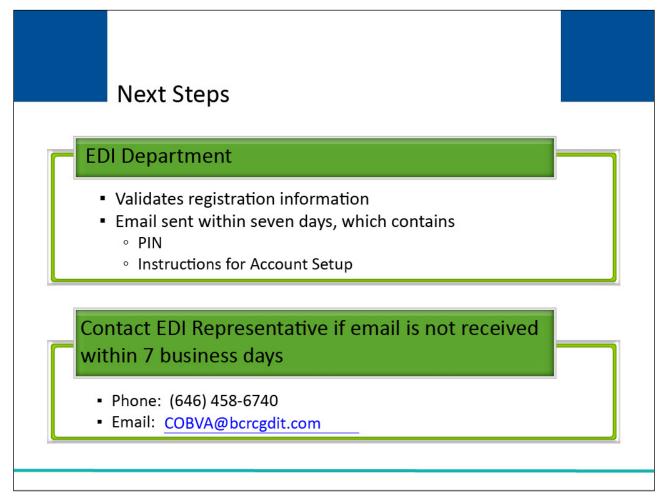
Slide 15 of 24	- MSPRP Regi	stration Com	pleted Succe	ssfully – Than	k vou Page
				Soluty - Inan	k you i ugo

						ACC .
MSPRP Regi	stration Con	npleted Succ	essfully. Ti	nank You		Print this page
You have successfully co print this page for your re		tration for the Medicare §	Secondary Payer Rec	overy Portal Web site Your a	ssigned Account ID is: 12	2345. It is important to
Next Steps						
The information captured Account Representative (an appropriate submitter. Afte 1 the Account ID.	er successful vetting, an e	email will be sent to the
Account Setup						
				ropriate Account Manager re ount ID and PIN on the Acco		
If your AR does not receiv	e the PIN email within	7 business days, please	contact an EDI Repre	sentative by phone at: (646)	458-6740 or e-mail at: C	OBVA@ bcrcgdit.com.
Exit D						
	CMS/HI	HS Vulnerability Disclosu	ire Policy Privacy Po	licy User Agreement Adob	a Reader	

Slide notes

The MSPRP Registration Completed Successfully - Thank You page displays confirmation that the initial registration has been successfully completed. The assigned Account ID will appear on the Thank You page and will need to be recorded by the representative to provide in the Account Setup - Step 2 process.

Slide 16 of 24 - Next Steps



Slide notes

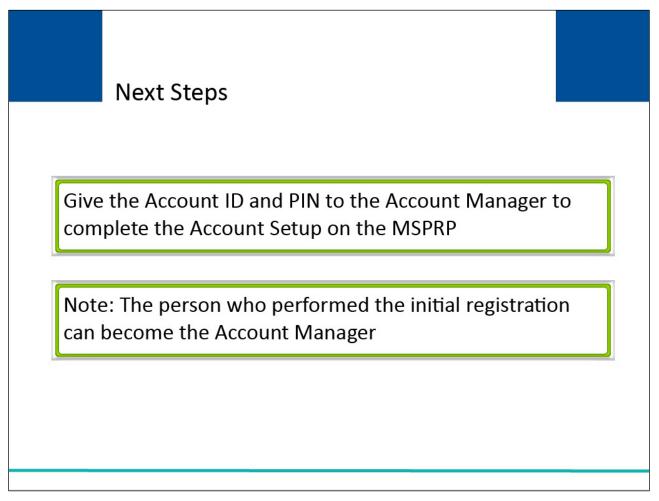
The information submitted in the New Registration step will be vetted by the Electronic Data Interchange (EDI) Department to ensure it is valid and complete.

Within seven business days, an email will be sent to the email address submitted on the Representative Information page during the New Registration.

This email will include the PIN and instructions for the next step in the registration process - Account Setup.

If this email is not received within seven business days, contact an EDI Representative by phone at (646) 458-6740 or email at COBVA@bcrcgdit.com.

Slide 17 of 24 - Next Steps



Slide notes

The Account ID and PIN must be given to the Account Manager for the representative account to use to complete the Account Setup.

Note: The person who performed the initial registration can become the Account Manager for the account.

Slide 18 of 24 - Account Manager and Account Designee

Account Manager and Account Designee

Account Manager (only) actions

- Complete Account Setup
- Administer the MSPRP account
- Invite other users (Account Designees)
- Have the option to assign the Account Manager role to another person
- Access to view Open Debt Reports

Account Manager and Account Designee actions (as applicable to the case)

- Submit authorization documentation
- · Request conditional payment letter
- Dispute claims
- Submitting and verifying case settlement information
- Initiate the demand letter
- Make an electronic payment

Slide notes

In addition to completing Account Setup, the Account Manager is responsible for administering the account on the MSPRP and inviting others to assist as Account Designees. Account Managers also have access to view Open Debt reports.

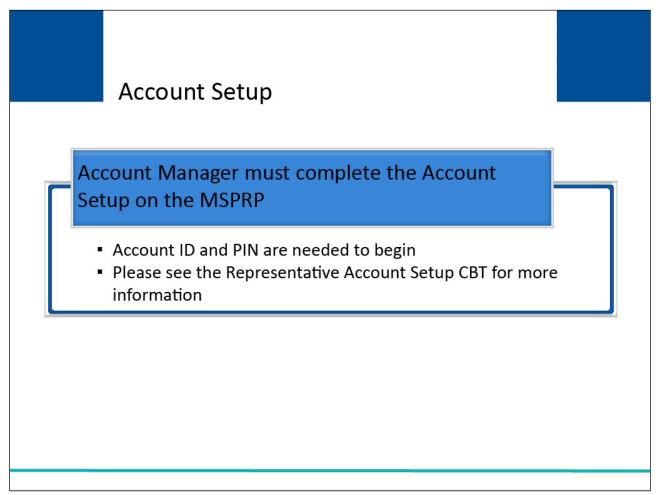
Both the Account Manager and the Account Designee can perform case recovery tasks, such as:

- Submitting authorization documentation
- Requesting a conditional payment letter
- Disputing claims
- Submitting and verifying case settlement information
- Initiating the demand letter
- Make an electronic payment

Note: Only those actions that are applicable to the case will be available.

Account representatives can register as an Account Representative for other MSPRP corporate accounts or register as an Account Manager or Account Designee for other MSPRP accounts.

Slide 19 of 24 - Account Setup



Slide notes

The Account Manager must return to the MSPRP to complete the Account Setup. The Account Manager will need to enter the Account ID and PIN on the main page to begin setup.

For more information on the Account Setup process, please see the Representative Account Setup CBT.

Slide 20 of 24 - Profile Report

		eport	0		2				-
Continent	MS	Medicare	261	condar	y Payer	Kec	covery Porta		R
					very Portal le Report				
Account ID:31304					nt Type Representativ	2		Date: Month Da	te Year
EDI Centact Morn Email	ation .AAAAABAAAA.AAA.					Phone.			
Representative:									
Name: Address	AAAA.					Phone			
	AAAA.		.AA	-					
Email	AAAA@AAA.AAA								
Account Hanager	1. AAAA								
Name: Address:	AAAA.					Phone.	*****		
Email	AAAA AAAA&BAAA AAA		.AA	88944					
Account ID:31304				Accou	nt Type Representativ			Date Month Dat	or Year
EDI Centect Inform Email	AAAA@AAA.AAA				Phone				
SAFEGUARDING 8	LIMITING ACCESS TO DA	ТА							
belof, and I authora processing. Proper 1366, Section 187 establish appropriat authorated represen- with the secanty re- require access to 1	re-CMS to verify this informs safeguards shall include the [b] of the Social Security A e administrative, technical statives of the CMS shall be pairements apecified above perform their official cluties ethicsed of (1) the confidentia	PRP representative account definition. Lagree to exist all this and price definition and price definition and price definition of price definition of the second se	plennent ures to a on 1862) ands to p anged di urans of	proper safeguard ensure that the da (b) of the Social S sociect the confide Accleare data are luning the MSP Ro (the information; r	s against unauthorized ta obtained shall be un ecurity Act (A2 U.S.C. mitality of the data and loopt for the purpose of covery process shall b 2) respond to authorize	use and and solely 7 1390yi to prever imapecto e reatrict ad law en	I disclosure of the data for the p y in accordance with Section 11 (p)(), and the Privacy Act of 13P/ in unauthorized access to the d ing security arrangements and o ted to CMS, CDMS, and MSPR Monomment (investigations, or (3))	upposes of MSPRP propo till of the Social Security I, as amended (o U.S.C. antiprovided by the CMS, continuing whether the up- personnel, and other as respond to any required (sal(s) review and Act [42:U.S.C. 7 7 552a] Users shall You agree that the ris in compliance thorized users who egal process. Such
Signature of Account	ri Manager								

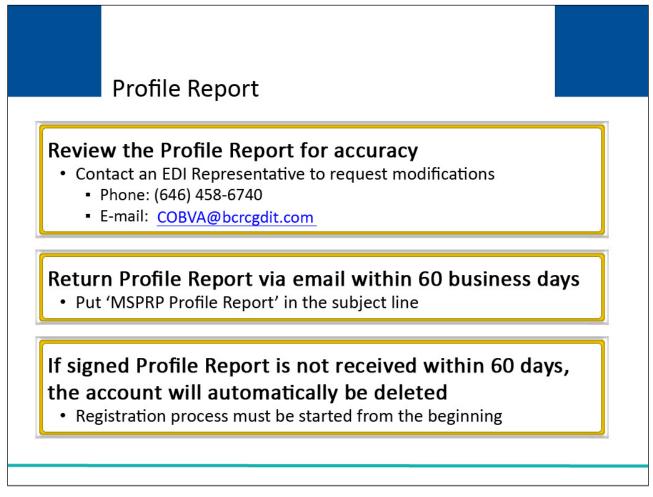
Slide notes

Once the Account Manager has completed the account setup, an email notification will be sent to them.

This notification will include a Profile Report that contains information regarding the representative for the account and associated contact information as well as a Data Use Agreement.

It may take up to 10 business days to receive the Profile Report. A sample Profile Report is shown on the slide.

Slide 21 of 24 - Profile Report



Slide notes

The Account Manager must review the Profile Report for accuracy.

If information on the Profile Report is inaccurate or requires modifications, please contact an EDI Representative by phone at (646) 458-6740 or email at COBVA@bcrcgdit.com.

The Account Manager will have 60 business days to review, sign, and return the Profile Report to the Medicare - EDI Department. When returning the signed Profile Report via email, put 'MSPRP Profile Report' in the subject line.

If a signed Profile Report is not received within that timeframe, the account will be automatically deleted on the 60th business day.

If the account is deleted, the registration process must be started from the beginning.

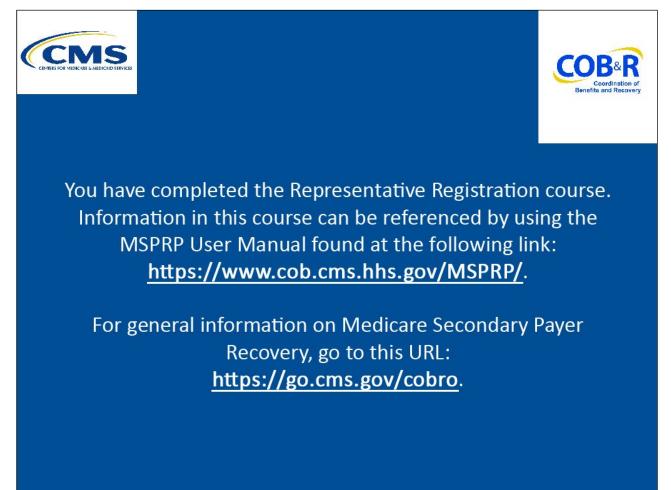
Slide 22 of 24 - Course Summary



Slide notes

This course provided instruction on how to complete a New Registration on the MSPRP for a representative account type and the steps that must be followed once the registration has been submitted.

Slide 23 of 24 - Conclusion



Slide notes

You have completed the Representative Registration course. Information in this course can be referenced by using the MSPRP User Manual found at the following link: <u>CMS MSPRP Website</u>.

For general information on Medicare Secondary Payer Recovery, go to this URL: <u>CMS COB&R Overview</u>.

Slide 24 of 24 - MSPRP Training Survey



Slide notes

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