Commercial Repayment Center Portal (CRCP)

User Guide

Version 1.7

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Confidentiality and Disclosures

Confidentiality and Disclosure of Information Section 1106 (a) of the Social Security Act as it applies to the Centers for Medicare & Medicaid Services (CMS) - (42 CFR Chapter IV Part 401 §§ 401.101 to 401.152) prohibits disclosure of any information obtained at any time by officers and employees of Medicare Intermediaries, Carriers, or contractors in the course of carrying out agreements under Sections 1816 and 1842 of the Social Security Act, and any other information subject to Section 1106 (a) of the Social Security Act. Section 1106 (a) of the Act provides in pertinent part that "Any person who shall violate any provision of this section shall be deemed guilty of a felony and, upon conviction thereof, shall be punished by a fine not exceeding $10,000, or by imprisonment not exceeding five year, or both." Additional and more severe penalties are provided under Title XVIII (Medicare) USC Section 285 (unauthorized taking or using of papers relating to claims) and under Section 1877 of Title XVIII of the Act (relating to fraud, kickbacks, bribes, etc., under Medicare).

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Chapter 1: Summary of Version 1.7 Updates

The following represents changes to the Commercial Repayment Center Portal (CRCP) User Guide, v1.7:

For consistency, several screens were updated to display corrected format changes made in July, 2016. Changes throughout.

Chapter 2: Introduction

2.1 Overview of the CRCP

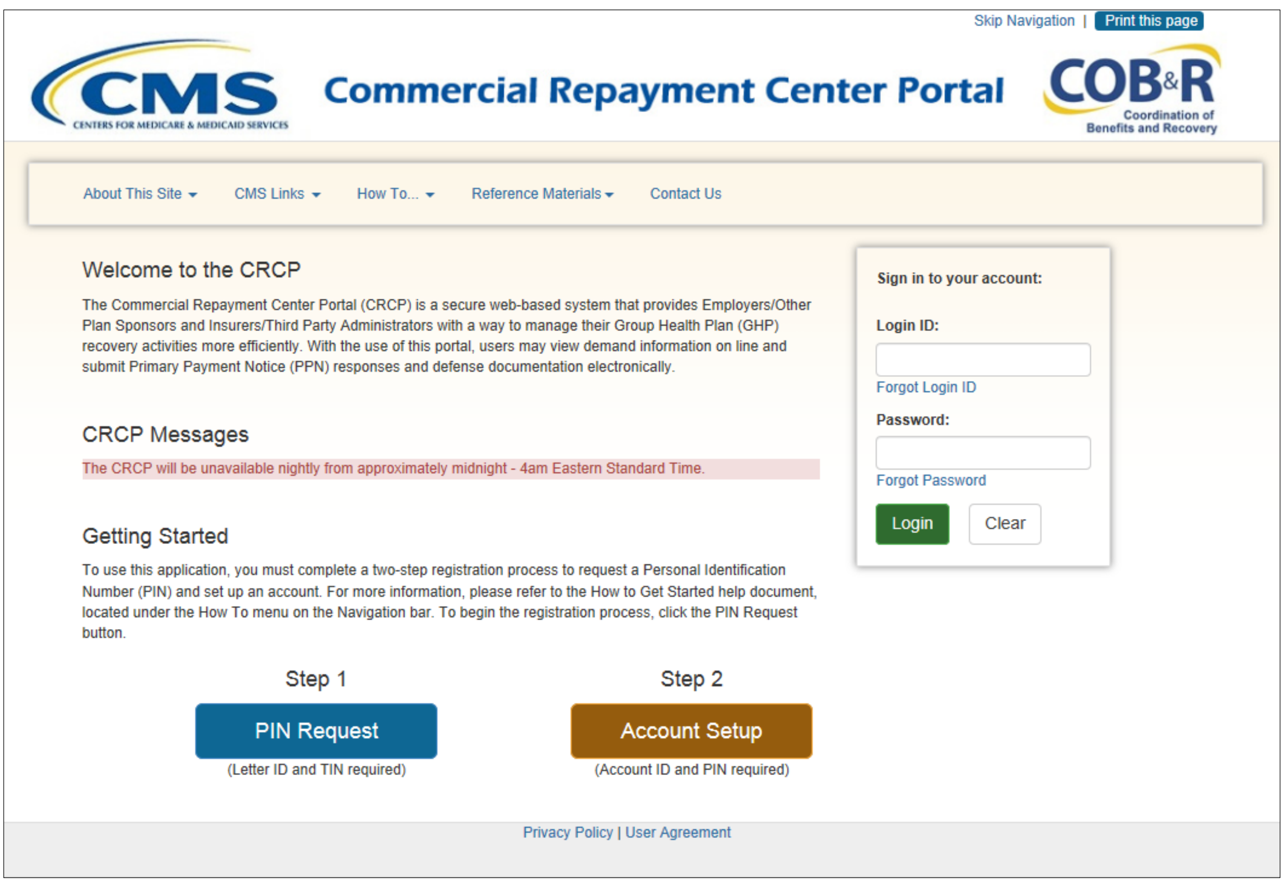
The Commercial Repayment Center Portal (CRCP) is a secure web-based system that provides employers, other plan sponsors, insurers, and Third-Party Administrators (TPAs) with a way to manage their Group Health Plan (GHP) recovery activities and cases online. Specifically, CRCP users can electronically communicate with the Commercial Repayment Center (CRC) to resolve their GHP debt with Medicare.

This system provides the ability for users to perform the following actions:

- View Primary Payment Notice (PPN) information and submit a PPN response (by either uploading a file or by direct data entry).
- View demand and related case information.
- Submit documented defenses for selected beneficiaries.
- View and track case information, including financial data, defense status, and correspondence history.

  Note: The CRC will continue to support the manual submission of PPN responses and documented defense documentation. The CRCP serves to augment that process.

Figure 2-1: Welcome to the CRCP Page



2.2 Account Types

Before you begin the process of creating a new account, you must determine your account type. There are two account types available for CRCP users: Employer or Insurer. Account types are mutually exclusive and require registration on the CRCP.

- Employer: The Employer account is intended for employers or other plan sponsors.
- Insurer: The Insurer account is intended for insurers or other claims processing Third Party Administrators (TPAs).

2.3 Login ID and Password Limits

Each user of the CRCP can have only one Login ID and Password. Unless previously registered, you must begin at the *Welcome to the CRCP* page to register for a CRCP account.

> **Note:** Invited Account Designees following the registration link bypass the *Welcome to the CRCP* page during registration.

2.3.1 Coordination of Benefits Secure Web Site (COBSW) Application Users

Users of other COBSW applications (Medicare Secondary Payer Recovery Portal (MSPRP), Section 111 COBSW, and Workers' Compensation Medicare Set-Aside Arrangement Portal (WCMSAP)) must use the same Login ID and Password for each application. If you already have a Login ID and Password for these applications, you will not be allowed to create new credentials on the CRCP. Additionally, if you change your password in any COBSW application, it is changed for all other COBSW applications, including the CRCP.

> **Note**: *Login ID* and *Password* fields are case sensitive.

2.4 Users and Roles

A CRCP user can be defined as one of three possible roles:

- Authorized Representative (AR)
- Account Manager (AM)
- Account Designee (AD)

A CRCP AR, AM, or AD may have another role (AR, AM, or AD) in the other COBSW systems.

2.4.1 Authorized Representative (AR) Role

The Authorized Representative (AR) is the person in your organization (employer/other plan sponsor or insurer/TPA) who has the legal authority to bind the organization to a contract and to the terms of CRCP requirements. This is usually a senior executive or partner of your company or firm. The AR has ultimate accountability for the information submitted on the CRCP.

The AR initiates the registration process (or designates another to do so) by requesting a Personal Identification Number (PIN), but the AR does not have direct access to the CRCP application and cannot be a user on the portal.

On completing the *PIN Request* process, the AR will receive a letter by mail containing a 4-digit numeric PIN and an Account ID. The AR then provides the PIN, Account ID, and company contact information to the designated Account Manager (AM), who will finish the process of setting up the account on the CRCP. Once the AM completes the *Account Setup* process, a Profile Report is e-mailed to the AR. The AR is responsible for returning the signed Profile Report to the Benefits Coordination and Recovery Center (BCRC).

2.4.1.1 AR Responsibilities

The AR is responsible for the following activities of the CRCP:

- Completing the *PIN Request* process.
- Providing the designated AM with the PIN, Account ID, and company contact information.
- Reviewing, approving, and physically signing the Profile Report, including the Data Use Agreement (DUA), and returning it to the EDI Representative.

2.4.1.2 AR User Restrictions

The AR must comply with the following CRCP user restrictions:

- A CRCP AR may not be a user (AM or AD) of the CRCP application, but can be the AR for multiple CRCP accounts.

2.4.2 Account Manager (AM) Role

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

Once the AR completes the *PIN Request* process and provides the AM with the PIN, Account ID, and company contact information, the designated AM will complete the *Account Setup* process. Once the *Account Setup* process is finished, a Profile Report is e-mailed to the AR for review and approval. The AM is copied on the e-mail,

Once the account is set up, the AM can begin inviting ADs to the account. However, until the signed Profile Report has been returned and processed by the EDI Representative, the AM cannot access the full CRCP functionality, such as viewing or submitting PPNs or documented defense information. Once the EDI Representative has activated the account, the AM will have full functional access to the CRCP to begin working cases.

2.4.2.1 AM Responsibilities

The AM is responsible for the following activities in the CRCP:

- Completing the *Account Setup* process.
- Inviting or adding ADs to an account.
- Revoking or removing AD access to an account.
- Updating personal contact information.
- Updating AR contact information.
- Replacing the AR, if necessary.

2.4.2.2 AM Role Restrictions

The AM must comply with the following CRCP user role restrictions:

- The AM cannot be the AR for any CRCP account.
- An AM may be the AM for multiple CRCP accounts.
- An AM can be an AM for one account and an AD for another account.
- The AM can replace the AR for their account with an existing AR from a different account.
- An AM cannot update organizational account information (Company Tax Identification Number (TIN), Company Name, Address, etc.). The AM must contact the CRC to make any of these changes.
- A user cannot be both an AM and an AD for the same account.

2.4.3 Account Designee (AD) Role

An Account Designee (AD) assists the AM with GHP recovery cases. The AM may, but is not required to, invite individuals to register as ADs associated with the account and become users of the CRCP. Each CRCP account may have zero, one, or up to 100 ADs.

An AD must first be invited by an AM. If the AD has never registered for a COBSW application before, the AD must create a Login ID and Password to gain access to the account on the CRCP. An AD who is already registered with a CRCP account, or who is already a user on another COBSW application, can use their current credentials to log into the CRCP. Once an AM has invited an AD, the system sends an e-mail to the AD with instructions on how to register (new users only) and access the account.

ADs can be associated to multiple CRCP accounts using their single Login ID. After logging in, ADs are presented with a list of accounts to which they are associated. ADs can then select an account and choose from a number of actions available for managing that account, such as viewing or submitting PPNs, viewing demands and case information, and submitting defense documentation.

If you want an AD to be reassigned as an AM to an existing account, contact your EDI Representative to make the change.

2.4.3.1 AD Responsibilities

The AD is responsible for the following activities in the CRCP:

- Registering on the CRCP at the invitation of the AM.
- Obtaining a Login ID and Password (for new application users only).
- Updating personal contact information.
- Viewing and managing recovery cases.

2.4.3.2 AD Role Restrictions

The AD must comply with the following CRCP user role restrictions:

- The AD cannot be an AR for any CRCP account.
- The AD can be an AM for a different CRCP account.
- The AD cannot be both AM and AD for the same CRCP account.
- The AD can be reassigned as the AM for the same account.
- The AD cannot invite other users to be an AD for a CRCP account.

- The AD cannot update CRCP organizational account information (Company TIN, Company Name, Address, etc.).

2.5 Finding Help

When you arrive at the CRCP, you will find several helpful resources. Most are located on the main navigation bar of the application:

- User Guide
- How To Menu
- Quick Help
- Entry Hints

2.5.1 User Guide

This user guide, located under the *Reference Materials* menu on the CRCP, includes general information about the CRCP system and provides specific process steps on how to use the CRCP navigation and portal screens. The information in this guide may be used in conjunction with other online help documents, which will help with completing common tasks.

You can access this user guide and all help pages at the following CRCP URL: https://cob.cms.hhs.gov/CRCP

2.5.2 How To… Menu

On the main navigation bar (Section 6.2), you will find a **How To…** menu that provides links to brief instructions on completing the following common tasks:

- How to Get Started
- How to Request your Login ID
- How to Request your Password
- How to Change your Password
- How to Reset your PIN
- How to Change your Authorized Representative
- How to Change your Account Manager
- How to Invite and Remove Account Designees

Click the **How To** link, and then click any of the topic links to open the corresponding instructions.

2.5.3 Quick Help

On each CRCP web page, you will find a **Quick Help** link that, when clicked, opens a help document in a separate browser window. The document explains the specific web page and the actions you may take on it. The **Quick Help** documents provide steps and explanations of fields, menus, and other information for the selected page.

2.5.4 Entry Hints

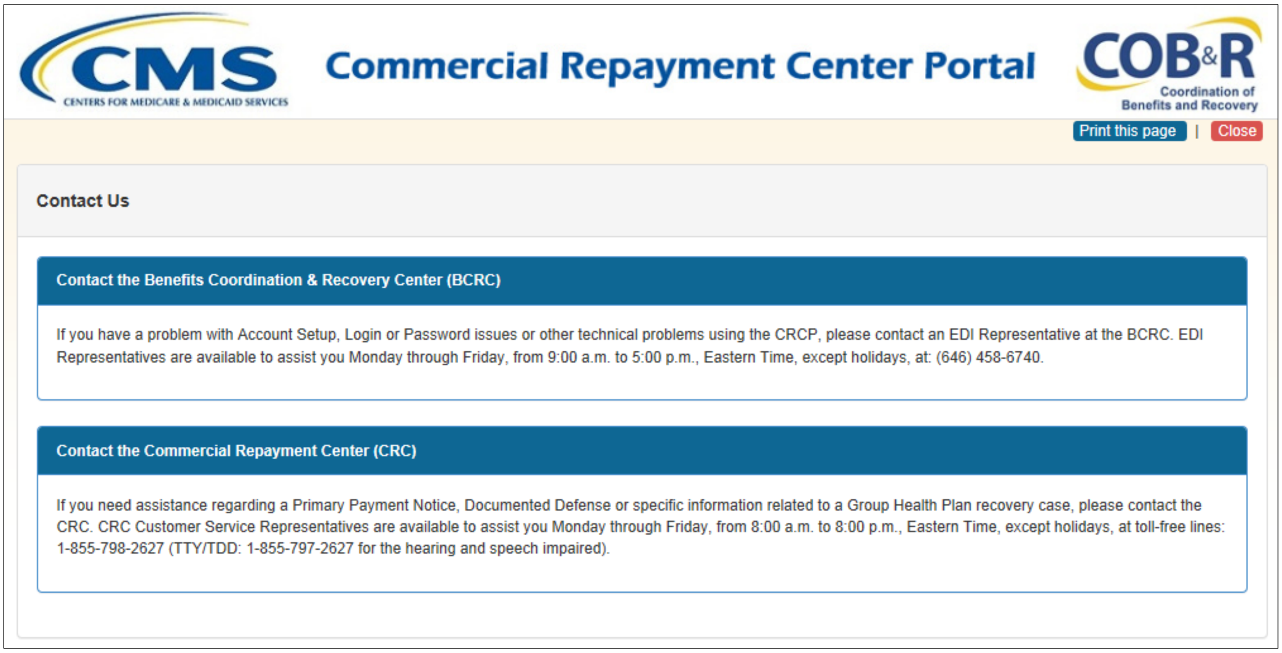
On certain pages, there are one or more **Entry Hint** or **Search Hint** links. Clicking one of these links displays a pop-up window that provides additional details about completing fields or conducting a search. Field details include requirements, constraints, and other general guidelines.

2.5.5 Help Contact Information

The following describes general contact information for different issues. For information regarding how to respond to common error messages, see Chapter 12.

When you click the **Contact Us** hyperlink from the navigation bar, you are taken to the *Contact Us* page.

Figure 2-2: Contact Us Page



2.5.5.1 Account Setup, Login, Password, or Other Account Issues

Users of the CRCP may need assistance with managing an account or managing their personal information within the application. If you have a problem with your account setup, login, or password, or are experiencing other technical problems using the CRCP, please contact an EDI Representative at the Benefits Coordination & Recovery Center (BCRC).

EDI Representatives are available to assist you Monday through Friday, from 9:00 a.m. to 5:00 p.m., Eastern Time, except holidays, at: (646) 458-6740. Or contact them by e-mail at COBVA@GHIMedicare.com.

Contact an EDI Representative When:

- Your Account Manager has any questions or problems regarding your account at any time during account setup.
- The Profile Report is not received within 10 business days after completing the *Account Setup* process.
- You incorrectly entered your PIN or Account ID three times and the account was automatically locked.
- You forgot your Login ID or Password and cannot remember the answers to your security questions.
- You are unable to log in due to your account being in "Inactive" Status.

- Incorrect company information is displayed or associated with your account during the PIN Request step.
- Discrepancies regarding activity history appear on the *Account Activity* page.
- You need to remove access to a letter associated to an Account ID.
- You need to change the AM for an Account ID. (The AR for the account is responsible for making this contact.)

2.5.5.2 PPNs, Demands, Documented Defenses, or GHP Case Issues

Users of the CRCP may need assistance regarding the PIN Request process, a PPN, Demand, Documented Defense, or specific information related to a GHP recovery case. If you need assistance with these topics, or if you have not received your PIN letter within 10-12 business days of completing the PIN Request, please contact the CRC.

CRC Customer Service Representatives are available to assist you Monday through Friday, from 8:00 a.m. to 8:00 p.m., Eastern Time, except holidays, at toll-free lines: 1-855-798-2627 or TTY/TDD: 1-855-797-2627 for the hearing and speech impaired.

Chapter 3: Accessing the CRCP

3.1 Login Warning and Data Use Agreement

Before accessing the CRCP, all users must read the *Login Warning* page and accept the Data Use Agreement (DUA) The login warning and DUA outline requirements, expectations, and guidelines for the use of the CRCP system. Understanding the login warning and acceptance of the DUA is a pre-requisite for using the CRCP system.

After acceptance of the agreement, the *Welcome to the CRCP* page is the first page displayed for the CRCP. The *Welcome to the CRCP* page is the starting point for requesting a PIN, setting up an account, and logging into the CRCP using your Login ID and Password.

Accepting the DUA

1. If you accept the DUA and choose to proceed to the *Welcome to the CRCP* page, click **I Accept**.
2. If you do NOT accept the DUA and choose to exit the CRCP system without accessing the *Welcome to the CRCP* page, click **Decline**.

Figure 3-1: Login Warning Page

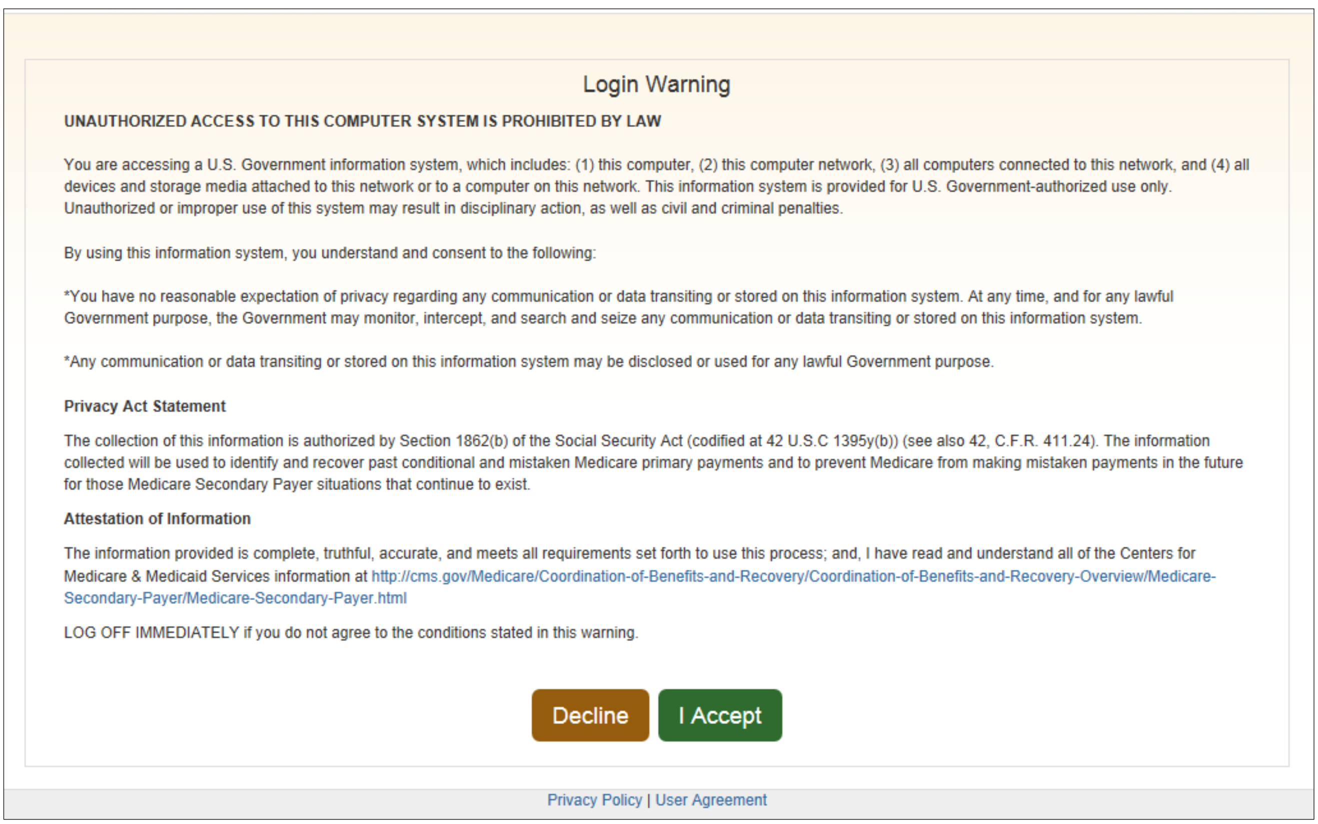


Table 3-1: Login Warning Page Fields

Field	Description
Print this page	A link in the upper right side of the page that will print the *Login Warning* page when it is clicked.
Decline	This button indicates you do not agree with the terms of the Login Warning and re-displays the *Login Warning* page.
I Accept	This button indicates you agree with the terms of the Login Warning and displays the *Welcome to the CRCP* page.

The *Login Warning* page appears every time you access the CRCP. It must be accepted each and every time you access or log in to the system.

> **Note:** For the remainder of this user guide, it is assumed that you have read, understood, and accepted the login warning and DUA, and have clicked **I Accept**. All instructions given in the remainder of this guide will omit this step and begin at the *Welcome to the CRCP* page.

3.2 Welcome to the CRCP Page

The *Welcome to the CRCP* page is the first page that appears after accepting the DUA. This page is the "starting point" for using the CRCP. From this page, you can:

- Request a PIN (see Section 4.2)
- Set up an account (see Section 4.3)
- Log into an existing account (Section 5.1)
- Access the CRCP navigation bar (Section 6.2)
- Retrieve a Forgotten Login ID (Section5.1.2.1)
- Retrieve a Forgotten Password (Section 5.1.2.2)

The *Welcome to the CRCP* page (Figure 3-2) also displays messages from the CRCP, such as downtime notices, system updates, etc.

Figure 3-2: Welcome to the CRCP Page

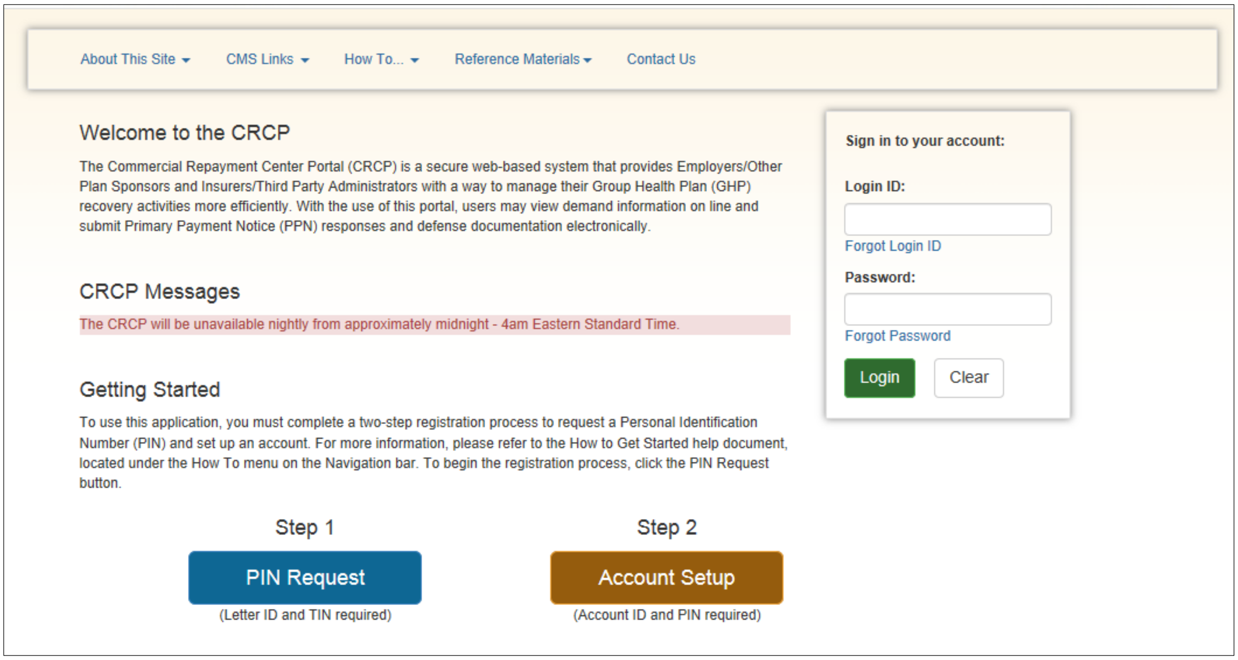


Table 3-2: Welcome to the CRCP Page Fields

Field	Description
Login ID	Enter your login ID in the field.
Password	Enter your password in this field.
Forgot Login ID	Link that enables a user to retrieve a forgotten Login ID.
Login	This button logs you in, and displays the *Account Listing* page.
Forgot Password	Link that enables a user to retrieve a forgotten Password.
Clear	This button deletes all text entered in the *Login ID* and *Password* fields.
PIN Request	This button begins the PIN request process, and displays the *Personal Identification Number (PIN) Request* page.
Account Setup	This button begins the account setup process, and displays the *Account Setup Introduction* page.

Chapter 4: Registering for the CRCP

4.1 Introduction

This chapter describes the prerequisites and steps for registering for the CRCP. Registration is a two-step process: requesting a PIN and setting up an account. Each step must be completed by an individual with a different role in your organization.

It is critical that you provide accurate information during the registration process. Documents available on the CRCP under the **How To** and the **Quick Help** links provide detailed information to assist you.

Once you have started a step, you must complete it without interruption. If you click the **Cancel** button or close the application at any point before completing the step, your changes will not be saved and all entered data will be lost. You must then begin the process again from the beginning.

Note: Gather all of the information you will need before beginning the registration step (Section 4.1.2).

4.1.1 PIN Request and Account Setup Requirements

Before starting the *PIN Request* or *Account Setup* processes on the CRCP, you must select individuals from your organization to fill the following roles:

- Authorized Representative (AR): Completes the *PIN Request* process.
- Account Manager (AM): Completes the *Account Setup* process.

See Section 2.3 for a detailed description of these roles, the responsibilities, and user restrictions.

4.1.2 Prerequisites for Registration

To complete the registration process, you will need the following company and letter information:

PIN Request

- Letter ID from a Demand, Defense, or PPN letter issued from the CRC
- One of the following pieces of information as it appears on the letter (depending on the letter type selected):
  - For a Demand Letter: the Total Debt Due
  - For a Defense Letter: the Case ID
  - For PPN Letter: the PPN Response Due Date

  Note: You can use a PPN Letter in which the PPN Response Due Date has already passed.
- Company Tax Identification Number (TIN)

  Note: You must provide a TIN when registering and creating an account. TIN entries that do not match an actual company in the CRCP will result in errors. Contact the CRC in the event you do not have a TIN available. See Section 2.5.5 for information on contacting the CRC.
- Company account type (either employer or insurer)

- Company name and address (to confirm and verify)
- AR's official contact information (name, job title, address, e-mail address, phone number, etc.)

Account Setup

- Account ID
- PIN
- The AM's official contact information (name, address, e-mail address, phone number, etc.)
- Company name and address (to confirm and verify)

4.2 PIN Request

Requesting a PIN is the first step in the CRCP registration process. This step must be completed by the individual who will be the designated AR for your organization, or by someone working on behalf of the AR.

4.2.1 Summary of PIN Request Tasks

During the PIN Request process, you (the AR) will complete the following tasks:

- Request a PIN.
- Enter contact information for the AR.
- Review and verify your PIN request and AR information.
- Submit the PIN request.

4.2.2 PIN Request Steps

Note: All fields marked with an asterisk (*) are required.

1. From the *Welcome to the CRCP* page, click **Step 1: PIN Request**.

   The *Personal Identification Number (PIN) Request* page appears (Figure 4-1).

2. From the drop-down list, select the company Account type for which you are registering.
3. Enter the Company Tax Identification Number (TIN).
4. In the next two fields, enter (and re-enter) the Letter ID for the letter you are using to request a PIN.
5. Using the available radio buttons, select the type of letter you plan to use for the PIN Request and enter the specific, required information for that letter.

   See the "RE:" ("Regarding") section of these letters to identify the key information you will need for the request. Click the **Entry Hint** link for additional information about completing the fields.

6. Click **Continue** to proceed to the *Authorized Representative (AR) Information* page (Figure 4-2), or click **Cancel** to proceed to the *Cancel Confirmation* page.

   From the *Cancel Confirmation* page, click **Cancel** to redisplay the *Personal Identification Number (PIN) Request* page with all information intact; or click **Continue** to return to the *Welcome to the CRCP* page with no information saved.

7. On the *Authorized Representative (AR) Information* page, enter the required contact information of the AR.

8. Click **Continue** to save the AR contact information and proceed to the *PIN Request Summary* page (Figure 4-3), or click **Cancel** to proceed to the *Cancel Confirmation* page.

   From the *Cancel Confirmation* page, click **Cancel** to redisplay the *Authorized Representative (AR) Information* page with all information intact; or click **Continue** to return to the *Welcome to the CRCP* page with no information saved.

9. On the *PIN Request Summary* page, verify that your information is correct before continuing.

   To make changes to either the *Personal Identification Number (PIN) Request* or the *Authorized Representative Information* pages, click **Edit** in the *PIN Request* or *AR Information* sections.

   Make any necessary edits; then click **Continue** to navigate back to the *PIN Request Summary* page.

10. To submit your data, click **Continue** and continue to the *PIN Request Thank You* page (Figure 4-4), or click **Cancel** to proceed to the *Cancel Confirmation* page.

    From the *Cancel Confirmation* page, click **Cancel** to redisplay the *PIN Request Summary* page with all information intact; or click **Continue** to return to the *Welcome to the CRCP* page with no information saved.

After the PIN Request step is completed, a letter containing the Account ID and PIN is sent to the AR at the address listed on the letter used to initiate the PIN Request. The *Thank You* page displays the assigned Account ID for the new account.

The letter containing the PIN should arrive within 10–12 business days. If it does not arrive within that time, please contact the Commercial Repayment Center (CRC) for assistance at: (855) 798-2627.

After receiving the Account ID and PIN (by mail), you must give this information, and company contact information, to the designated Account Manager (AM) for your company. The AM will complete the *Account Setup* process (see Section 4.3).

To begin the *Account Setup* process, the AM must go to the *Welcome to the CRCP* page at https://cob.cms.hhs.gov/CRCP and click the **Step 2 – Account Setup** button.

Notes:

After three unsuccessful attempts to enter your PIN Request information in a single browsing session, you will be instructed to contact the CRC. The *Contact the Commercial Repayment Center (CRC)* page will appear with instructions.

Additionally, you will be instructed to contact the CRC if the information you entered is already matched to an existing CRCP account, if the TIN you entered cannot be matched to a TIN on file, or if there are other discrepancies in the information entered on the *Personal Identification Number (PIN) Request* page.

See Section 2.5.5 for information on contacting the CRC.

Figure 4-1: PIN Request Page

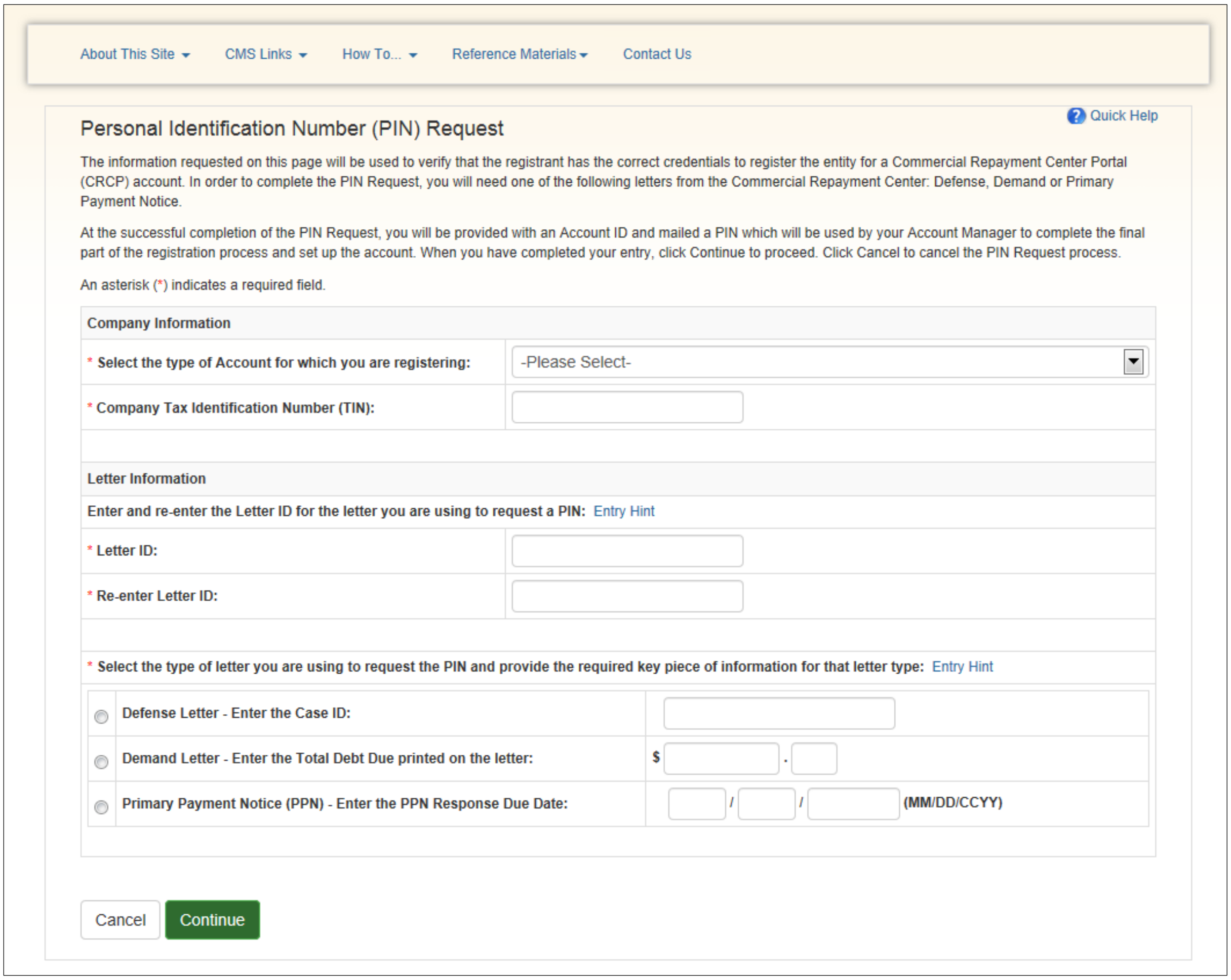


Table 4-1: Personal Identification Number (PIN) Request Fields

Field	Description
Company Information	-
Select the type of Account for which you are registering	Displays the user account types in a drop-down menu. Select from: • **Employer**- Applies to Employers and Other Plan Sponsors • **Insurer** – Applies to Insurers and Claims Processing Third Party Administrators (TPAs)
Company Tax Identification Number (TIN)	Enter the TIN for your organization. This field is a 9-digit numeric field.
Letter Information	-
Letter ID	Enter the Letter ID. The Letter ID can be found in the upper left corner on Defense, Demand, or PPN letters in the “Regarding” section. This field always begins with an “86.” Click the **Entry Hint** link for additional information.

Field	Description
Re-Enter Letter ID	Re-enter the Letter ID from the previous field for verification.
Defense Letter	Enter the Case ID. This field is a 17-character, alpha-numeric field. If the Case ID begins with a "C" followed by a dash, include these characters when you key in the Case ID. No other special characters are allowed.
Demand Letter	Enter the Total Debt Due. You may enter dollars up to 9 digits (do not enter commas); include cents. Enter this amount exactly as it appears on your letter. Enter "00" in the cents field if there are no cents.
Primary Payment Notice (PPN) Letter	Enter the PPN Response Due Date, using two digits for the month, two digits for the day, and four digits for the year. The date must be valid and must be less than or equal to the current date + 45 calendar days. Spaces and letters are not allowed.
Cancel	This button deletes all entered information, cancels the *PIN Request* process, and returns you to the *Welcome to the CRCP* page.
Continue	This button authenticates the information you entered, saves the information in the system, and takes you to the *Authorized Representative (AR) Information* page.

Figure 4-2: Authorized Representative (AR) Information Page

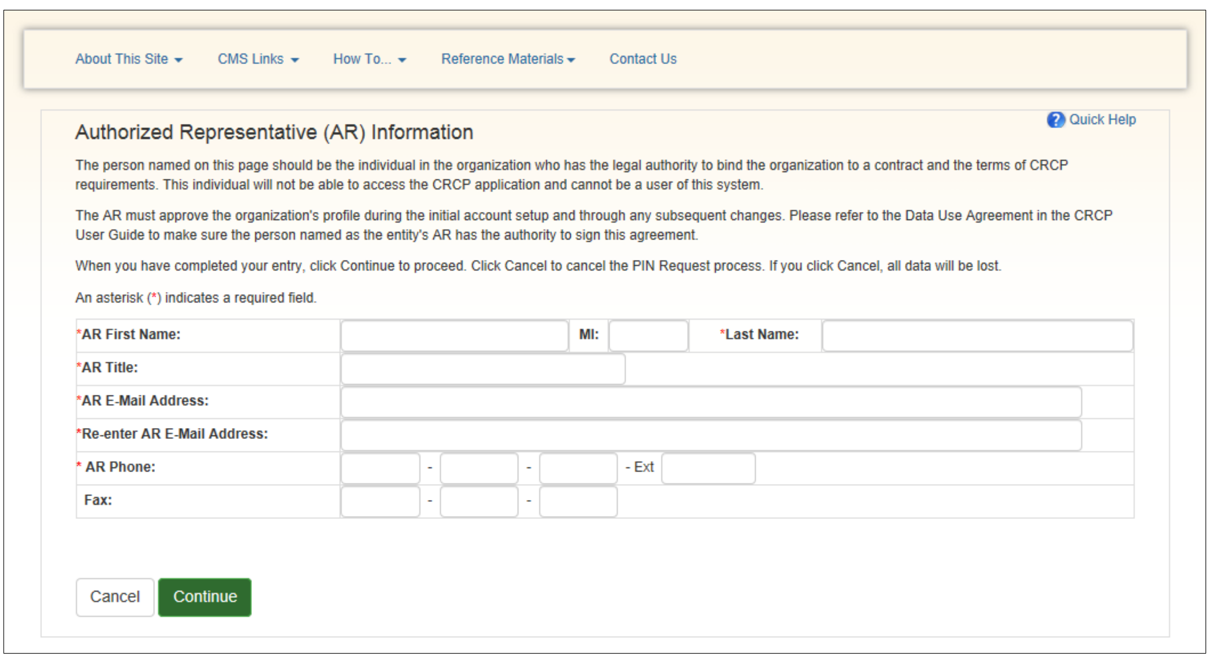


Table 4-2: Authorized Representative (AR) Information Page Fields

Field	Description
AR First Name	Enter the full first name of the AR for the account. This field is alphabetic and can only contain letters, spaces, hyphens (-), and apostrophes (‘). You can enter up to 15 characters.
MI	Enter the middle initial of the AR. You can enter only one letter. This field is optional.
Last Name	Enter the last name of the AR for the account. This field is alphabetic and can only contain letters, hyphens (-), and apostrophes (‘). You can enter up to 24 characters.
AR Title	Enter the title of the AR for this account. This field is alphabetic and can only contain letters.
AR E-Mail Address	Enter the AR contact e-mail address, not an e-mail for the organization or a distribution list. This field must contain an @ sign followed by a valid extension (i.e., .org, .com, .net, etc.)
Re-enter AR E-Mail Address	Re-enter the e-mail address from the previous field. This must exactly match the information entered in the *AR E-Mail Address* field.
AR Phone + Ext.	Enter the full 10-digit phone number (with the area code) plus an optional extension. The *AR Phone* field is numeric with no spaces.
Fax	Enter the full 10-digit fax number (with the area code). This field is optional.
Cancel	This button deletes all entered information, cancels the PIN request process, and returns you to the *Welcome to the CRCP* page.
Continue	This button validates the entered information, saves it in the system, and takes you to the *PIN Request Summary* page.

Figure 4-3: PIN Request Summary Page

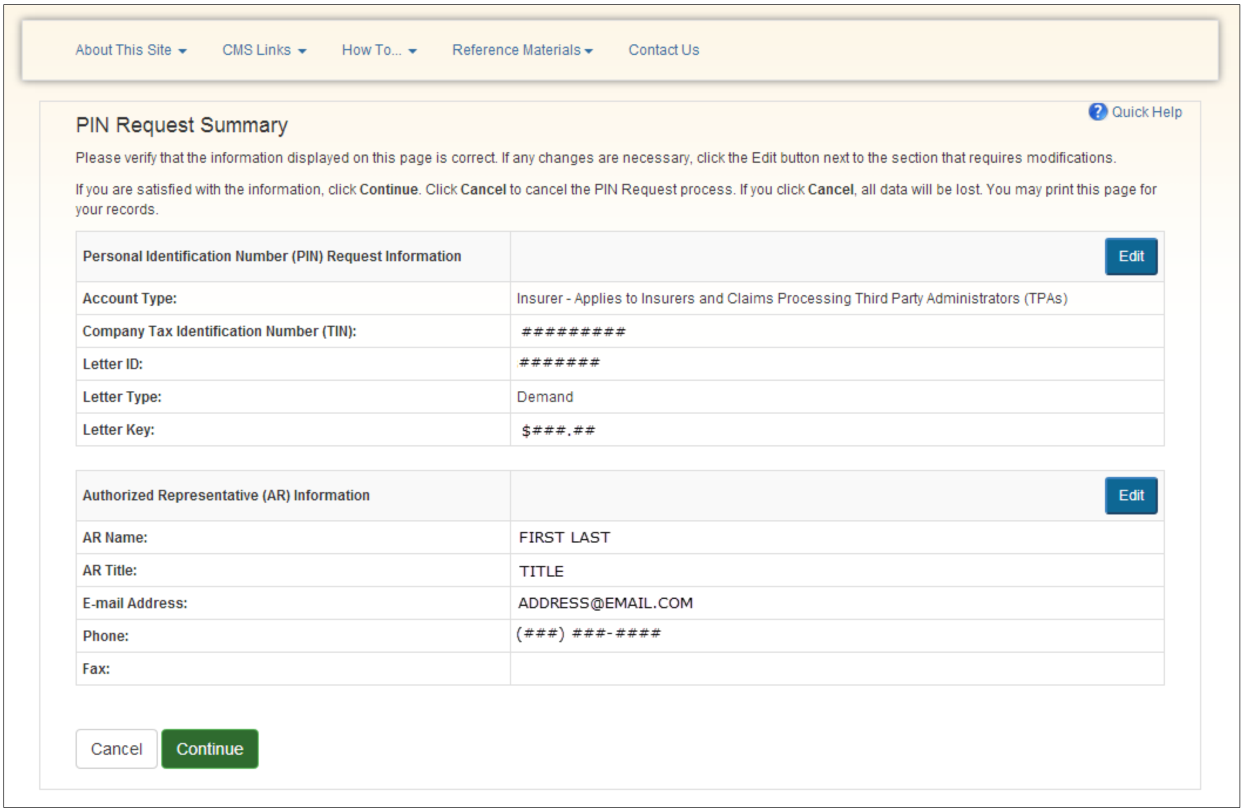


Table 4-3: PIN Request Summary Page Fields

Field	Description
Personal Identification Number (PIN) Request Information	-
Edit	This button transfers you to the *Personal Identification Number (PIN) Request* page, where you can edit any previously entered data.
Authorized Representative (AR) Information	-
Edit	This button transfers you to the *Authorized Representative (AR) Information* page, where you can edit any previously entered data.
Cancel	This button deletes all entered information, cancels the PIN request process, and returns you to the *Welcome to the CRCP* page.
Continue	This button saves the entered information in the system, and takes you to the *PIN Request Thank You* page.

Figure 4-4: PIN Request Completed Successfully Thank You Page

4.3 Account Setup

Setting up an account is the second, and final, step in the CRCP registration process. This step must be completed by the individual who will be the designated AM for your account.

Before starting, you should have the Account ID and PIN provided by your AR. You should also have the company's account type, TIN, and company name and be able to verify your AR's first and last name, title, e-mail address, phone, and fax number.

4.3.1 Summary of Account Setup Tasks

During Account Setup, you (the AM) will complete the following tasks:

- Enter the PIN, Account ID, and your e-mail address. The e-mail address is used by the system to determine if you already have a Login ID for a COBSW application.
- Verify the current company information and AR contact information.
- Enter your personal contact information.
- Create a Login ID and Password (for new COBSW application users only).
- Review and verify your Login ID (if applicable) and personal contact information.
- Submit the data.

4.3.2 Account Setup Steps

Note: All fields with an asterisk (*) are required.

1. From the *Welcome to the CRCP* page, click **Step 2: Account Setup**.

   The *Account Setup Introduction* page appears (Figure 4-5).

2. Review the information on the *Account Setup Introduction* page, and then click **Continue** to proceed with the process. (If you click **Cancel**, the *Welcome to the CRCP* page appears.)

   The *Account Setup* page appears (Figure 4-6).

3. In the *Account ID* field, enter the Account ID.

4. In the *Personal Identification Number (PIN)* field, enter the PIN.

   The CRCP will lock the PIN after three unsuccessful attempts to enter a matching Account ID and PIN combination with valid data entries. If you have problems with your Account ID or

PIN; please contact an EDI Representative. See Section 2.5.5.1 for information on contacting an EDI Representative.

5. Enter (and re-enter) the *Account Manager E-Mail Address*.

   Your e-mail is required to verify whether or not you already have a Login ID on another COBSW application and that you are not an AR for any account in the CRCP.

   If you are already a user on a COBSW application, you will not be prompted to create a new Login ID and Password for the CRCP. You will use your current COBSW credentials to log into the CRCP.

6. Click **Previous** to return to the *Account Setup Introduction* page (deleting any information you entered on the *Account Setup* page), or click **Continue** to save the information you entered here and proceed to the *Account Setup – Company Information* page (Figure 4-7), or click **Cancel** to display the *Cancel Confirmation* page.

   From the *Cancel Confirmation* page, click **Cancel** to redisplay the *Account Setup* page with all information intact, or click **Continue** to navigate to the *Welcome to the CRCP* page with no information saved.

Verify Company and AR Information

7. Verify the company and AR information on the *Account Setup – Company Information* page.

   If correct, click **Continue** to save the information you entered and proceed to the *Account Manager Personal Information* page (Figure 4-8), or click **Previous** to return to the *Account Setup* page without saving the information you entered on the current page.

   If incorrect, the *Account Setup* process cannot be completed at this time. Click **Cancel** to display the *Cancel Confirmation* page.

   From the *Cancel Confirmation* page, click **Continue** to exit the *Account Setup* process and return to the *Welcome to the CRCP* page.

Complete Personal Information

8. Complete the fields on the *Account Manager Personal Information* page.

   Note: Step 8 will only need to be completed if you are not an existing COBSW user.

9. To continue with the *Account Setup* process, read and accept the User Agreement and Privacy Policy.

   a. To view the User Agreement and Privacy Policy, click **View and print the User Agreement and Privacy Policy**.
   b. Select the **I Accept the User Agreement and Privacy Policy** checkbox to accept the agreement and policy.

10. Click **Continue** to save this information and continue to the next step, or click **Previous** to return to the *Account Setup – Company Information* page without saving the information you entered on the current page, or click **Cancel** to display the *Cancel Confirmation* page.

    From the *Cancel Confirmation* page, click **Cancel** to redisplay the *Account Manager Personal Information* page with all information intact, or click **Continue** to exit the *Account Setup* process and return to the *Welcome to the CRCP* page with no information saved.

Next Steps

If you are a new user who has never registered for a COBSW application, the *Account Manager Login Information* page (Figure 4-9) will display when you click **Continue** on the *Account Setup – Company Information* page; continue with Step 11.

If you are an existing user, the *Account Manager Setup Completed. Thank You* page (Figure 4-11) will display when you click **Continue** on the *Account Setup – Company Information* page. After you complete the *Account Setup* process, a Profile Report is e-mailed to the AR for the account, and copied to you, the AM. The AR must sign and return the Profile Report to complete the *Account Setup* process. See Section 4.4.

New COBSW Users: Create Login ID and Password

11. On the *Account Manager Login Information* page, read the login and password format requirements before proceeding.
12. Enter a *Login ID* (must be 7 characters in the format of two letters, three numbers, then two letters, as in AA999AA).

    See the Login ID requirements in Table 4-8.
13. Enter (and re-enter) a *Password.*

    See the password requirements in Table 4-8.

Select Security Questions and Answers

You cannot select the same security question for both questions 1 and 2.

14. Select *Security Question 1* from the drop-down menu.
15. Enter an *Answer* to *Security Question 1*.
16. Repeat Steps 14 and 15 for *Security Question 2*.
17. Click **Continue** to continue to the *Account Manager Summary Information* page (Figure 4-10); click **Previous** to return to the *Account Manager Personal Information* page without saving any information you entered on the *Account Manager Login Information* page; or click **Cancel** to display the *Cancel Confirmation* page.

    From the *Cancel Confirmation* page, click **Cancel** to redisplay the *Account Manager Login Information* page or click **Continue** to exit the *Account Setup* process and return to the *Welcome to the CRCP* page.

Verify Login and Contact Information

18. On the *Account Manager Summary Information* page, verify that your information is correct before continuing.
    a. To make changes to either the *Account Manager Personal Information* or *Account Manager Login Information* pages, click **Edit** in the *Personal Information* or *Login Information* sections.
    b. Make any necessary edits; then click **Continue** to navigate back to the *Account Manager Summary Information* page, showing the edited information.
19. Click **Continue** to submit the data and continue to the *Account Manager Setup Completed. Thank You* page (Figure 4-11), or click **Cancel** to proceed to the *Cancel Confirmation* page.

From the *Cancel Confirmation* page, click **Cancel** to redisplay the *Account Manager Summary Information* page with all information intact; or click **Continue** to exit the *Account Setup* process and return to the *Welcome to the CRCP* page**.**

After the AM completes the *Account Setup* process, a Profile Report is e-mailed to the AR for the account, and copied to the AM. The AR must sign and return the Profile Report to complete the *Account Setup* process. See Section 4.4.

Figure 4-5: Account Setup Introduction Page

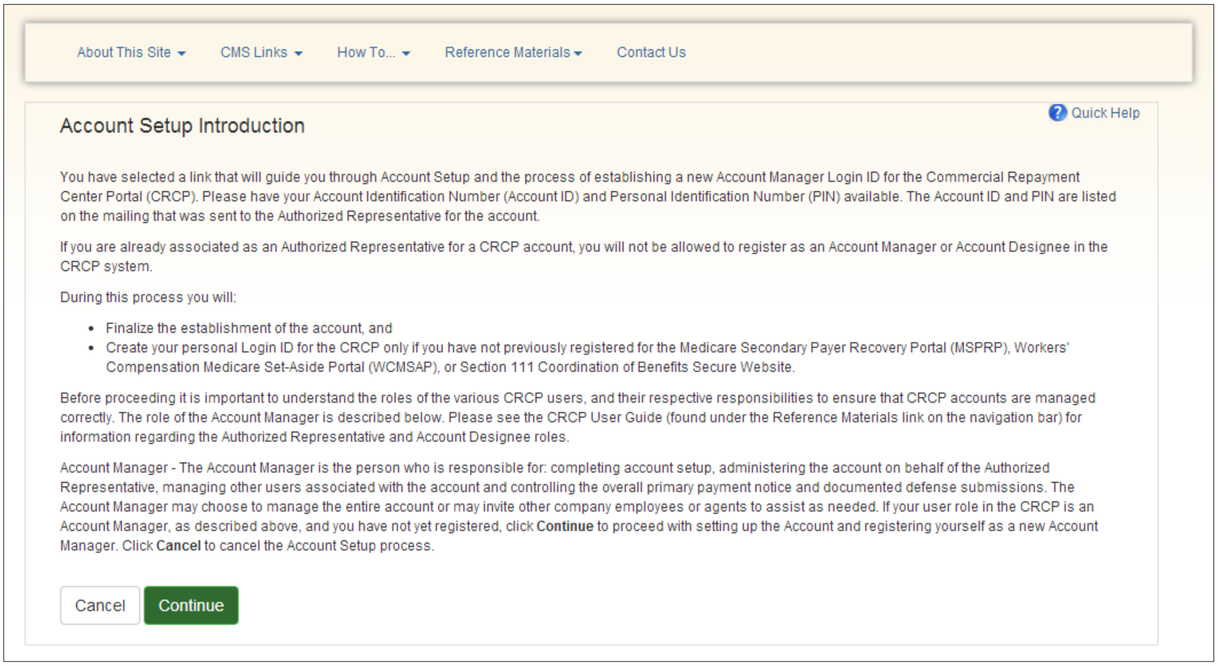


Table 4-4: Account Setup Introduction Page Fields

Field	Description
Cancel	This button exits the *Account Setup Introduction* page and displays the *Welcome to the CRCP* page.
Continue	This button continues the Account Setup process and displays the *Account Setup* page.

Figure 4-6: Account Setup Page

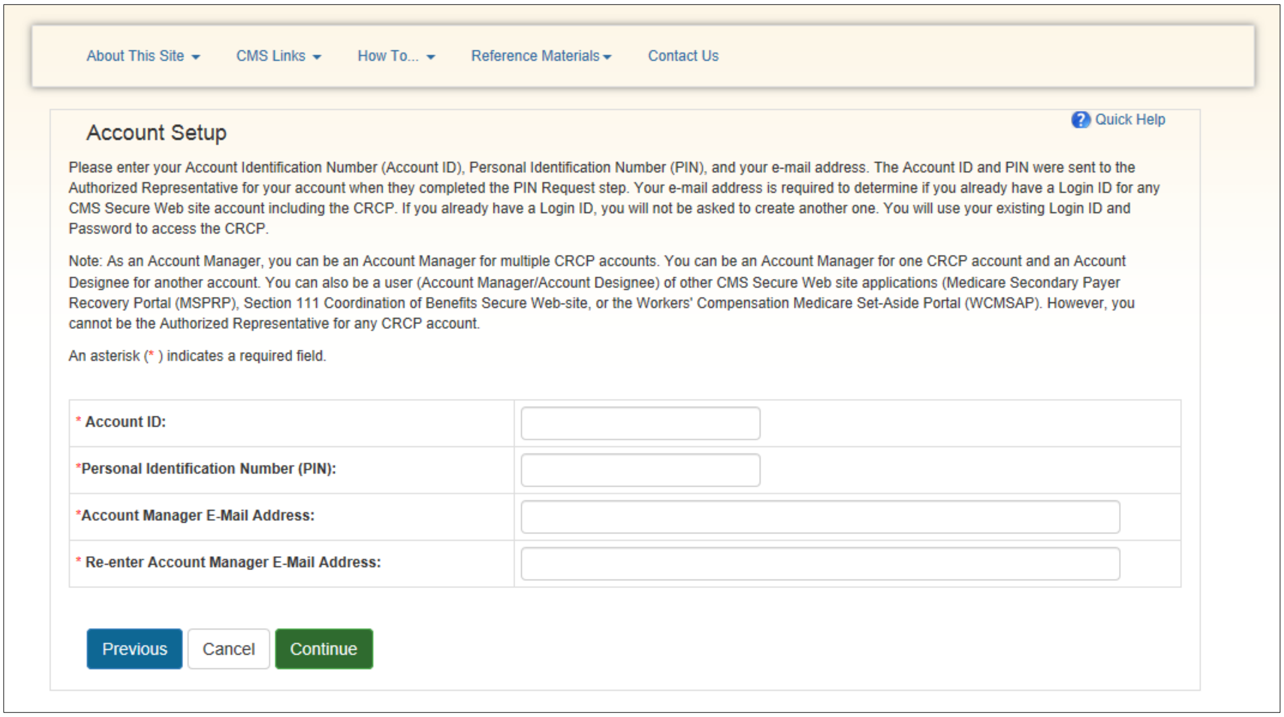


Table 4-5: Account Setup Page Fields

Field	Description
Account ID	Enter the Account ID (provided by your AR). This field must be numeric and cannot contain any spaces, letters, or special characters.
Personal Identification Number (PIN)	Enter the PIN (provided by your AR). The PIN is a 4-digit number.
Account Manager E-Mail Address	The e-mail address of the individual that will be the Account Manager (AM) for this account must: • Be a valid e-mail address. • Be accessible to the AM. • Not be the same e-mail address as a registered AR in the CRCP. • Not be associated with an account that is in Inactive or Locked status.
Re-enter Account Manager E-Mail Address	The re-entered e-mail address must match that entered in the previous field.
Previous	This button returns you to the *Account Setup Introduction* page without saving any information entered on this page.
Cancel	This button deletes all entered information, cancels the *Account Setup* process, and returns you to the *Welcome to the CRCP* page.
Continue	This button saves the entered information in the system, and takes you to the *Account Setup – Company Information* page.

Figure 4-7: Account Setup – Company Information Page

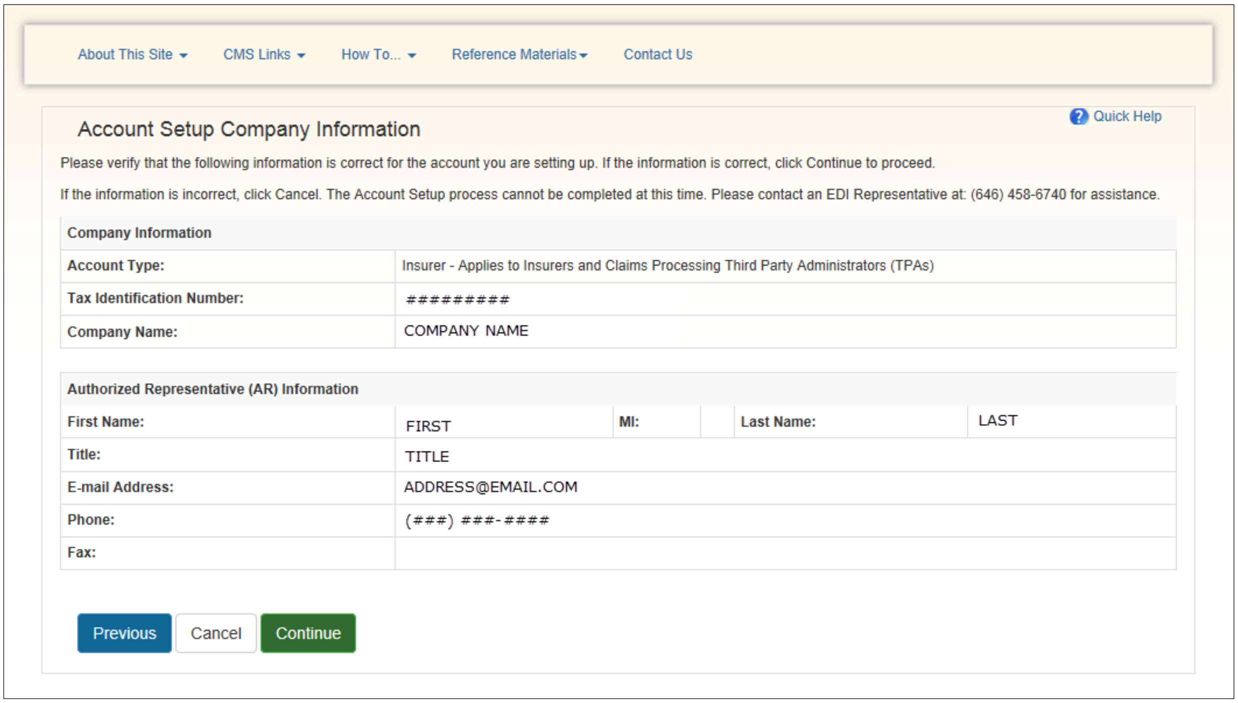


Table 4-6: Account Setup Company Information Page Fields

Field	Description
Company Information	-
Account Type	Displays the type of Account associated with the Account ID.
Tax identification Number (TIN)	Displays the TIN on file associated with the Account ID.
Company Name	Displays the name of the company associated with the Account ID.
Authorized Representative (AR) Information	-
First Name	Displays the full first name of the AR for the account.
MI	Displays the middle initial of the AR for the account. This field is optional.
Last Name	Displays the last name of the AR for the account.
Title	Displays the title of the AR for the account.
E-mail Address	Displays the AR contact e-mail address.
Phone + Ext.	Displays the full 10-digit phone number (with the area code) plus an optional extension.
Fax	Displays the full 10-digit fax number (with the area code). This field is optional.
Previous	This button displays the *Account Setup* page without saving the information you entered on the current page.
Cancel	This button cancels the Account Setup process and deletes any information entered.

Field	Description
Continue	This button saves the entered information and displays the *Account Manager Personal Information* page.

Figure 4-8: Account Manager Personal Information Page

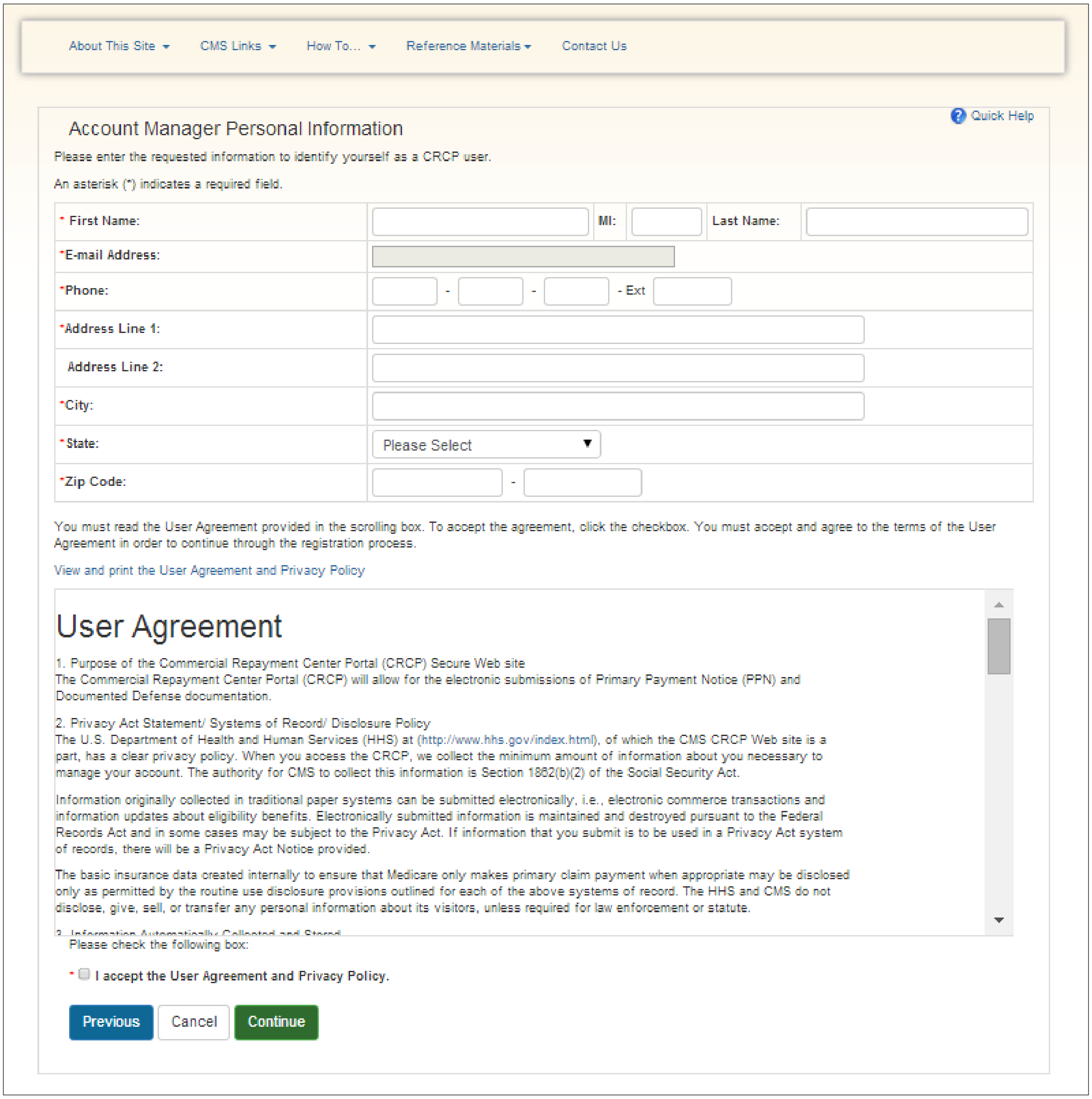
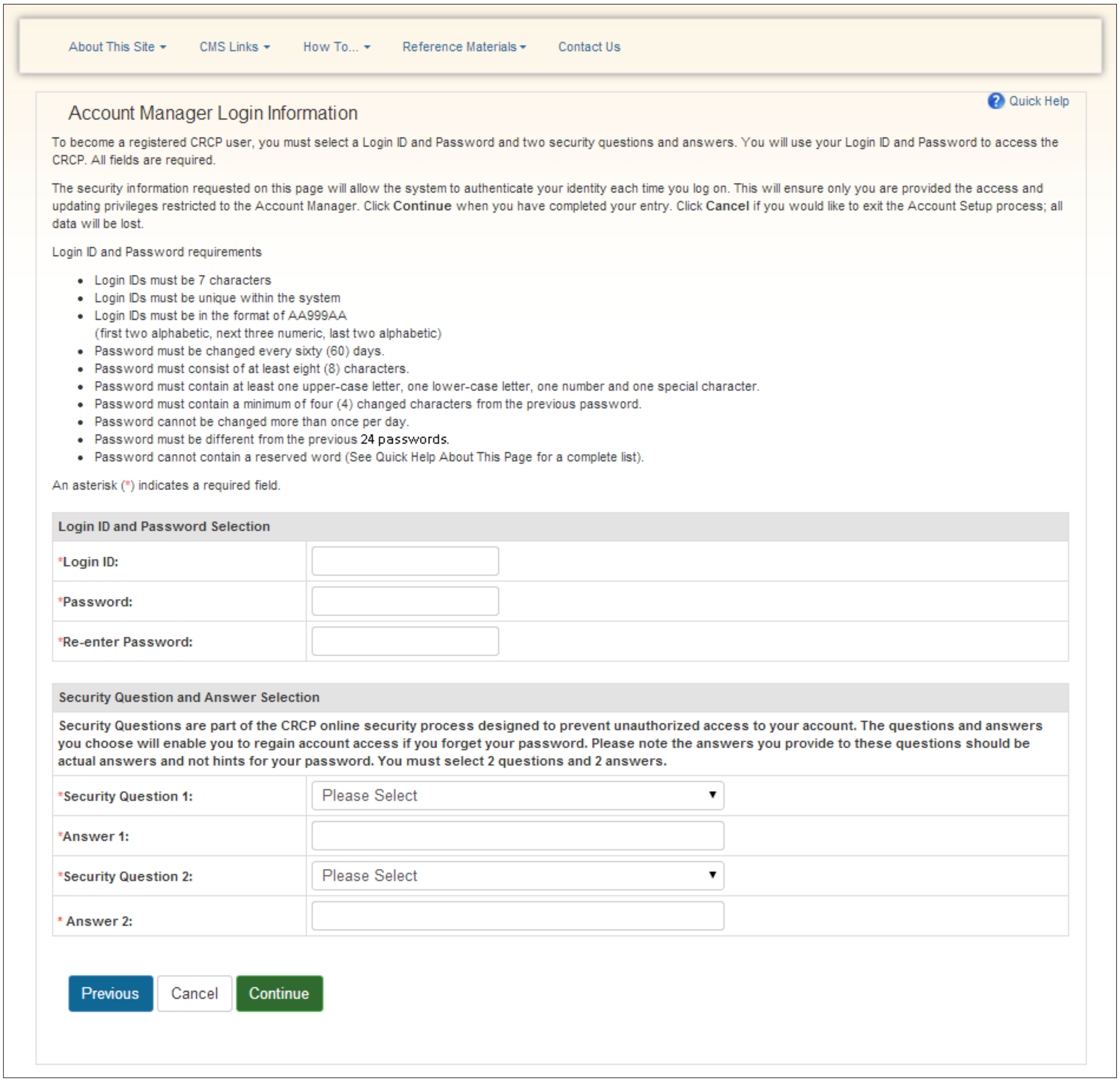


Table 4-7: Account Manager Personal Information Page Fields

Field	Description
First Name	Enter the First Name of the AM. This field is alphabetic can only contain letters, hyphens (-), and apostrophes (‘). You can enter up to 15 characters.
MI	Enter the middle initial of the AM. You can enter only one letter. This field is optional.
Last Name	Enter the Last Name of the AM. This field is alphabetic and can only contain letters, hyphens (-), and apostrophes (‘). You can enter up to 24 characters.
E-mail Address	This is a read-only field that is pre-filled from the information entered on the *Account Setup* page.
Phone + Ext.	Enter the full 10-digit phone number (3-digit Area Code, 3-digit Exchange, and 4-digit Suffix) plus an extension for the AM. The phone number is numeric with no spaces. The extension is optional.
Address Line 1	Enter the address of the AM. You can enter up to 32 characters in this field. The address field must contain, at a minimum, at least two characters with 1 number and 1 letter.
Address Line 2	Enter additional address information for the AM. You can enter up to 32 characters in this field. This is an optional field.
City	Enter a city for the AM. This field can only contain letters, spaces, apostrophes, periods, hyphens, and colons.
State	Select a state from the drop-down menu.
Zip Code	Enter the 5-character Zip code and Zip+4. These fields are numeric. It cannot contain letters, spaces, or special characters. The Zip+4 field is optional.
User Agreement and Privacy Policy (Checkbox)	Click this checkbox to indicate your acceptance of the User Agreement and Privacy Policy.
Previous	This button returns you to the *Account Setup* page without saving any data you entered on this page.
Cancel	This button deletes all entered information, cancels the *Account Setup* process, and returns you to the *Welcome to the CRCP* page.
Continue	This button saves the entered information in the system. • If the AM is **not** an existing user in a COBSW application, this button takes you to the *Account Manager Login Information* page. • If the AM is an existing user in a COBSW application, this button takes you to the *Account Manager Setup Completed Thank You* page.

Figure 4-9: Account Manager Login Information Page



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Quick Help

Account Manager Login Information

To become a registered CRCP user, you must select a Login ID and Password and two security questions and answers. You will use your Login ID and Password to access the CRCP. All fields are required.

The security information requested on this page will allow the system to authenticate your identity each time you log on. This will ensure only you are provided the access and updating privileges restricted to the Account Manager. Click **Continue** when you have completed your entry. Click **Cancel** if you would like to exit the Account Setup process; all data will be lost.

Login ID and Password requirements

- Login IDs must be 7 characters
- Login IDs must be unique within the system
- Login IDs must be in the format of AA999AA
  (first two alphabetic, next three numeric, last two alphabetic)
- Password must be changed every sixty (60) days.
- Password must consist of at least eight (8) characters.
- Password must contain at least one upper-case letter, one lower-case letter, one number and one special character.
- Password must contain a minimum of four (4) changed characters from the previous password.
- Password cannot be changed more than once per day.
- Password must be different from the previous 24 passwords.
- Password cannot contain a reserved word (See Quick Help About This Page for a complete list).

An asterisk (*) indicates a required field.

Login ID and Password Selection	
*Login ID:	
*Password:	
*Re-enter Password:	

Security Question and Answer Selection	
Security Questions are part of the CRCP online security process designed to prevent unauthorized access to your account. The questions and answers you choose will enable you to regain account access if you forget your password. Please note the answers you provide to these questions should be actual answers and not hints for your password. You must select 2 questions and 2 answers.	
*Security Question 1:	Please Select
*Answer 1:	
*Security Question 2:	Please Select
* Answer 2:	

Previous Cancel Continue

Table 4-8: Account Manager Login Information Page Fields

Field	Description
Login ID	Enter a Login ID. Login IDs must be: • Seven (7) characters • Unique within the system • In the format AA999AA (two letters, three numbers, then two letters).
Password	Enter a password. Passwords must: • Be changed every sixty (60) days. • Consist of at least eight (8) characters. • Contain at least one upper-case letter, one lower-case letter, one number, and one special character. • Contain a minimum of four (4) changed characters from the previous password. • Not be changed more than once per day. • Be different from the previous twenty-four (24) passwords. • Not contain a reserved word from the following list:

Field	Description
(Reserved Words)	PASSWORD, WELCOME, HCFA, CMS, SYSTEM, MEDICARE, MEDICAID, TEMP, LETMEIN, GOD, SEX, MONEY, QUEST, 1234, RAVENS, REDSKIN, ORIOLES, BULLETS, CAPITOL, MARYLAND, TERPS, DOCTOR, 567890, 12345678, ROOT, BOSSMAN, JANUARY, FEBRUARY, MARCH, APRIL, MAY, JUNE, JULY, AUGUST, SEPTEMBER, OCTOBER, NOVEMBER, DECEMBER, SSA, FIREWALL, CITIC, ADMIN, UNISYS, PWD, SECURITY, 76543210, 43210, 098765, IRAQ, OIS, TMG, INTERNET, INTRANET, EXTRANET, ATT, LOCKHEED, BENEFICIARY, COBC, DATAMATCH, EMPLOYER, INSURER, MANDATORY, MSPRP, ORF20ASYA, REPORTING, RETIREE, SECURITY, SSA, LOCKH33D, SOCIAL, FACEBOOK, YOUTUBE, WINDOWS, STEELERS, PATRIOTS, COMPUTER, DILBERT, MONDAY, TUESDAY, WEDNESDAY, THURSDAY, FRIDAY, SATURDAY, SUNDAY, SPRING, SUMMER, AUTUMN, FALL, WINTER, BACKUP, BUSINESS, FALCONS, BRONCOS, EAGLES, PANTHERS, DOLPHINS, JAGUARS, CHIEFS, TEXANS, RAMS, BEARS, BROWNS, LIONS, BENGALS, COWBOYS, CARDINAL, CHARGERS, RAIDERS, SAINTS, REDSOX, YANKEES, PIRATES, PHILLIES, HHS, BRAVES, NATIONAL, UNITED, STATES, TWITTER, MITRE, MARLINS, OILERS, WHITESOX, CUBS, DODGERS, GIANTS, ANGELS, DEVILS, DIAMOND, SEATTLE, HOLLYWOOD, ARIZONA, ALABAMA, ALASKA, ARKANSAS, COLORADO, DELAWARE, FLORIDA, GEORGIA, HAWAII, IDAHO, ILLINOIS, INDIANA, IOWA, KANSAS, KENTUCKY, MAINE, MARYLAND, MICHIGAN, MISSOURI, MONTANA, NEBRASKA, NEVADA, LASVEGAS, NEWYORK, OHIO, OKLAHOMA, OREGON, UTAH, VERMONT, VIRGINIA, WYOMING, ATLANTIC, PACIFIC, SANFRAN, REGIONAL, MACS, EDC, BOSTON, ATLANTA, CMSNET, MDCN, TAMPA, MIAMI, STLOUIS, CHICAGO, DETROIT, DENVER, HOUSTON, DALLAS, INDIANS, TIGERS, ROYALS, BREWERS, TWINS, MARINERS, RANGERS, BLUEJAYS, ROCKIES, ASTROS, PADRES, LAPTOP, MODEM, DELL, SOLARIS, UNIX, LINUX, IBM, ROUTER, SWITCH, SERVER, STAFF, GOOGLE, YAHOO, VERIZON, ISSO, CISO, HACKER, PROGRAM, CYBER, DESKTOP, ENTER, EXIT, UNION, PIV, NETWORK, DROID, IPAD, IPHONE, DANGER, STARWAR, STARTREK, VULCAN, KLINGON, SPOCK, KIRK, CAPTAIN, XMEN, FLASH, FRINGE, JEDI, HOLIDAY, OUTLOOK, VETERAN, ARMY, NAVY, MARINE, AIRFORCE, MAINFRAME, CDS, HP, LHM, FLEX, SESAME, POLICY, HCPCS, DME, HOD, INTEL, VIPS, VPN, CISCO, APPLE, SECURE, DISNEY, VACATION, LEXMARK, LAKERS, THUNDER, JAZZ, MAVERICKS, PHOENIX, SPURS, CELTICS, HEAT, MAGIC, BULLS, HAWKS, HORNETS, NUGGETS, BLAZERS, GRIZZLIES, BOBCATS, WIZARDS, WARRIORS, KINGS, CLIPPERS, KNICKS, NETS, RAPTORS, 76ERS, ROCKETS, PISTONS, BUCKS, PACERS, CAVALIERS, SUNS, TIMBERWOLVES
Re-enter Password	Enter the same password from the *Password* field.
Security Question 1	Select *Security Question 1* from the drop-down menu.
Answer 1	Enter an *Answer* to *Security Question 1*. The answers you provide to the security questions should be actual answers and not hints for your password. Additionally, memorize your answers.
Security Question 2	Select *Security Question 2* from the drop-down menu. This must be a different selection than your first security question.
Answer 2	Enter an *Answer* to *Security Question 2*. The answers you provide to the security questions should be actual answers and not hints for your password. Additionally, memorize your answers.
Previous	This button returns you to the *Account Setup* page without saving any data you entered on this page.

Field	Description
Cancel	This button deletes all entered information, cancels the *Account Setup* process, and returns you to the *Welcome to the CRCP* page.
Continue	This button saves the entered information in the system and takes you to the *Account Manager Login Information* page.

Figure 4-10: Account Manager Summary Information Page

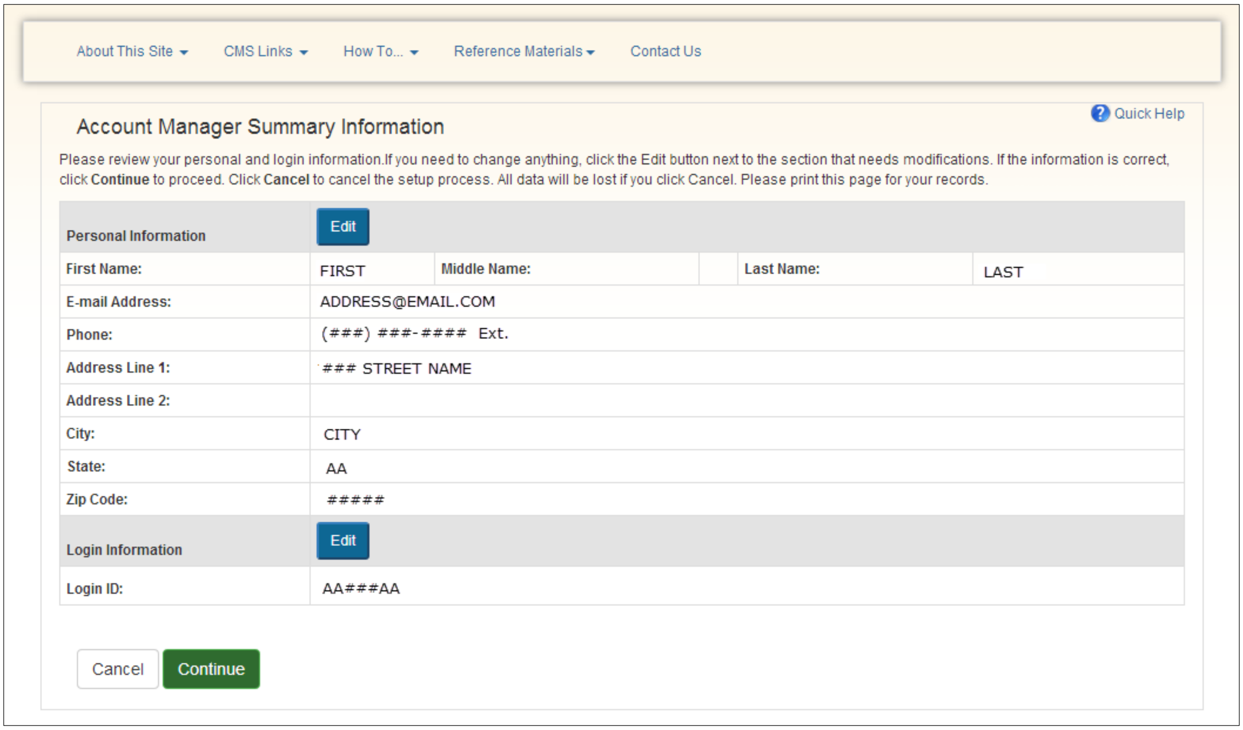
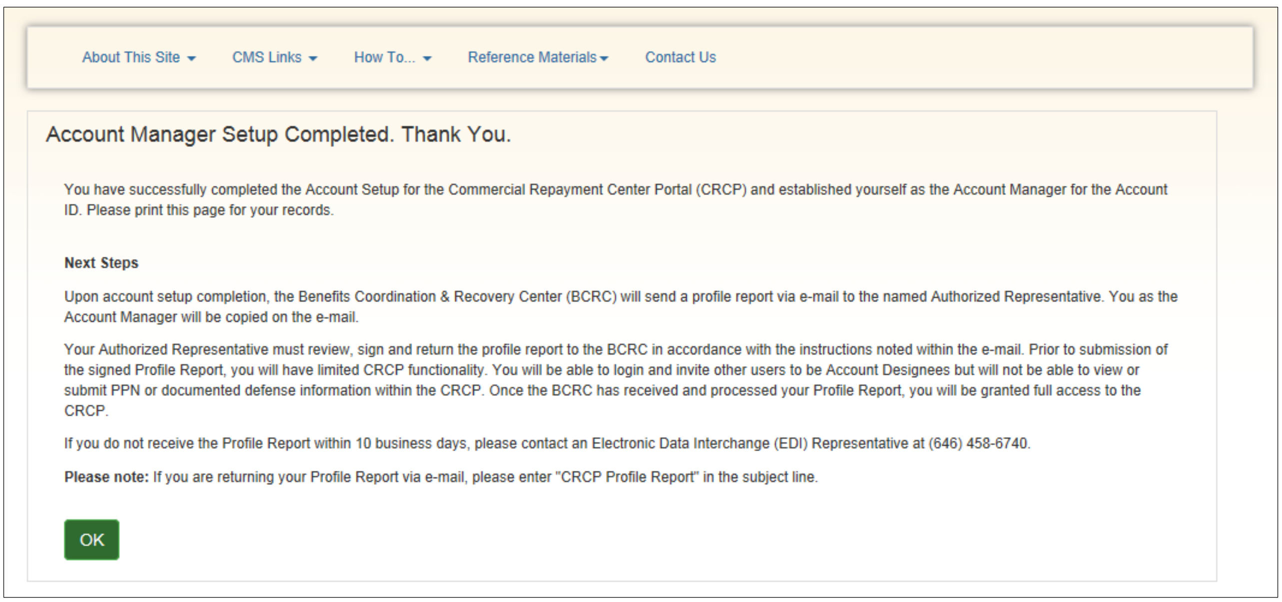


Table 4-9: Account Manager Summary Information Page Fields

Field	Description
Personal Information	-
Edit	This button transfers you to the *Account Manager Personal Information* page, on which you can edit all previously entered data (except the e-mail address).
Login Information	-
Edit	This button transfers you to the *Account Manager Login Information* page, on which you can edit all previously entered data.
Cancel	This button deletes all entered information, cancels the *Account Setup* process, and returns you to the *Welcome to the CRCP* page.
Continue	This button saves the data as presented and takes you to the *Account Manager Setup Completed Thank You* page.

Figure 4-11: Account Manager Setup Completed Thank You Page



4.4 Profile Report

To complete the *Account Setup* process, the designated AR for the account must complete, sign, and return the Profile Report that is e-mailed to the AR and the AM at the end of the *Account Setup* process (Section 4.3.2).

The Profile Report should be received by the AR within 12 business days of the *Account Setup* process being completed by the AM. If the Profile Report is not received within 12 business days, contact an EDI Representative. See Section 2.5.5.1 for information on contacting an EDI Representative.

To complete the Profile Report and the Account Setup process, the AR must:

1. Review the Profile Report for correctness.
2. Sign the Profile Report.

3. Return the Profile Report to the BCRC with 60 business days of being sent, according to the instructions printed with the Profile Report.

Once the BCRC receives the Profile Report, they will fully activate the account. If the BCRC does NOT receive the signed Profile Report within 60 business days of being sent, the associated account will be deleted.

The signed Profile Report can be returned via e-mail. When returning the profile report via e-mail, enter “CRCP Profile Report” in the subject line.

> **Note:** Prior to the BCRC’s receipt of the signed Profile Report, the account remains in Pending status. While the account is in Pending status, AMs can still access the CRCP and invite Account Designees (ADs) to the account (see Chapter 7) for information on inviting an AD). Access to any functionality related to PPNs and Demands is disabled during this time.

Chapter 5: Logging in to the CRCP

This chapter provides a description of the CRCP login process and the structure of the *Welcome to CRCP* page in particular.

5.1 Login

All AMs and ADs must be associated to a CRCP account and have a valid Login ID and a password in order to log in to the CRCP system and use the PPN, Demand, and Case Information features.

After the AM (and any ADs) have self-registered, the AR has returned the signed Profile Report, and the AM has completed the *Account Setup* process, then the AM and ADs can log into the CRCP using their Login ID and Password.

5.1.1 Account Login

Login Steps

1. On the *Welcome to the CRCP* page (Figure 3-2), enter your Login ID in the *Login ID* field, and your Password in the *Password* field.
2. Click **Clear** to clear the data in the *Login ID* and *Password* fields or to remove any error messages associated to these fields that are displaying on the page.
3. Click **Login** to log in to the CRCP.

   The *Account Listing* page appears (Section 5.2).

Note: AMs and ADs cannot view or manage cases until the EDI Representative has received a valid, signed copy of the Profile Report. Until the signed Profile Report has been received, the AM will be able to invite ADs and update the Authorized Representative information, but will not be able to access any functionality related to a PPN or Demand.

5.1.2 Login Help

5.1.2.1 Forgot Login ID

If you have forgotten your Login ID, you can request it from the *Welcome to the CRCP* page. You will be required to provide the e-mail address and the answers to the security questions that you supplied when you originally registered.

To request your Login ID:

1. Click **Forgot Login ID** on the *Welcome to the CRCP* page.

   The *Forgot Login ID* page displays.
2. Enter your registered CRCP e-mail address in the *Enter Your E-mail Address* field, and click **Continue**.

   The *Forgot Login ID or Password* page displays (Figure 5-2).

3. Enter the answers to your security questions in the *Answer 1* and *Answer 2* fields.
4. Click **Continue**.

   The *Forgot Login ID Confirmation* page displays (Figure 5-3) if your answers are correct. This page confirms that you have successfully requested your Login ID.
5. You can also click **Cancel** on the *Forgot Login ID* page or the *Forgot Login ID or Password* page to cancel the Login ID request and return to the *Welcome to the CRCP* page.
6. If the information you entered is correct, you will receive an e-mail that contains your Login ID once your request has been processed. If you receive an error indicating that the answers are incorrect, check your answers and enter the information again. If you cannot remember the answers to your security questions, contact an EDI Representative.

If you do not receive your e-mail within 24 hours, please contact an EDI Representative at (646) 458-6740 for assistance**.**

Figure 5-1: Forgot Login ID Page

Table 5-1: Forgot Login ID Page Fields

Field	Description
Enter Your E-mail Address	Enter the e-mail address associated with your Login ID.
Cancel	This button cancels the process and displays the *Welcome to the CRCP* page
Continue	This button searches for your E-mail address and displays the *Forgot Login ID or Password* page.

Figure 5-2: Forgot Login ID or Password Page

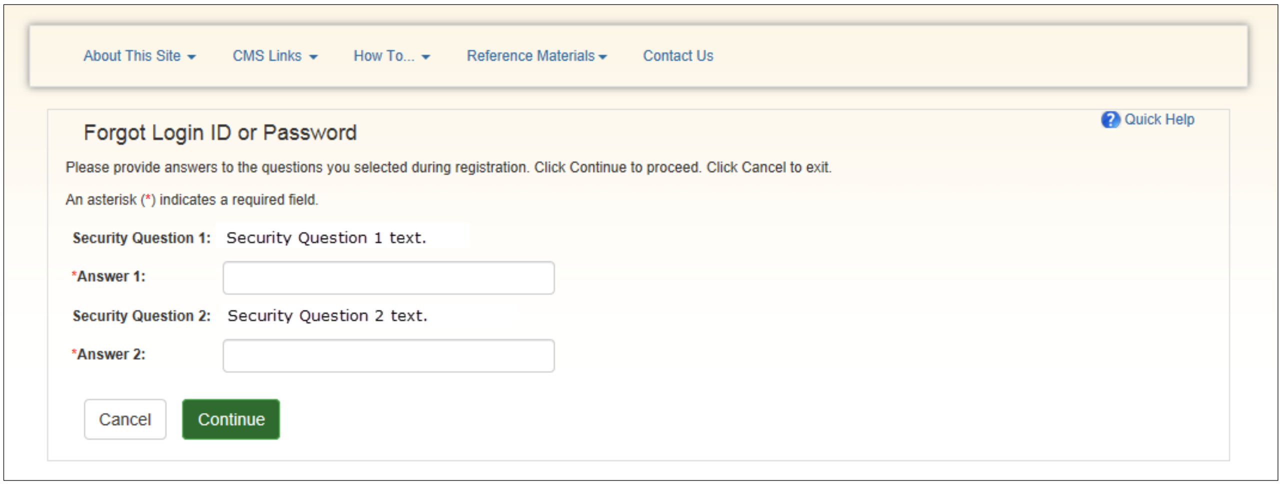
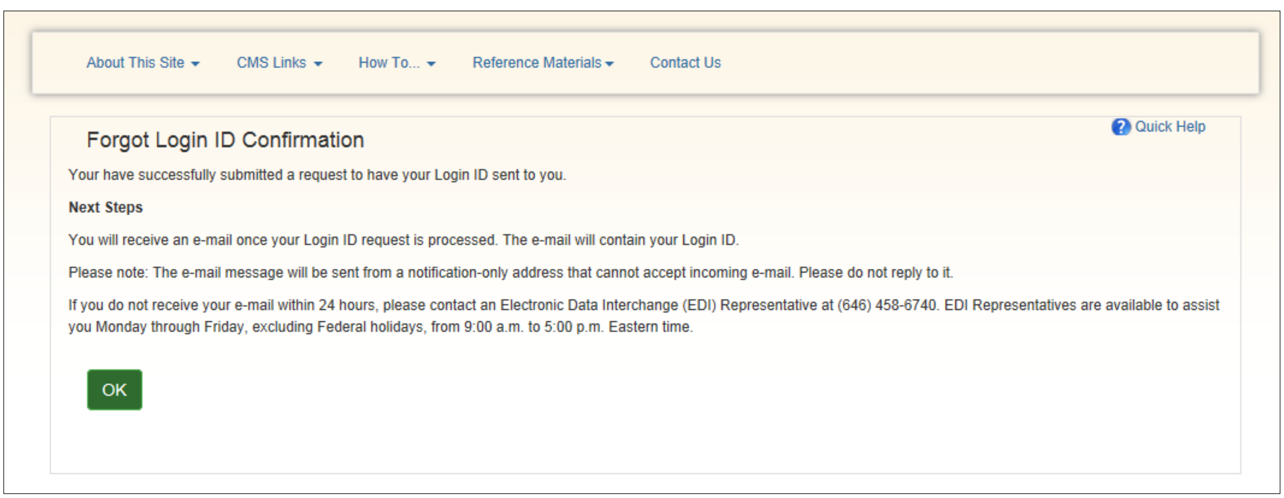


Table 5-2: Forgot Login ID or Password Page Fields

Field	Description
Security Question 1	Displays the first security question you selected during registration.
Answer 1	Enter the answer you supplied to security question 1 during registration.
Security Question 2	Displays the second security question you selected during registration.
Answer 2	Enter the answer you supplied to security question 2 during registration.
Cancel	This button cancels the process and displays the *Welcome to the CRCP* page
Continue	This button saves your request and displays the *Forgot Login ID Confirmation* page or *Forgot Password Confirmation* page, as applicable.

Figure 5-3: Forgot Login ID Confirmation Page



5.1.2.2 Forgot Password

If you forget your password, you can reset it from the *Welcome to the CRCP* page. You must be a registered user who has previously obtained a Login ID and Password for the CRCP to make this request. If you do not have a CRCP Login ID, refer to the *How to Get Started* Help document under the *How To…* menu for more information regarding the registration process.

To reset your Password:

1. Click **Forgot Password** on the *Welcome to the CRCP* page.

   The *Forgot Password* page displays.
2. Enter your Login ID in the *Login ID* field, and click **Continue**.

   The *Forgot Login ID or Password* page displays.
3. Enter the answers to your security questions in the *Answer 1* and *Answer 2* fields.
4. Click **Continue**.

   The *Forgot Password Confirmation* page displays (Figure 5-5) if your answers are correct. This page confirms that you have successfully requested a temporary password.
5. You can also click **Cancel** on the *Forgot Password* page or the *Forgot Login ID or Password* page to cancel the password reset and return to the *Welcome to the CRCP* page.

If the information you entered is correct, you will receive an e-mail with a temporary password and instructions to follow. If you receive an error indicating that the answers are incorrect, check your answers and enter the information again. If you cannot remember the answers to your security questions, contact an EDI Representative.

> **Note:** resetting your password on the CRCP Also resets it for all other COBSW application portals.

If you do not receive your e-mail within 24 hours, contact an EDI Representative at (646) 458-6740 for assistance.

Figure 5-4: Forgot Password Page

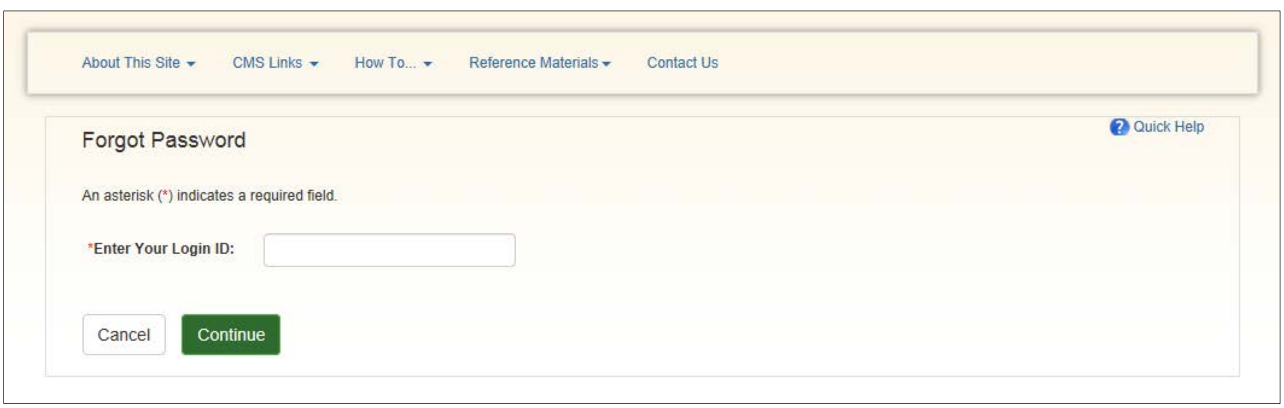
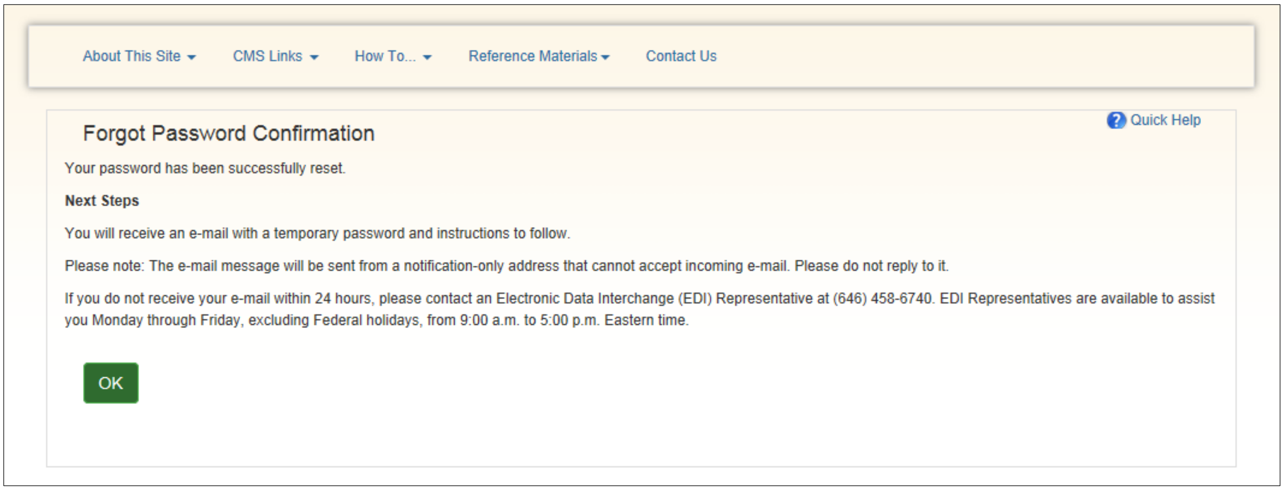


Table 5-3: Forgot Password Page Fields

Field	Description
Enter Your Login ID	Enter your Login ID.
Cancel	This button cancels the process and displays the *Welcome to the CRCP* page.
Continue	This button searches for your Login ID and displays the *Forgot Login ID or Password* page.

Figure 5-5: Forgot Password Confirmation Page



5.1.2.3 Other Login Issues

On an unsuccessful login attempt, you may encounter an error message. See Chapter 12 for a list of common errors and descriptions.

5.1.3 Concurrent Sessions

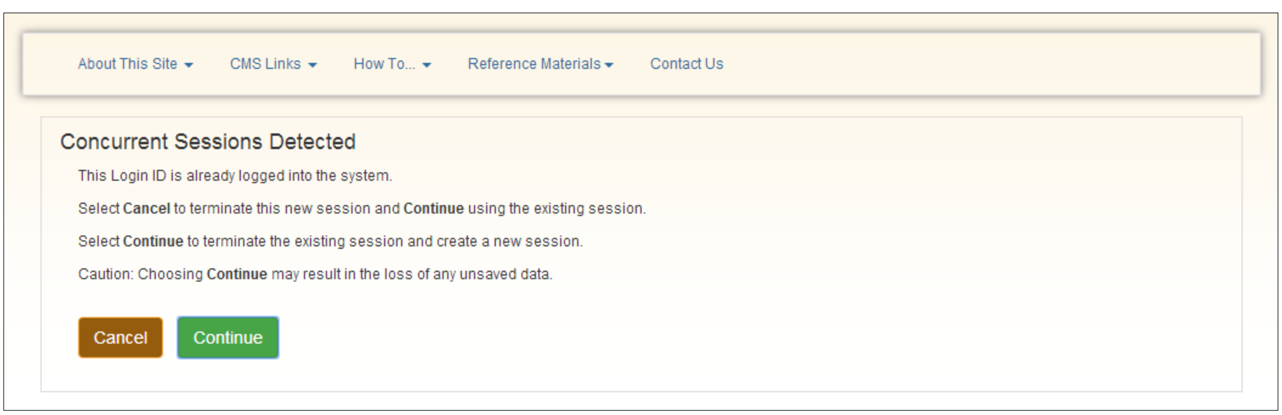
If you attempt to log in with your Login ID when you are already logged in in another session window, the *Concurrent Sessions Detected* page displays. This page alerts you to the previously active session, and gives you options to end the pre-existing session or cancel the current login process.

On the *Concurrent Sessions Detected* page:

Click **Continue** to close the previous session and continue to the *Account Listing* page.

Click **Cancel** to display the *Login Warning* page in the current window and leave the previous session running.

Figure 5-6: Concurrent Sessions Detected Page



5.2 Account Listing Page

The *Account Listing* page displays upon successful login. This page can be considered the CRCP "Home" page.

The *Account Listing* page displays the *Account ID* column and corresponding *Company Name* column for each CRCP Account ID that is associated with your Login ID. A third column titled *Associated TINs* displays a **View TINs Listing** hyperlink.

Clicking the hyperlinked Account ID displays the *Account Detail* page for that Account ID (Section 8.3).

Clicking the **View TINs Listing** hyperlink displays the *TINs Associated to Account ID* page for the selected Account ID (Section 8.6).

Figure 5-7: Account Listing Page

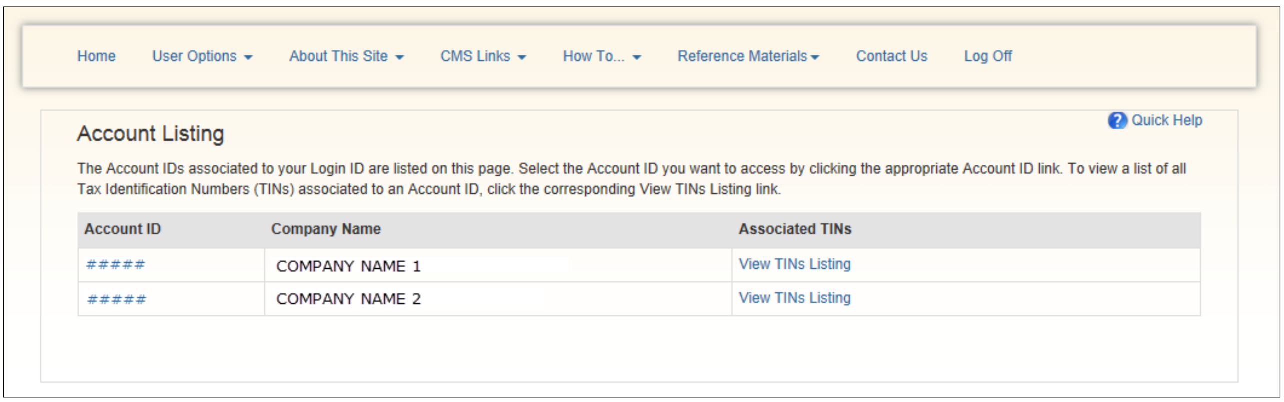


Table 5-4: Account Listing Page Fields

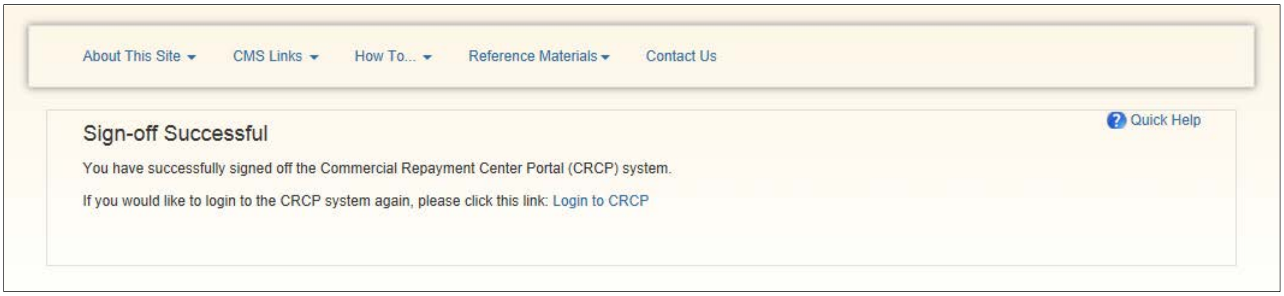
Field	Description
Account ID	Displays a list of Account IDs associated to the Login ID as a hyperlink. Clicking the hyperlinked Account ID displays the *Account Detail* page for that Account ID.
Company Name	Displays the name of the company as it appears on the letter used for registration that corresponds to the Account ID in the same row.
Associated Tax identification Numbers (TINs)	Displays the TIN that corresponds to the Account ID in the same row as a hyperlink. Clicking the **View TINs Listing** hyperlink displays the *TINs Associated to Account ID* page for the selected Account ID.

5.3 Logoff

From any page in the CRCP, click the **Log Off** link in the navigation bar.

The system ends your session and displays the *Sign-off Successful* page (Figure 5-8). Once this displays, you can close your browser. You can also click the **Commercial Repayment Center Portal** link to return to the *Login Warning* page.

Figure 5-8: Sign-Off Successful Page



5.3.1 Log Off Due to Inactivity

If you do nothing in a session for 15 minutes, the CRCP will automatically attempt to log you off. The *Session Inactivity Warning* page displays in a new browser window. You will have 60 seconds from the time it appears to confirm that you want to extend your session.

Click **Continue** on the *Session Inactivity Warning* page to continue the current session. If you do not click **Continue**, you will be logged off and the *Login Warning* page will be displayed.

Figure 5-9: Session Inactivity Warning Screen

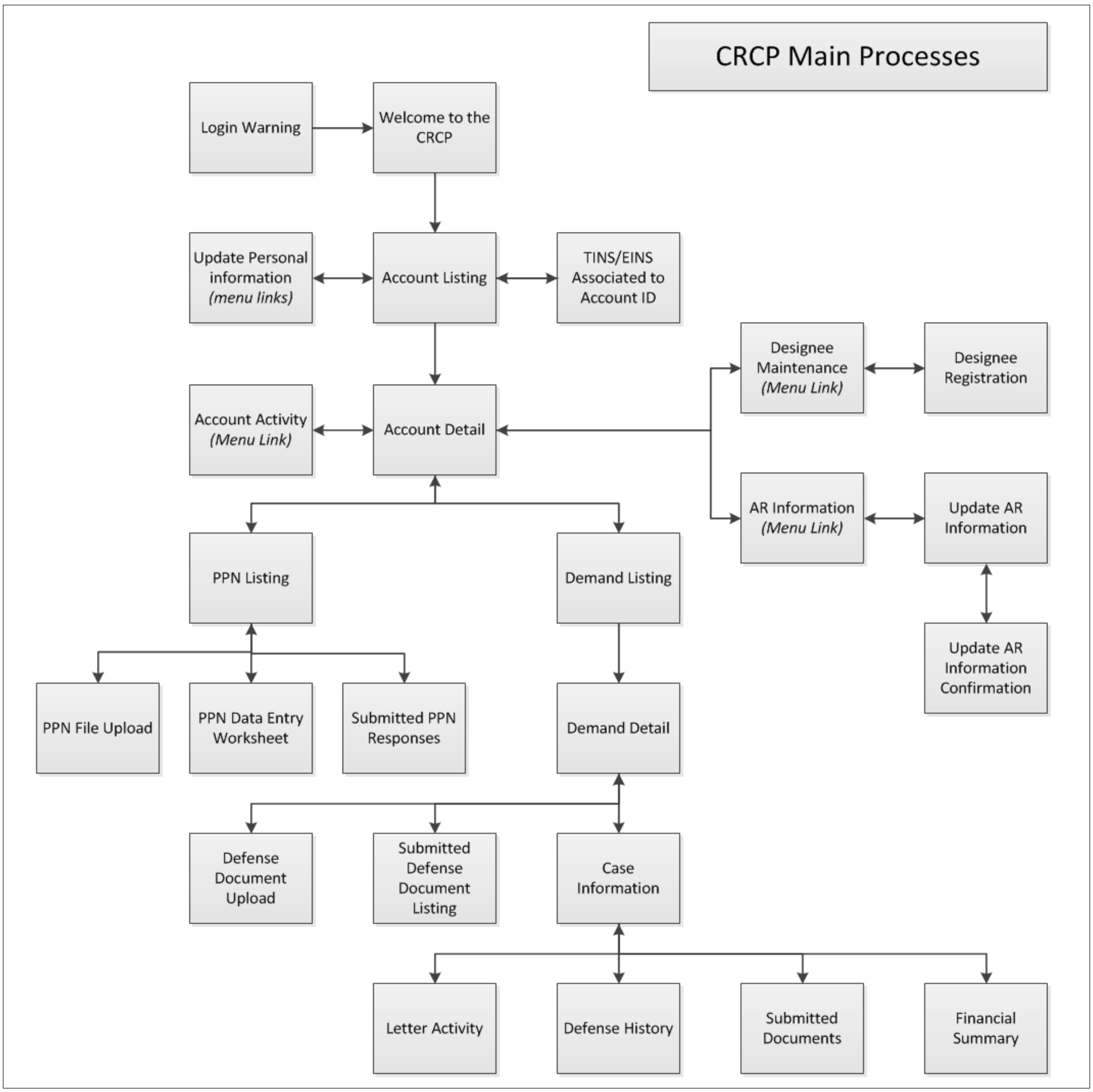
Chapter 6: Navigating the CRCP

6.1 Structure of the CRCP

The CRCP is designed to keep common functions and processes as close together as possible. This means that pages related to PPNs, Case Information, Designee Maintenance, etc., are grouped together with pages of similar functions.

This figure outlines the high-level structure and processes of the CRCP:

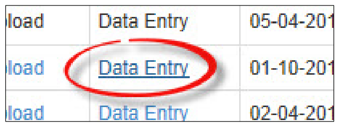
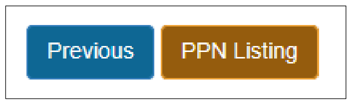
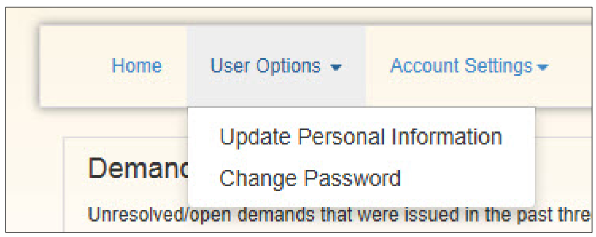
Figure 6-1: CRCP Main Processes



To navigate between pages, the CRCP includes navigation buttons, on-page hyperlinks, and the navigation bar. Some navigation bar options include drop-down menus for additional options.

Examples of these elements are displayed below.

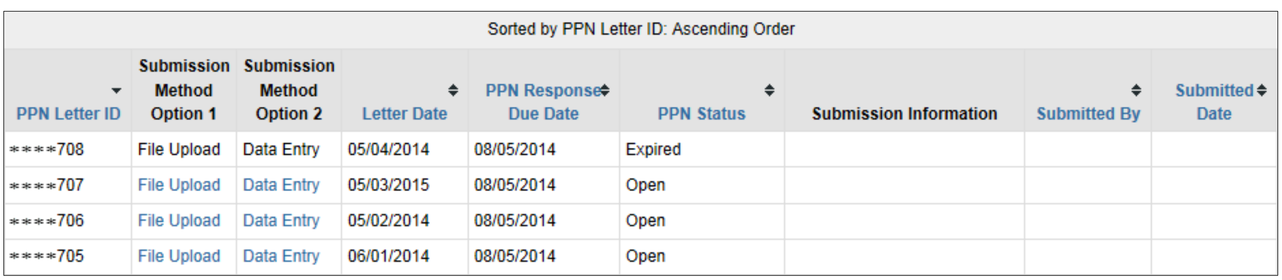
Table 6-1: Navigation Element Examples

Element	Image
Hyperlink	
Navigation Button	
Navigation Bar	

Additionally, most column headers allow sorting. Clicking on a column header allows you to sort the data in that column alpha-numerically, either ascending or descending. Click the column header again to reverse the sorting order.

In these examples, clicking **PPN Letter ID** alternates the sort order.

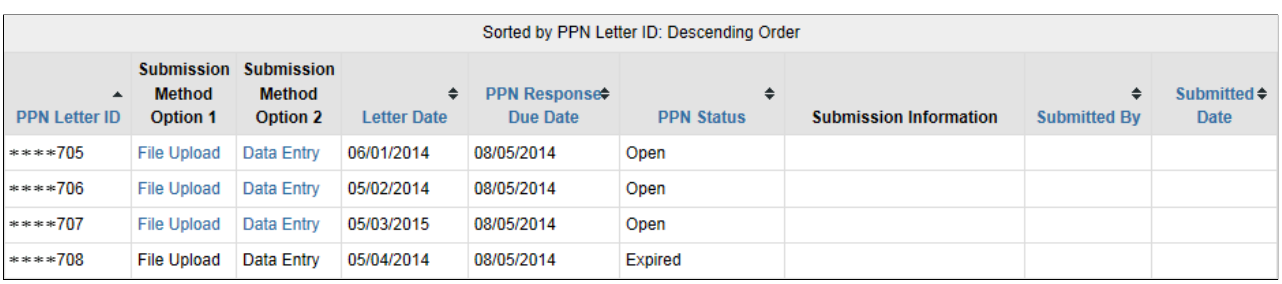
Figure 6-2: Example Table, *PPN Letter ID* Column Sorted Ascending



Sorted by PPN Letter ID: Ascending Order

PPN Letter ID	Submission Method Option 1	Submission Method Option 2	Letter Date	PPN Response Due Date	PPN Status	Submission Information	Submitted By	Submitted Date
****708	File Upload	Data Entry	05/04/2014	08/05/2014	Expired			
****707	File Upload	Data Entry	05/03/2015	08/05/2014	Open			
****706	File Upload	Data Entry	05/02/2014	08/05/2014	Open			
****705	File Upload	Data Entry	06/01/2014	08/05/2014	Open			

Figure 6-3: Example Table, *PPN Letter ID* Column Sorted Descending



Sorted by PPN Letter ID: Descending Order

PPN Letter ID	Submission Method Option 1	Submission Method Option 2	Letter Date	PPN Response Due Date	PPN Status	Submission Information	Submitted By	Submitted Date
****705	File Upload	Data Entry	06/01/2014	08/05/2014	Open			
****706	File Upload	Data Entry	05/02/2014	08/05/2014	Open			
****707	File Upload	Data Entry	05/03/2015	08/05/2014	Open			
****708	File Upload	Data Entry	05/04/2014	08/05/2014	Expired			

6.2 Navigation Bar

The navigation bar displays at the top of each CRCP web page and provides menus containing links to common pages and additional information to assist you in using the CRCP.

Figure 6-4: Navigation Bar

Table 6-2: Navigation Bar

Link	Description
Home	Links to the *Account Listing* page from any page in the CRCP.
User Options	This drop-down menu links to the *Update Personal Information* page and the *Change Password* page. See Section 11.1 for more information. This menu is available only after login.
Account Settings	This pull-down menu links to: • View or Update Authorized Representative (AR) Information (Account Manager only) • Designee Maintenance (Account Manager only) • View Account Activity (Account Manager and Account Designees can access) • View Associated TINs (Account Manager and Account Designees can access) The *Account Settings* option only becomes visible after you select an Account ID from the *Account Listing* page.
About This Site	Links to the *How to Use This Site* document, which offers general information on how to use the CRCP application.
CMS Links	This pull-down menu links to CMS web sites.
How To…	Provides links to Help pages that explain how to perform the following functions: • How to Get Started • How to Request your Login ID • How to Request your Password • How to Change your Password • How to Reset Your PIN • How to Change your Authorized Representative • How to Change your Account Manager • How to Invite and Remove Account Designees
Reference Materials	Links to the CRCP User Manual (this guide).
Contact Us	Provides contact information for the BCRC (which houses the EDI Department) and the Commercial Repayment Center (CRC), including operating hours and phone numbers for both organizations. See Section 2.5.5 for more information.
Log Off	Allows you to end the CRCP session and exit the system. See Section 5.3 for more information.

6.3 Additional Information

After you log in, the section above the page logos displays the **Print this Page** link, the current Login ID, and the **Skip Navigation** link.

Print this Page

Click **Print this Page** to display local print options for the current browser window.

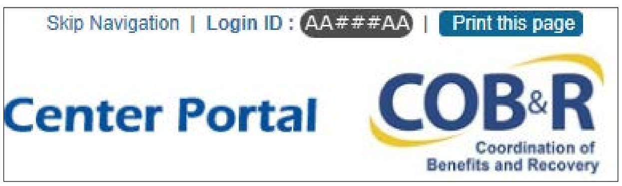
Displayed Login ID

The currently logged in user's Login ID is displayed in read-only format.

Skip Navigation

Click this hyperlink to jump past the navigation menu directly to the page content. This allows screen readers to skip reading the navigation menu for the current page.

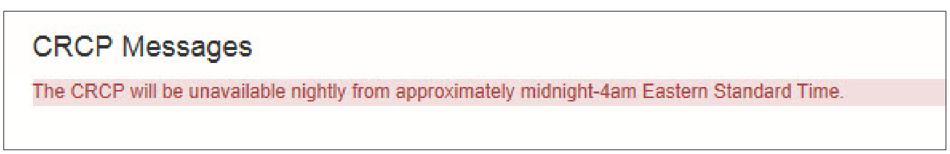
Figure 6-5: Additional Information Links



6.4 CRCP Messages

The *CRCP Messages* section of the *Welcome to the CRCP* page displays system messages, including alerts, messages, and updates from the EDI Representative.

Figure 6-6: CRCP Messages



Chapter 7: Inviting Users to Accounts

7.1 Account Designee (AD) Information

The Account Designee (AD) user role is an optional role in the CRCP, and each CRCP account may have zero, one, or up to 100 ADs.

ADs assist the AM with the GHP recovery cases. ADs may select from a number of actions available for managing an account, such as viewing or submitting PPNs, viewing demands and case information, and submitting defense documentation.

See Section 2.4.3 for more details on the AD role responsibilities and restrictions.

All ADs must be invited to register by the AM. ADs can be added, edited, and deleted at the Account ID level from the *Account Designee Listing* page.

An AM for one CRCP account can be an AD for a different CRCP account. A user cannot be both AM and AD for the same CRCP account.

7.1.1 Account Designee Listing Page

Use the navigation bar to access the *Account Designee Listing* page: in the *Account Settings* menu (visible after you select an Account ID from the *Account Listing* page), select **Designee Maintenance**.

The *Account Designee Listing* page displays (Figure 7-2). This page shows all individuals who were invited to be ADs for the current Account ID.

Figure 7-1: Designee Maintenance Menu Option

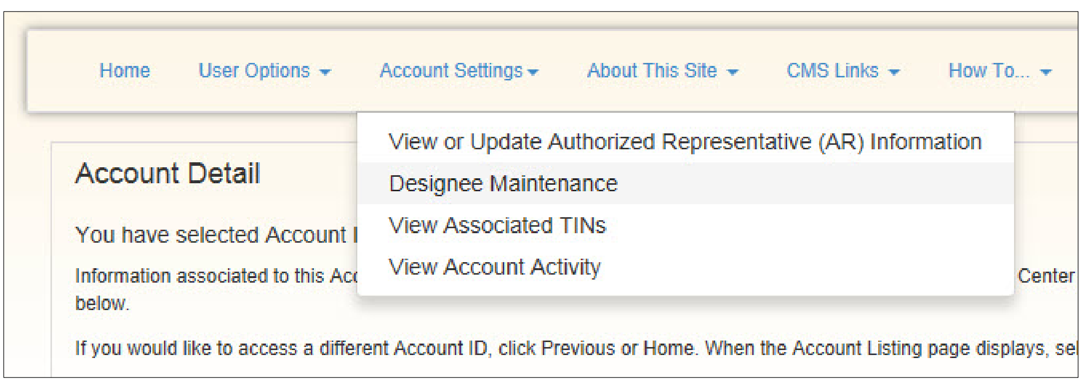


Figure 7-2: Account Designee Listing Page

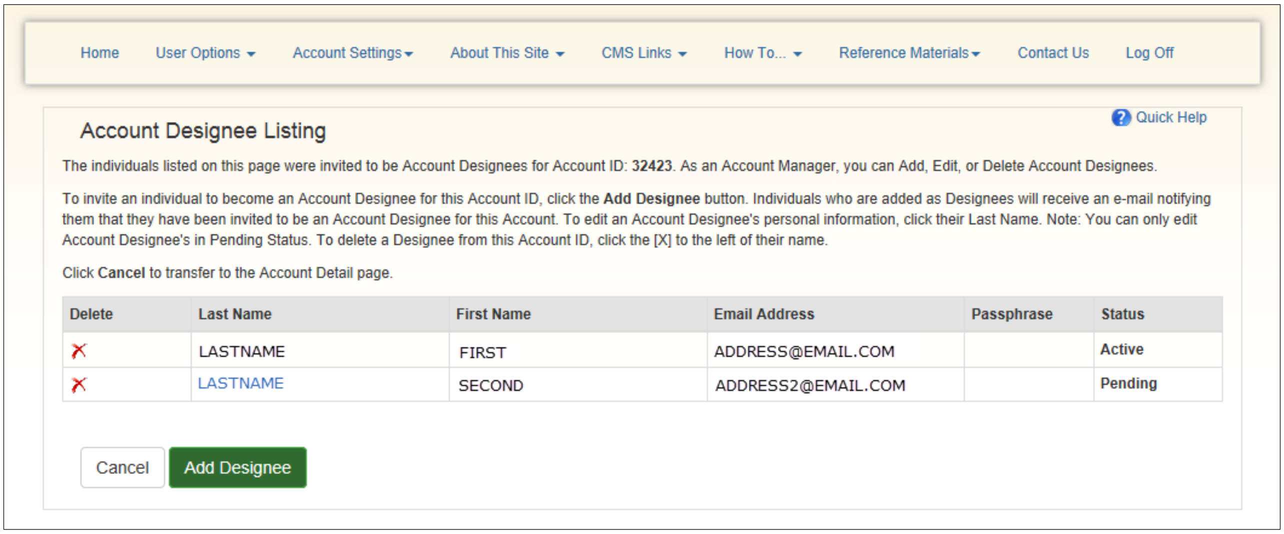


Table 7-1: Account Designee Listing Page Fields

Field	Description
Delete (Icon)	Displays the Delete icon (X) that deletes the AD in the same row.
Last Name	Displays the last name of the AD.
First Name	Displays the first name of the AD in the same row.
Email Address	Displays the e-mail address of the AD in the same row.
Passphrase	Displays the passphrase created by the AM that will be used by the AD to register for an account.
Status	Displays the status of the AD registration.
Add Designee	This button displays the *Account Designee Information* page and begins the process of adding a new AD.
Cancel	This button cancels the process and displays the *Account Detail* page.

7.2 AD Maintenance

AMs are responsible for inviting or adding ADs to an account and revoking or removing AD access to an account. All AD maintenance is initiated from the *Account Designee Listing* page.

7.2.1 Account Designee Listing Page: Basic Functions

From the *Account Designee Listing* page, the AM can perform several functions:

- Add an AD by inviting an individual to register (Section 7.2.1.1) for an Account ID
- Edit an AD's information while the AD's registration is still pending (Section 7.2.1.2)—this includes the option to regenerate the invitation e-mail to invite the AD to the Account ID
- Delete an AD from the Account ID (Section 7.2.1.3)

To return to the *Account Detail* page at any time, click **Cancel** from the *Account Designee Listing* page.

7.2.1.1 Add a Designee Steps

1. Click **Add Designee** from the *Account Designee Listing* page.

   The *Account Designee Information* page appears.

2. On the *Account Designee Information* page, enter and re-enter the e-mail address of the individual you are inviting to become an AD (see Table 7-2 for additional information on these fields).

3. Click **Continue** to proceed to the *Account Designee Invitation* page (Figure 7-4), or click **Cancel** to return to the *Account Designee Listing* page.

4. On the *Account Designee Invitation* page:

   If the e-mail address belongs to a registered COBSW user:

   a. Confirm that the read-only information displayed on the page is correct.

   If the e-mail address does NOT belong to a registered COBSW user:

   b. Enter the AD's first and last name in the *Designee First Name* and *Designee Last Name* fields. Next, enter a passphrase in the *Passphrase* and *Re-enter Passphrase* fields (see Table 7-3 for additional information on these fields).

5. Click **Continue** to proceed to the *Account Designee Confirmation* page (Figure 7-5).

   You can also click **Previous** to return to the *Account Designee Information* page, or click **Cancel** to return to the *Account Designee Listing* page.

   The *Account Designee Confirmation* page appears, listing the name and e-mail address of the new AD that you have just added.

6. Click **OK** to return to the *Account Designee Listing* page.

Individuals who are added as ADs will then receive an invitation e-mail notifying them that they have been invited to be an AD for the Account ID. AD invitees who do not yet have a Login ID and Password for any other COBSW system will be directed to follow the link sent in the e-mail to initiate the registration process, and must use the passphrase that the AM generated and gave to them in order to complete their registration. AD invitees who already have a Login ID and Password for another COBSW application will receive a notification e-mail, but can simply log into the CRCP system to access the account using their existing Login ID and Password.

Figure 7-3: Account Designee Information Page

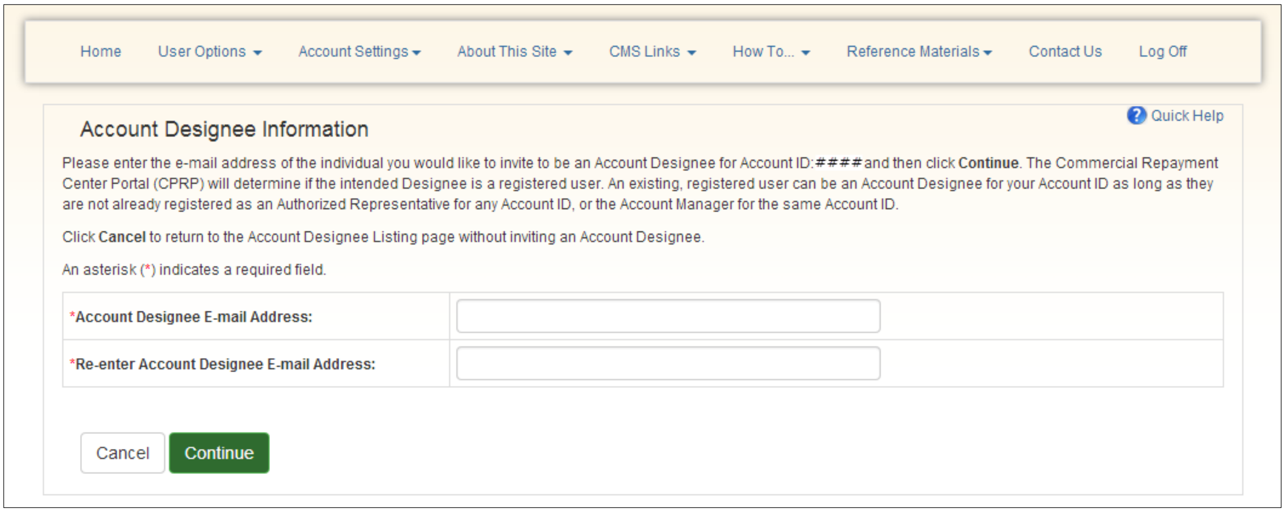


Table 7-2: Account Designee Information Page Fields

Field	Description
Account Designee E-mail Address	Enter the e-mail address of the individual you would like to invite to be an AD for the current account. The AD e-mail address cannot already be associated to an AR in any CRCP account, or to the AM of the currently selected account.
Re-enter Account Designee E-mail Address	Re-enter the e-mail address from the previous field.
Continue	This button saves the AD e-mail address and takes you to the *Account Designee Invitation* page.
Cancel	This button deletes all entered information, cancels the AD invitation process, and returns you to the *Account Designee Listing* page.

Figure 7-4: Account Designee Invitation Page

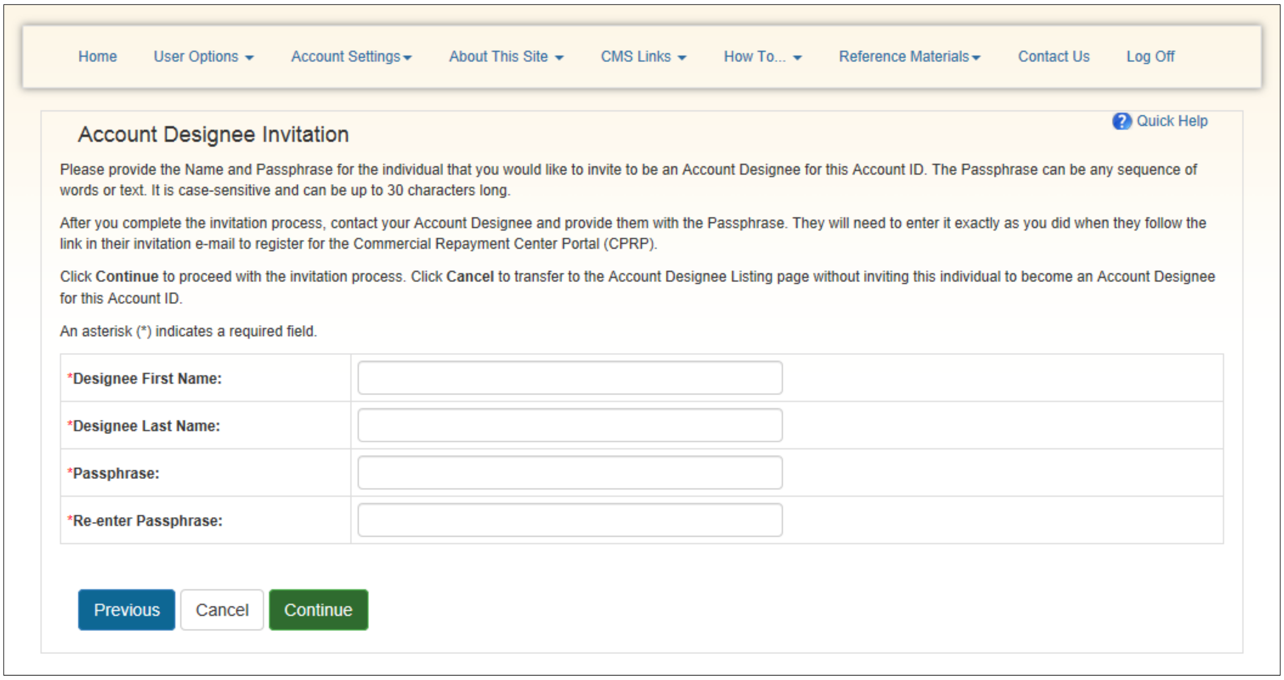
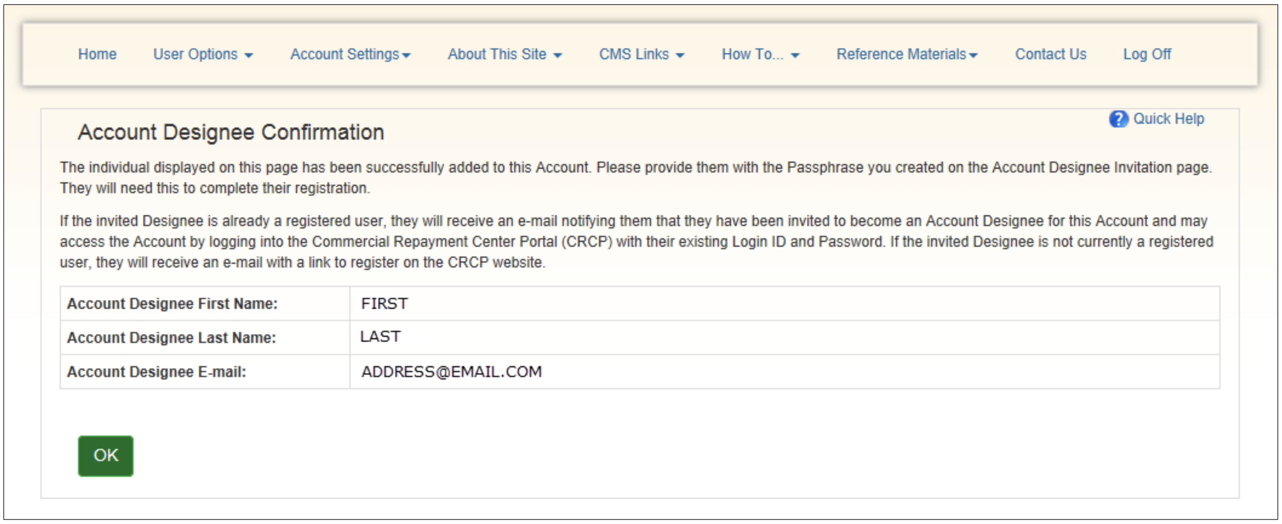


Table 7-3: Account Designee Invitation Page Fields

Field	Description
Designee First Name	Enter the full first name of the AR for the account. This field is alphabetic and can only contain letters, hyphens (-), and apostrophes (‘). You can enter up to 15 characters.
Designee Last Name	Enter the last name of the AR for the account. This field is alphabetic and can only contain letters, hyphens (-), and apostrophes (‘). You can enter up to 24 characters.
Passphrase	Enter the passphrase that the AD will use to complete the registration process. The passphrase can be any sequence of words or text. It is case-sensitive and can be up to 30 characters long. The AM must provide the AD with the passphrase. They will need to enter it exactly as it was entered by the AM when they follow the link in their invitation e-mail to register for the CRCP.
Re-enter Passphrase	Re-enter the passphrase from the previous field.
Previous	This button deletes any information added on this page and returns you to the *Account Designee Information* page without saving any data entered on this page.
Continue	This button saves the information on this page and takes you to the *Account Designee Confirmation* page.
Cancel	This button deletes all entered information, cancels the AD invitation process, and returns you to the *Account Designee Listing* page.

Figure 7-5: Account Designee Confirmation Page



7.2.1.2 Edit a Designee Steps

This process can also be used to regenerate the AD invitation e-mail with the registration link.

> **Note:** You can only edit ADs who have not yet completed their registration process (i.e., the Status is Pending).

1. From the *Account Designee Listing* page, click the hyperlinked last name of the AD you wish to edit.

   The *Update Account Designee Information* page (Figure 7-6) displays with the previously saved data for the AD populated in the editable fields.

2. Make any changes necessary to the fields. Note that all fields are required, and must be filled out correctly. You must also re-enter both the AD e-mail address and passphrase.
3. If you need to re-send the registration e-mail to the AD, select the **Regenerate…** checkbox.
4. Click **Continue** to save your changes and proceed to the *Update Account Designee Confirmation* page (Figure 7-7), or click **Cancel** to return to the *Account Designee Listing* page.
5. Click **Continue** to return to the *Account Designee Listing* page.

Figure 7-6: Update Account Designee Information Page

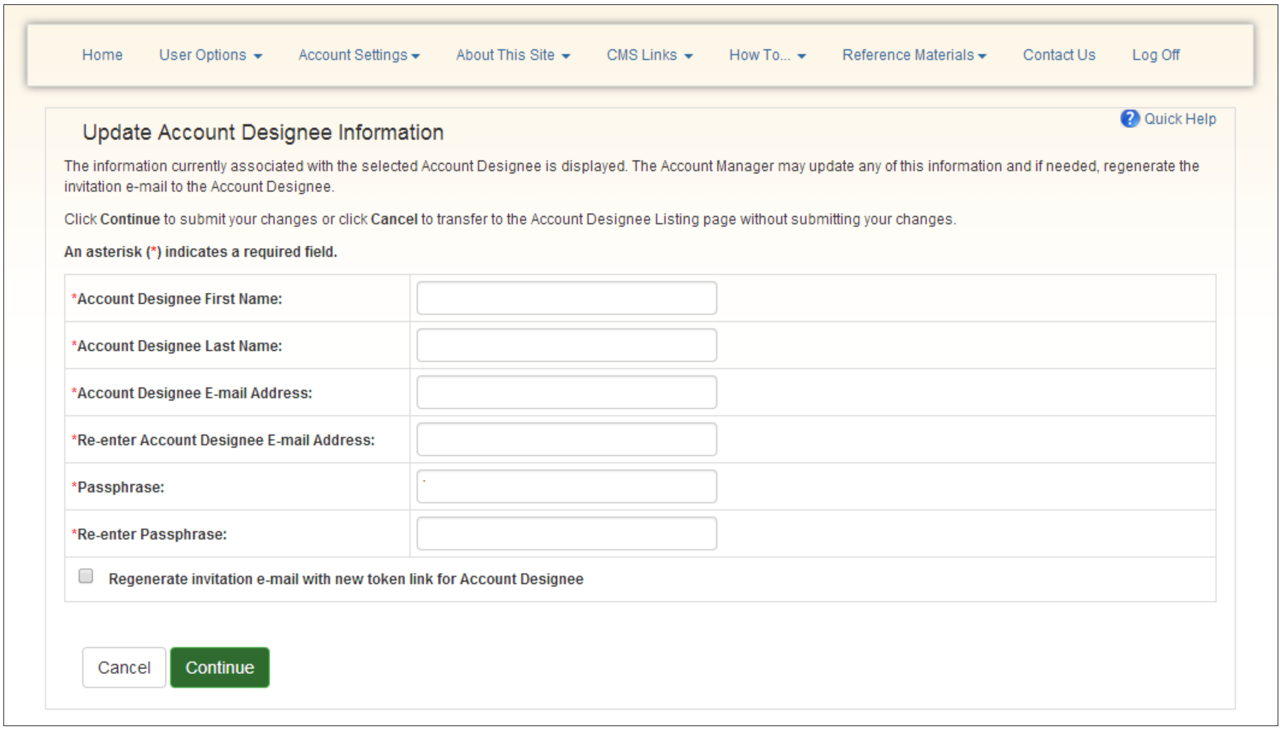


Table 7-4: Update Account Designee Information Page Fields

Field	Description
Account Designee First Name	Confirm the full first name of the AD on file for the account, and make updates as necessary. This field is alphabetic and can only contain letters, hyphens (-), and apostrophes ('). You can enter up to 15 characters.
Account Designee Last Name	Confirm the last name of the AD for the account, and make updates as necessary. This field is alphabetic and can only contain letters, hyphens (-), and apostrophes ('). You can enter up to 24 characters.
Account Designee E-mail Address	Confirm the e-mail address of the individual you would like to invite to be an AD for the current Account ID, and make updates as necessary. The AD e-mail address cannot already be associated to an AR in any CRCP account, or to the AM of the currently selected account.
Re-enter Account Designee E-mail Address	Re-enter the e-mail address from the previous field.
Passphrase	Confirm the passphrase that the AD will use to complete the registration process, and make updates as necessary. The passphrase can be any sequence of words or text. It is case-sensitive and can be up to 30 characters long. The AM must provide the AD with the passphrase. They will need to enter it exactly as it was entered by the AM when they follow the link in their invitation e-mail to register for the CRCP.
Re-enter Passphrase	Re-enter the passphrase from the previous field.
Regenerate invitation e-mail with new token link for Account Designee (Checkbox)	Select this checkbox to send a new registration e-mail with a new registration link to the AD.

Field	Description
Continue	This button saves the information on this page and takes you to the *Update Account Designee Confirmation* page.
Cancel	This button deletes all entered information, cancels the AD editing process, and returns you to the *Account Designee Listing* page.

Figure 7-7: Update Account Designee Confirmation Page

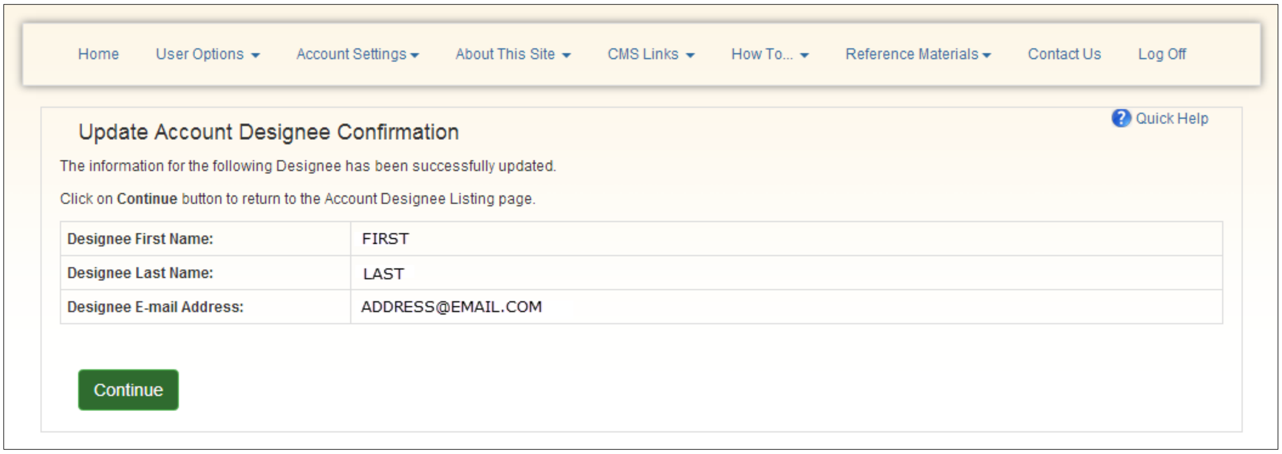


Table 7-5: Update Account Designee Confirmation Page Fields

Field	Description
Designee First Name	Displays the full first name of the AD.
Designee Last Name	Displays the last name of the AD.
Designee E-mail Address	Displays the e-mail address of the AD
Continue	This button re-displays the *Account Designee Listing* page. The designee displays.

7.2.1.3 Delete a Designee Steps

1. To delete an AD from this account, click the Delete icon **[X]** to the left of their name on the *Account Designee Listing* page. The *Delete Account Designee Confirmation* page displays (Figure 7-8).
2. Click **OK** to delete the AD from this Account ID.

   The *Account Designee Listing* page displays. The AD will no longer be listed on this page.
3. Or, click **Cancel** to return to the *Account Designee Listing* page. The AD will still be listed on this page and their status will be unchanged.

Figure 7-8: Delete Account Designee Confirmation Page

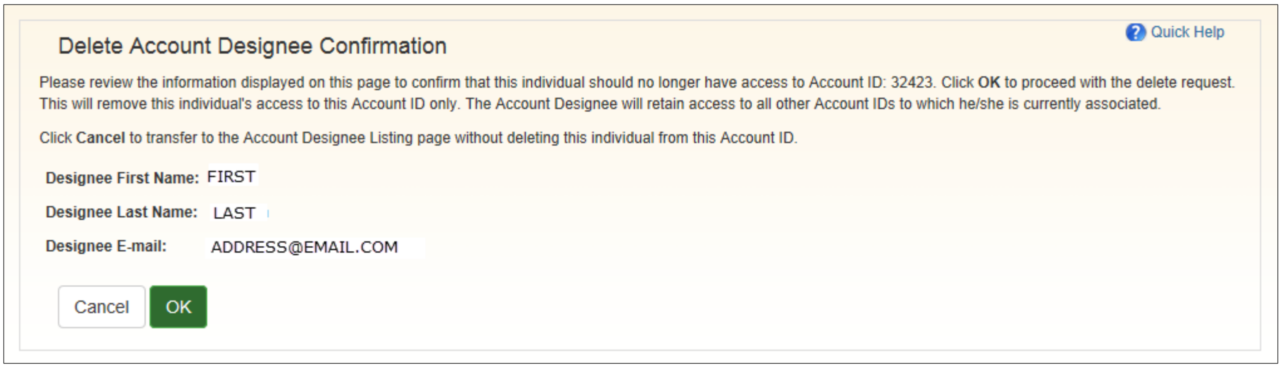


Table 7-6: Delete Account Designee Confirmation Page Fields

Field	Description
Designee First Name	Displays the full first name of the AD.
Designee Last Name	Displays the last name of the AD.
Designee E-mail	Displays the e-mail address of the AD
Cancel	This button re-displays the *Designee Listing* page. The designee is not deleted.
OK	This button re-displays the *Designee Listing* page. The designee is removed from the page.

7.3 AD Registration

When an AM invites an AD to work on a CRCP account, the CRCP sends an e-mail invitation to the AD. The AD must then register to gain access to the CRCP account.

The *Account Designee Registration* page allows a new AD to register as a user on the CRCP. The *Account Designee Registration* page includes information about the account, the Account Manager’s contact information, a text box for entering the passphrase, and a checkbox for accepting the User Agreement and Privacy Policy.

If you are an invited AD and have already registered on the CRCP or another COBSW site, then you can access the account by logging into the CRCP (Section 5.1). The *Account Listing* page lists all accounts you were invited to.

7.3.1 Summary of AD Registration Tasks

During registration, you (the AD) will complete the following tasks:

- Access the registration page and confirm your passphrase
- Complete personal information
- Complete login and password
- Verify login and personal information

7.3.2 AD Registration Steps

Access the Registration Page:

Note: All steps marked with an asterisk (*) are required.

1. Click the registration link in the e-mail you received.
2. On the *Account Designee Registration* page (Figure 7-9), enter the passphrase provided by your AM.

   If you have forgotten the passphrase, contact your AM. The passphrase is not included in the e-mail.
3. Read the User Agreement and Privacy Policy, and click the **I accept the User Agreement and Privacy Policy** checkbox.
4. Click **Continue** to proceed to the *Account Designee Personal Information* page (Figure 7-10), or **Cancel** to delete all data entered, cancel the registration process, and return to the CRCP *Login Warning* page.

Complete Personal Information

5. Complete all of the fields (*First Name*, *Middle Initial* [optional], *Last Name*, *Phone*, *Extension* [optional], *Address Line 1*, *Address Line 2* [optional], *City*, *State*, and *Zip Code*) on the *Account Designee Personal Information* page.

   Note: Your e-mail address is displayed as read-only. If you need to modify your e-mail address, you can do so only after completing the registration process. Then, go to the *Update Personal Information* page under the *User Options* drop-down menu.
6. Click **Continue** to proceed to the *Account Designee Login Information* page (Figure 7-11), or **Cancel** to delete all data entered, cancel the registration process, and return to the CRCP *Login Warning* page.

Complete Login Information

7. On the *Account Designee Login Information* page, read the login and password format requirements on the application page before proceeding.
8. Enter a *Login ID* (must be 7 characters in the format of two letters, three numbers, then two letters, as in AA999AA).

   See the Login ID requirements in Table 4-8.
9. Enter (and re-enter) a *Password.*

   See the password requirements in Table 4-8.
10. Select *Security Question 1* from the drop-down menu.
11. Enter an *Answer* to *Security Question 1*.
12. Repeat Steps 9 & 10 for *Security Question 2*. You cannot select the same security question for both questions #1 and #2.

    See Table 7-9 for additional field descriptions.

    Note: If you have problems with this login or password process, contact an EDI Representative at (646) 458-6740.

13. Click **Continue** to continue to the *Account Designee Registration Summary* page (Figure 7-12), or click **Cancel** to cancel the registration process and return to the CRCP *Login Warning* page.

Verify Personal and Login information

14. On the *Account Designee Summary Information* page, verify that your information is correct before continuing.
    a. To make changes to either the *Account Designee Personal Information* or *Account Designee Login Information* pages, click **Edit** in the *Personal Information* or *Login Information* sections (Figure 7-12).
    b. Make any necessary edits; then click **Continue** to return to the *Account Designee Summary Information* page.
15. Click **Continue** to submit the data and continue to the *Account Designee Thank You* page (Figure 7-13), or click **Cancel** to return to the *Login Warning* page.

Figure 7-9: Account Designee Registration Page

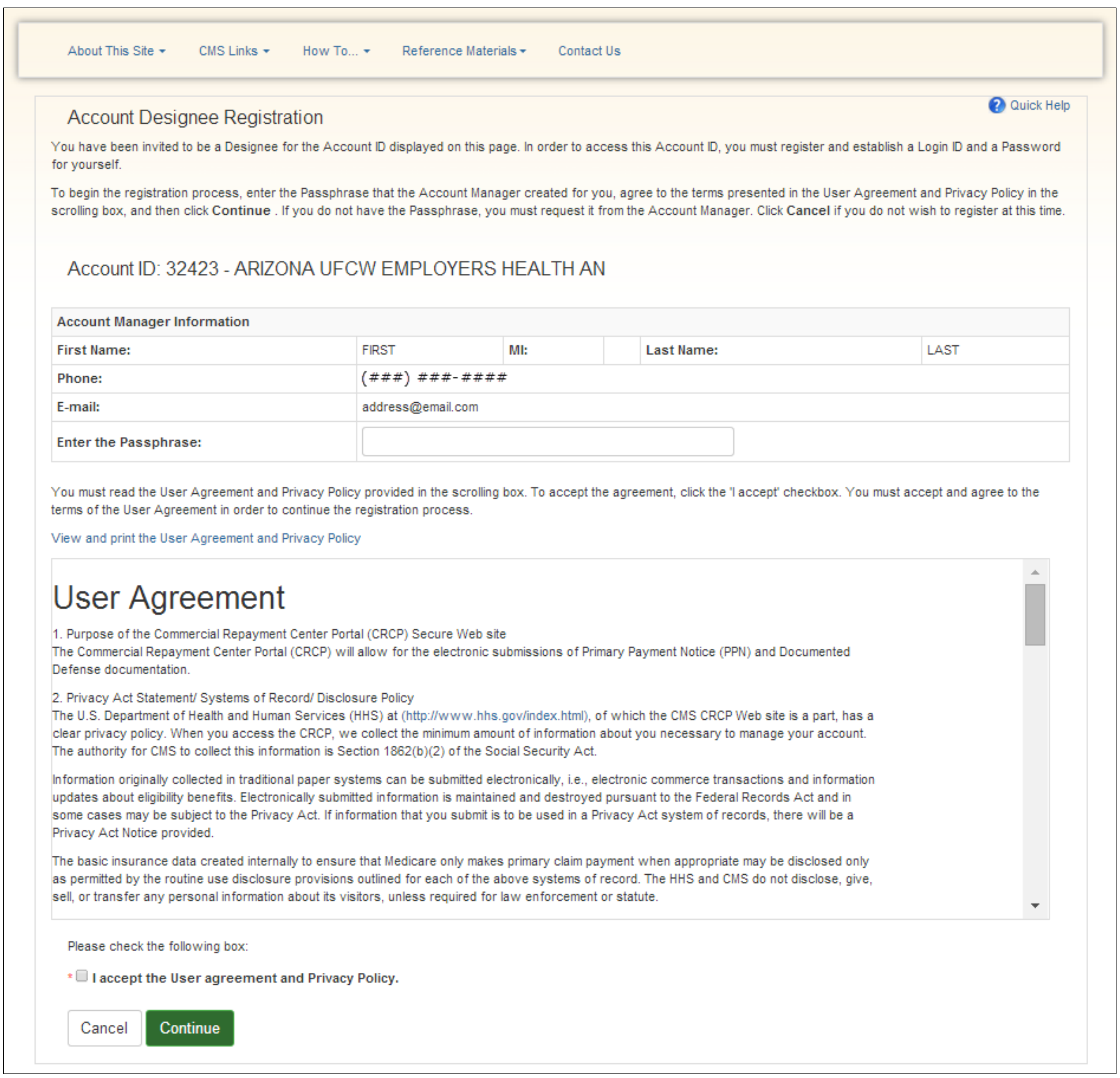


Table 7-7: Account Designee Registration Page Fields

Field	Description
First Name	Displays the first name of the AD in read-only format.
MI	Displays middle initial (if available) of the AD in read-only format.
Last Name	Displays the last name of the AD in read-only format.
Phone	Displays the phone number plus extension of the AD in read-only format.
E-mail	Displays the e-mail address of the AD in read-only format.
Enter the Passphrase	Enter the passphrase provided by the AM.
User Agreement and Privacy Policy (Checkbox)	Click this checkbox to indicate your acceptance of the User Agreement and Privacy Policy.
Cancel	This button deletes all entered information, cancels the registration process, and returns you to the *Login Warning* page.
Continue	This button saves the entered information in the system and takes you to the *Account Designee Login Information* page.

Figure 7-10: Account Designee Personal Information Page

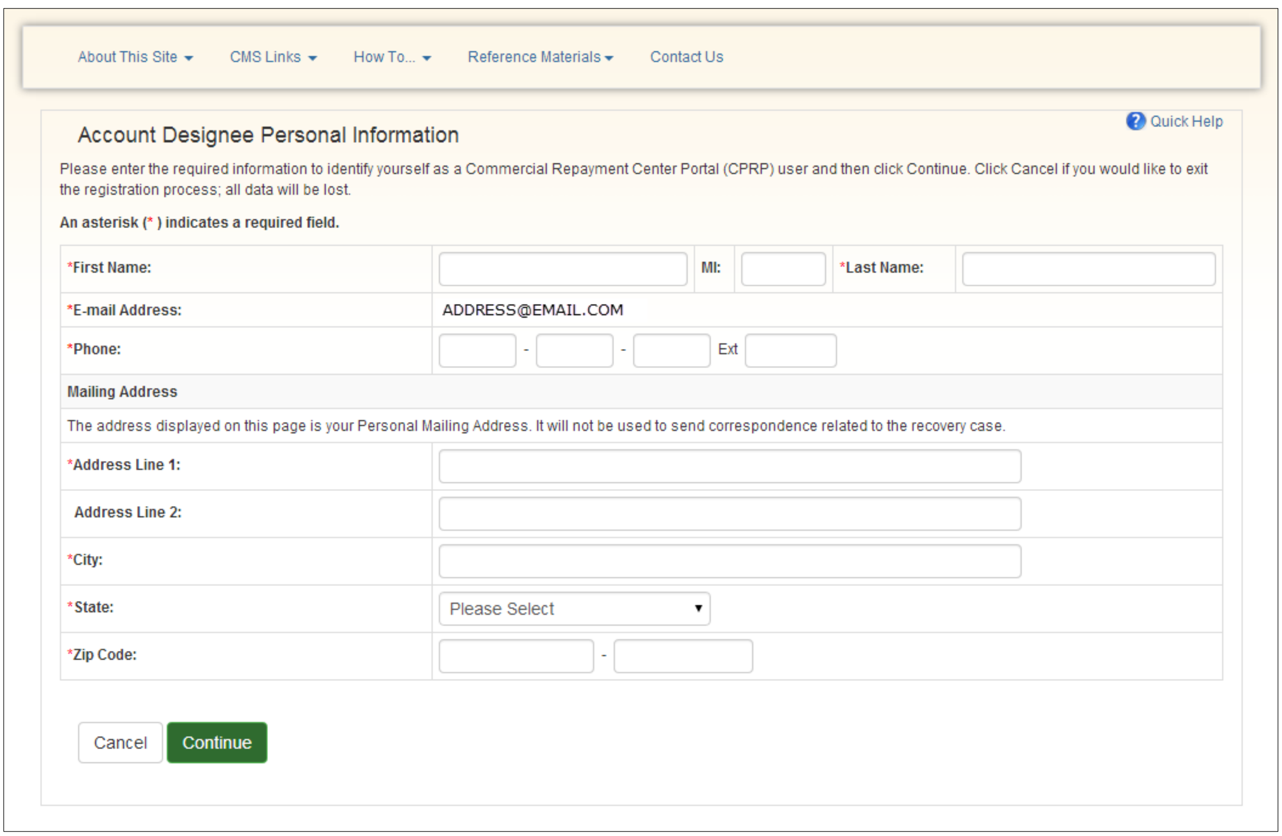


Table 7-8: Account Designee Personal Information Page Fields

Field	Description
First Name	Enter the first name of the AD. This field is alphabetic and can only contain letters, hyphens (-), and apostrophes (‘). You can enter up to 15 characters.
MI	Enter the middle initial of the AD. You can enter only one letter. This field is optional.
Last Name	Enter the last name of the AD. This field is alphabetic and can only contain letters, hyphens (-), and apostrophes (‘). You can enter up to 24 characters.
E-mail Address	This is a read-only field that is pre-filled from the information entered by the AM.
Phone + Ext.	Enter the 10-digit phone number for the AD. The phone number is numeric with no spaces. The extension is optional.
Address Line 1	Enter the address of the AD. You can enter up to 32 characters in this field. The address field must contain, at a minimum, at least two characters with 1 number and 1 letter.
Address Line 2	Enter additional address information for the AD. You can enter up to 32 characters in this field. This is an optional field.
City	Enter a city for the AD. This field can only contain letters, spaces, apostrophes, periods, hyphens, and colons.
State	Select a state from the drop-down menu.
Zip Code + Zip+4	Enter the 5-character Zip code and Zip+4. These fields are numeric. They cannot contain letters, spaces, or special characters. The Zip+4 field is optional.
Continue	This button saves the entered information in the system and takes you to the *Account Designee .Thank You* page.
Cancel	This button deletes all entered information, cancels the *AD Registration* process, and returns you to the *Login Warning* page.

Figure 7-11: Account Designee Login Information Page

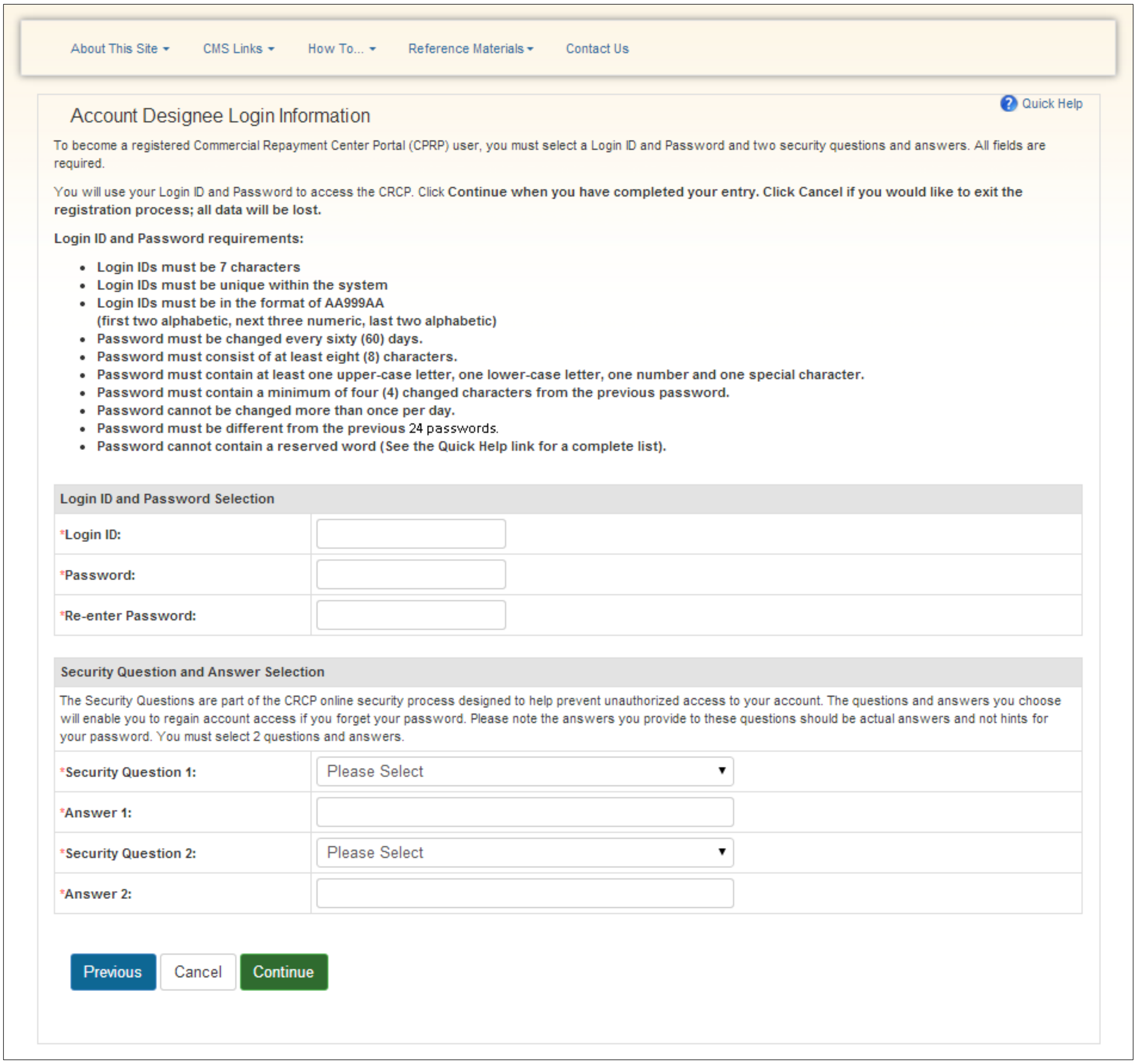


Table 7-9: Account Designee Login Information Page Fields

Field	Description
Login ID	Enter a Login ID. Login IDs must be: • Seven (7) characters • Unique within the COBSW system • In the format AA999AA (two letters, three numbers, then two letters).
Password	Enter a Password. Passwords must: • Be changed every sixty (60) days • Consist of at least eight (8) characters • Contain at least one upper-case letter, one lower-case letter, one number, and one special character • Contain a minimum of four (4) characters changed from the previous password • Not be changed more than once per day • Be different from the previous twenty-four (24) passwords • Not contain a reserved word (see Table 4-8 for a list of reserved words).
Re-enter Password	Enter the same password from the *Password* field.
Security Question 1	Select *Security Question 1* from the drop-down menu.
Answer 1	Enter an *Answer* to *Security Question 1*. The answers you provide to the security questions should be actual answers and not hints for your password. Memorize your answers.
Security Question 2	Select *Security Question 2* from the drop-down menu. This must be a different selection than your first security question.
Answer 2	Enter an *Answer* to *Security Question 2*. The answers you provide to the security questions should be actual answers and not hints for your password. Memorize your answers.
Previous	This button returns you to the *Account Designee Personal Information* page without saving any data you entered on this page.
Cancel	This button deletes all entered information, cancels the AD Registration process, and returns you to the *Login Warning* page.
Continue	This button saves the entered information in the system and takes you to the *Account Designee Registration Summary* page.

Figure 7-12: Account Designee Registration Summary Page

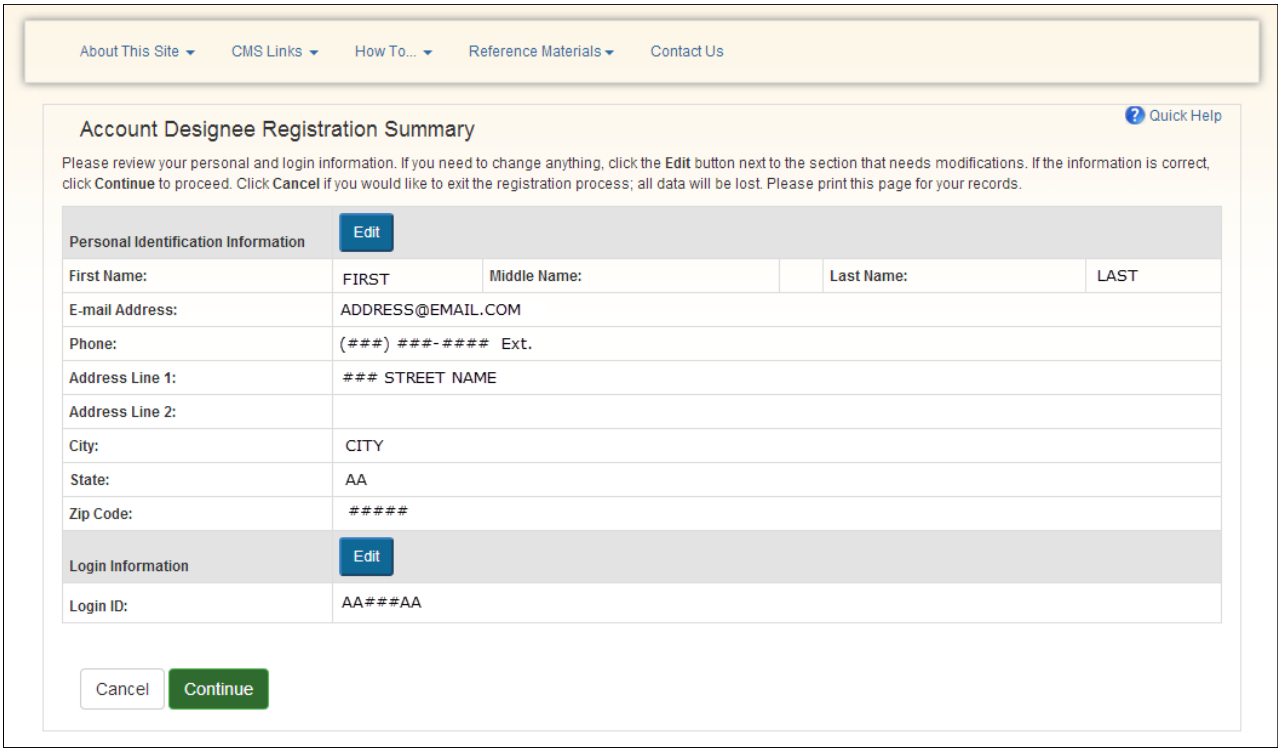
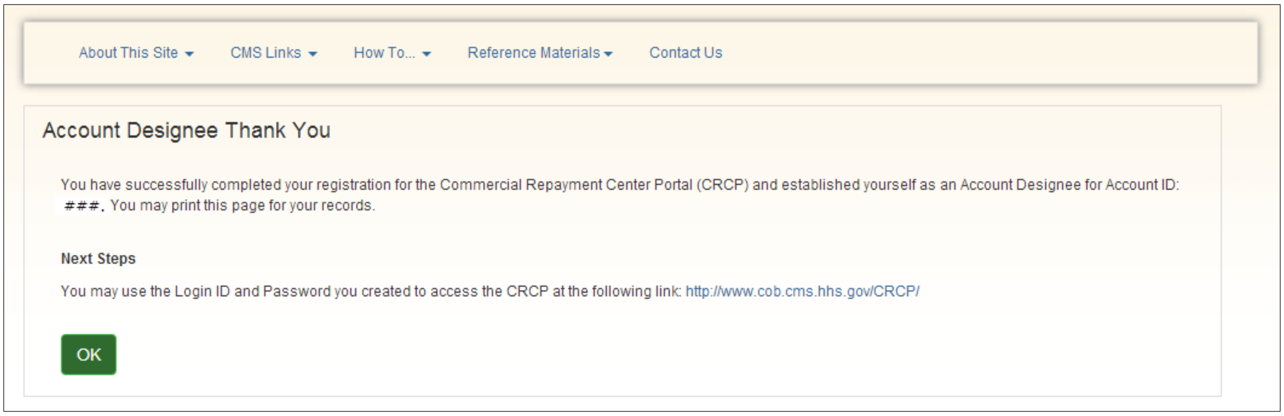


Table 7-10: Account Designee Registration Summary Page Fields

Field	Description
Personal Information	-
Edit	This button takes you to the *Account Designee Personal Information* page, with editable fields populated with previously entered data.
Login Information	-
Edit	This button transfers you to the *Account Designee Login Information* page, with editable fields populated with previously entered data.
Continue	This button saves all data you entered and takes you to the *Account Designee Thank You* page.
Cancel	This button deletes all entered information, cancels the AD Registration process, and returns you to the *Login Warning* page.

Figure 7-13: Account Designee Thank You Page



Chapter 8: Reviewing Accounts

8.1 Introduction

Each AM and AD can have access to multiple accounts on the CRCP for their Login ID. Each account has its own unique Account ID. Information such as demand letters, correspondence history, and PPN notices can be reviewed under the Account ID they are associated with.

8.2 Account Listing and Selection

The *Account Listing* page displays the *Account ID* column and corresponding *Company Name* column for each CRCP Account ID that is associated with your login ID. A third column titled *Associated TINs* displays a **View TINs Listing** hyperlink. See Section 5.2 for more information on the *Account Listing* page.

Click the hyperlinked **Account ID** to navigate to the *Account Detail* page for that Account ID (Section 8.3).

Click the **View TINs Listing** hyperlink to navigate to the *TINs Associated to Account ID* page for the selected Account ID (Section 8.6).

8.3 Account Details

After selecting an Account ID from the *Account Listing* page, the *Account Detail* page displays. The *Account Detail* page contains links to all relevant information for that Account ID.

8.3.1 The Account Detail Page

The *Account Detail* page (Figure 8-1) contains links to the *Demand Listing* page, the *PPN Listing* page, and the *Request Letter Access* page. These pages allow you access information related to open demand letters and case information, upload Defense documentation, submit responses to a PPN Letter, and perform additional actions related to account activity.

The *Account Detail* page is the starting point for reviewing information related to an Account ID.

Once you have navigated to the *Account Detail* page, the *Account Settings* drop-down menu is displayed in the navigation bar.

Account Managers can select from the following links in the *Account Settings* drop-down menu:

- View or Update Authorized Representative (AR) Information
- Designee Maintenance
- View Account Activity
- View Associated TINs

Account Designees can select from the following links in the drop-down menu:

- View Account Activity
- View Associated TINs

You can also remove access related to a letter associated to the Account ID displayed on the *Account Detail* page. To remove letter access, the Account Manager for this Account ID must contact an EDI Representative and provide them with key information from the letter that should be removed. You can contact an EDI Representative at (646) 458-6740.

Figure 8-1: Account Detail Page

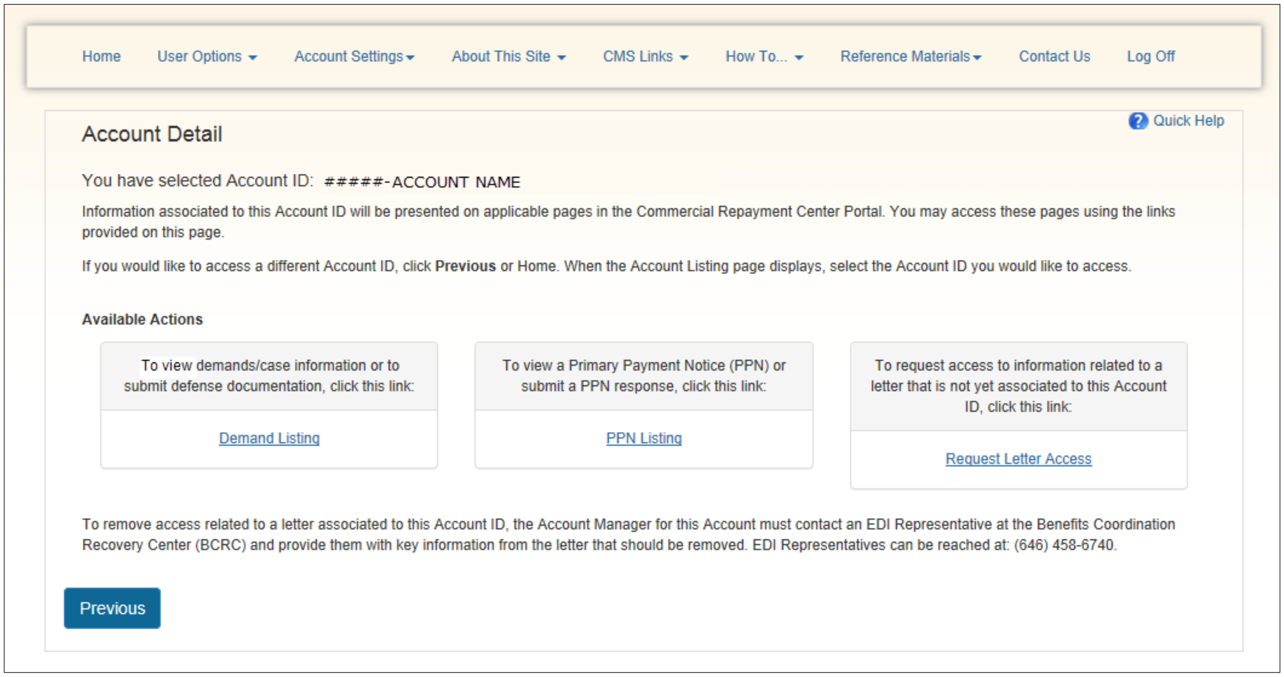


Table 8-1: Account Detail Page Fields

Field	Description
Demand Listing	This link takes you to the *Demand Listing* page.
PPN Listing	This link takes you to the *PPN Listing* page.
Request Letter Access	This link takes you to the *Request Letter Access* page.
Previous	This button takes you to the *Account Listing* page.

8.3.1.1 Demand Listing

The *Demand Listing* section of the CRCP lists current demand letter IDs that are associated with this Account ID. This section allows you to:

- View a list of demand IDs associated with the Account ID
- Search for a specific demand letter ID
- View details about open demands
- View case information related to demand letters
- Upload defense documentation
- View a list of defense documents that have been submitted via the CRCP

Access the *Demand Listing* section by clicking the **Demand Listing** link on the *Account Detail* page.

8.3.1.2 PPN Listing

The *PPN Listing* section of the CRCP lists PPNs from the past eight months that are associated with the current Account ID. This section allows you to:

- View PPNs associated to the Account ID
- Submit coverage updates for a PPN Worksheet before the due date via file upload or manual data entry
- View beneficiary coverage information

Access the *PPN Listing* section by clicking the **PPN Listing** link on the *Account Detail* page.

8.3.1.3 Request Letter Access

The *Request Letter Access* section of the CRCP allows you to submit a request to associate data related to a PPN, Demand, or Defense letter you received from the CRC that is not currently available on the portal for the selected Account ID.

8.4 Letter Access Requests

In some cases, information related to a PPN, Demand, or Defense letter you received from the CRC is not currently available on the portal for the selected Account ID. You may submit a letter access request to associate this data to the current account. To begin this process, you will need to enter and validate required information contained in the letter itself on the *Request Letter Access* page.

Once validated, information from the requested letter, as well information from all related letters, will be available on the *PPN Listing*, *Demand Listing*, and other applicable pages for this Account ID.

To access the *Request Letter Access* page, click **Request Letter Access** on the *Account Detail* page.

8.4.1 Request Letter Access Steps

1. On the *Request Letter Access* page (Figure 8-2), enter (and re-enter) the Letter ID and the Tax Identification Number (TIN) from the letter you want to associate to the Account ID.
2. Using the available radio buttons, select the type of letter you plan to use for the letter access request and enter the specific required information for that letter.

   See the “RE:” (“Regarding”) section of these letters to identify the key information you will need for the request. Click the **Entry Hint** link for additional information about completing the fields.
3. Click **Continue** to proceed to the *Request Letter Access Verification* page, or click **Cancel** to discard the request and return to the *Account Detail* page.
4. On the *Request Letter Access Verification* page (Figure 8-3), review the information displayed on the screen.

   Click **Continue** to submit the request and proceed to the *Request Letter Access Confirmation* page, or click **Cancel** to discard the request and return to the *Account Detail* page.
5. The *Request Letter Access Confirmation* page (Figure 8-4) displays after you click **Continue**.
6. Click **OK** to return to the *Account Detail* page.

You may now view this information on the *PPN Listing* page or *Demand Listing* page, as applicable.

Figure 8-2: Request Letter Access Page

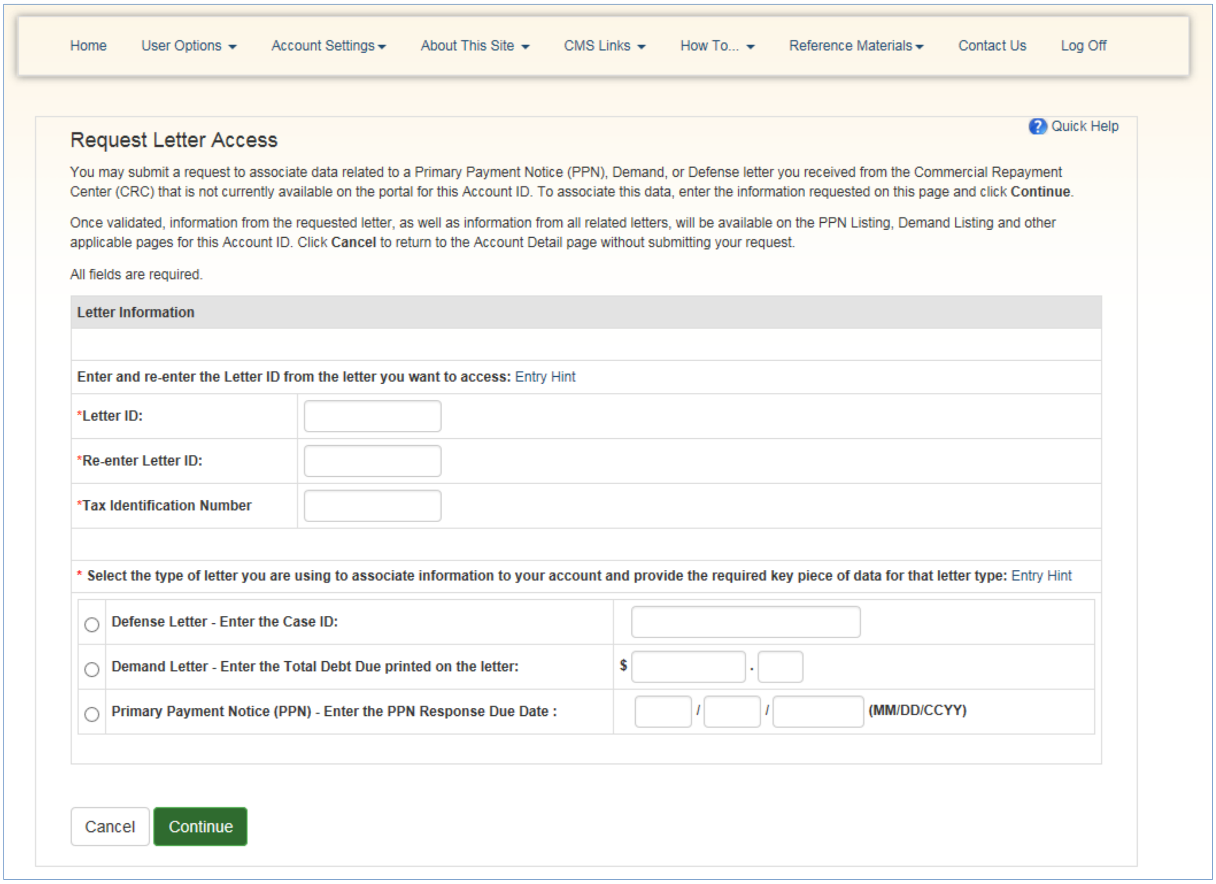


Table 8-2: Request Letter Access Page Fields

Field	Description
Letter Information	-
Letter ID	Enter the Letter ID. The Letter ID can be found in the upper left corner on Defense, Demand, or PPN letters in the “Regarding” section. This field always begins with an “86.” Click the **Entry Hint** link for additional information.
Re-enter Letter ID	Re-enter the Letter ID from the previous field for verification.
Tax Identification Number	Enter the 9-digit Tax Identification Number (TIN) corresponding to the TIN included in the letter.
Defense Letter	Enter the Case ID. This field is a 17-character, alpha-numeric field. If the Case ID begins with a “C” followed by a dash, include these characters when you key in the Case ID. No other special characters are allowed.

Field	Description
Demand Letter	Enter the Total Debt Due. You may enter dollars up to 9 digits (do not enter commas); include cents. Enter this amount exactly as it appears on your letter. Enter “00” in the cents field if there are no cents.
Primary Payment Notice (PPN) Letter	Enter the PPN Response Due Date, using two digits for the month, two for the day, and four for the year. The date must be valid and must be less than or equal to the current date + 45 calendar days. Spaces and letters are not allowed.
Cancel	This button deletes all entered information, cancels the *Request Letter Access* process, and returns you to the *Account Detail* page.
Continue	This button authenticates the information you entered, saves the information in the system, and takes you to the *Request Letter Access Verification* page.

Figure 8-3: Request Letter Access Verification Page

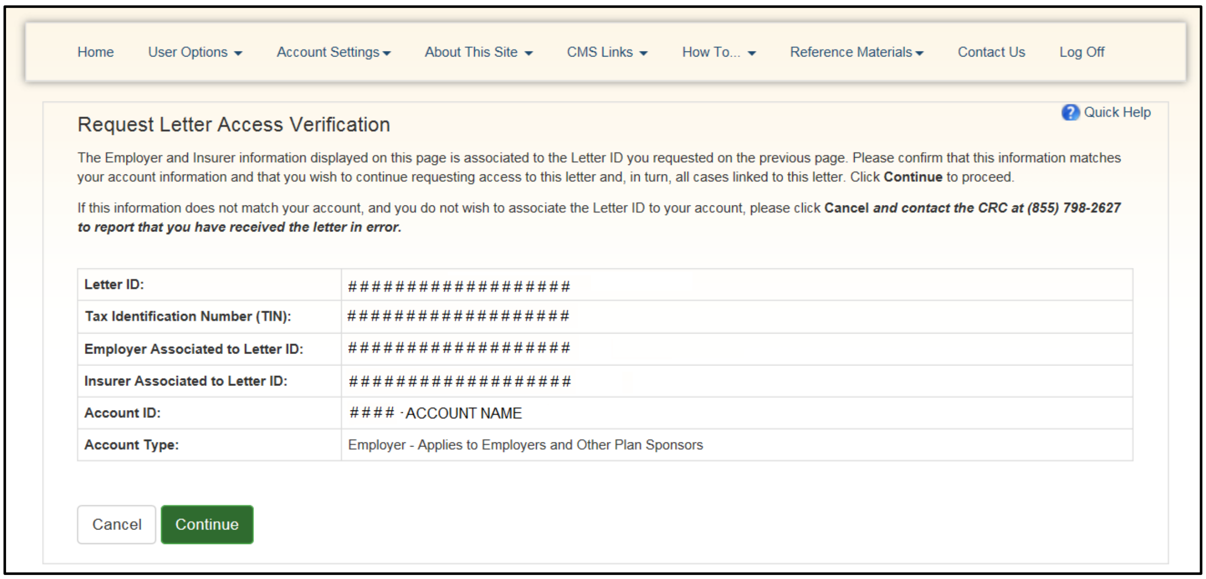
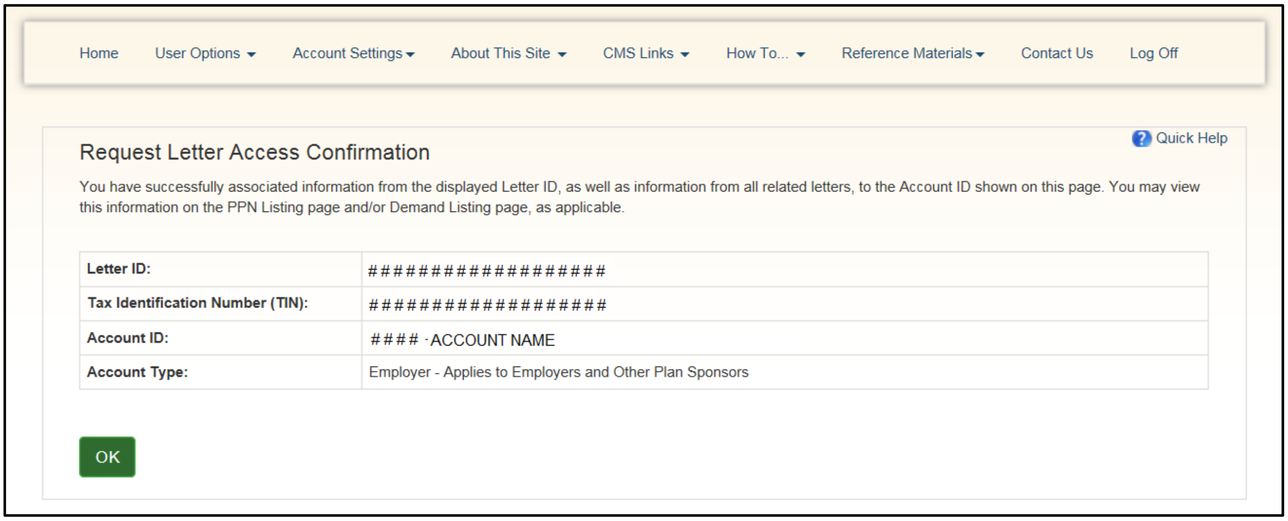


Table 8-3: Request Letter Access Verification Page Fields

Field	Description
Letter ID	Displays the Letter ID you entered on the previous page.
Tax Identification Number	Displays the 9-digit Tax Identification Number (TIN) corresponding to the TIN included in the letter.
Employer Associated to Letter ID	Displays the ID of the Employer associated to the letter ID.
Insurer Associated to Letter ID	Displays the ID of the Insurer associated to the letter ID.
Account ID	Displays the Account ID and company name of the account you are associating the letter to.
Account Type	Displays the type of account associated with the account you are associating the letter to.

Field	Description
Cancel	This button deletes all entered information, cancels the *Request Letter Access* process, and returns you to the *Account Detail* page.
Continue	This button authenticates the information you entered, saves the information in the system, and takes you to the *Request Letter Access Confirmation* page.

Figure 8-4: Request Letter Access Confirmation Page



8.5 Account Activity

The CRCP maintains a record of activities related to every Account ID. Certain activities are recorded and listed on the *Account Activity* page, including:

- PIN Request
- Account Setup
- Request Letter Access

The date the activity was completed and the Login ID of the user who completed the activity is saved.

To view account activity for an Account ID:

1. From the *Account Detail* page, select the **View Account Activity** link from the *Account Settings* drop-down menu on the navigation bar.

   The *Account Activity* page displays (Figure 8-5).

2. Click any column heading to sort by that column.

3. Click **Continue** to return to the *Account Detail* page.

Figure 8-5: Account Activity Page

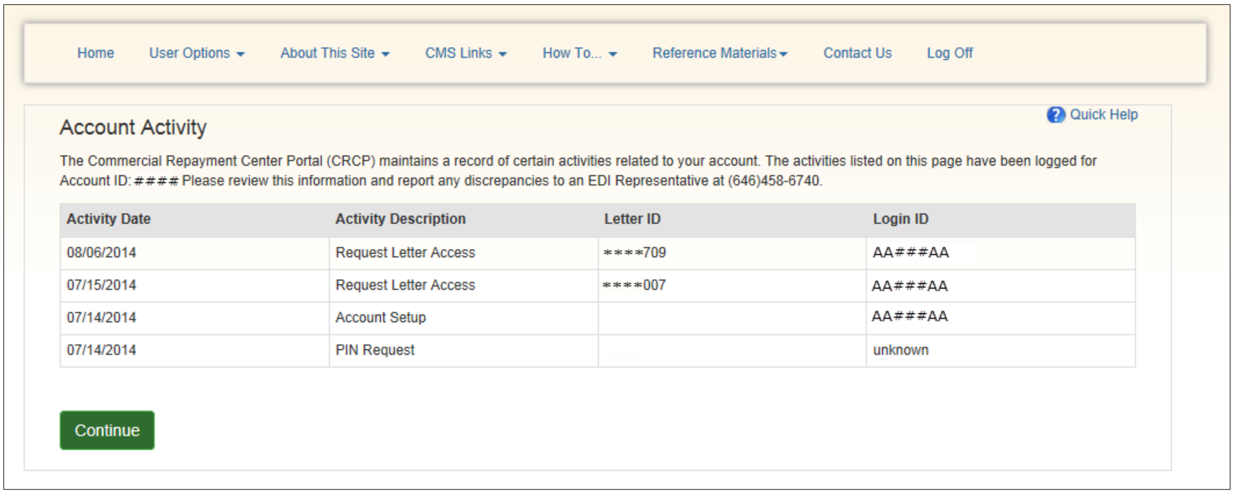


Table 8-4: Account Activity Page Fields

Field	Description
Activity Date	Displays the date the activity was completed.
Activity Description	Displays the type of activity. The available options include: • PIN Request • Account Setup • Request Letter Access AMs can see all three categories of activity; ADs will only see activities they performed.
Letter ID	Displays the Letter ID associated with the Request Letter Access activity.
Login ID	Displays the Login ID of the user who performed the activity.
Continue	This button takes you to the *Account Detail* page.

8.6 TINs Associated to Account IDs

Each Account ID can have one or more TINs associated with it. These TINs are available to view from the Account Listing page, or via the navigation bar on the *Account Details* page.

1. Click the **View TINs Listing** link in the same row as the Account ID on the *Account Listing* page. Or if you are on the *Account Details* page, look in the navigation bar for the *Account Settings* pull-down menu and click **View Associated TINs**.
2. The *TINs Associated to Account ID* page for the selected Account ID displays (Figure 8-6).
3. Click **Previous** to return to the *Account Listing* page.

Figure 8-6: TINs Associated to Account ID Page

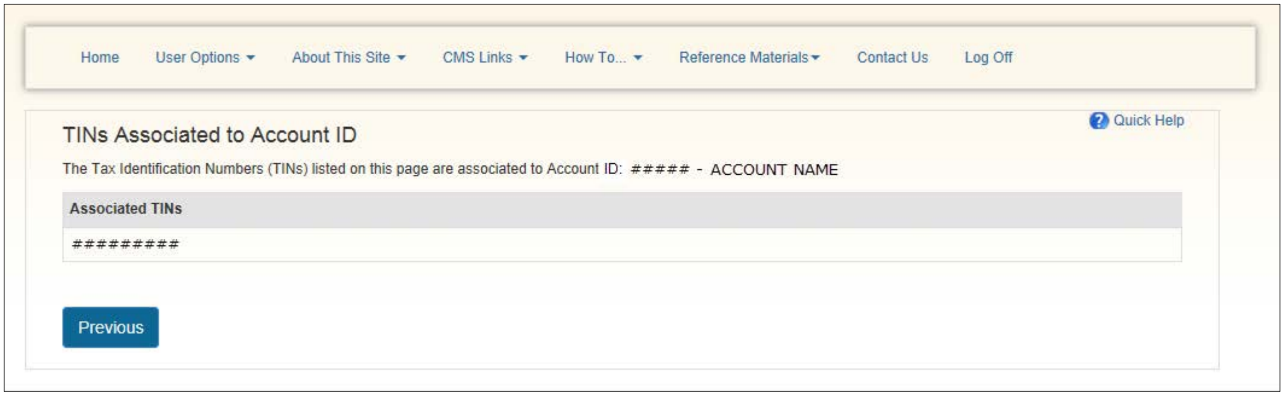


Table 8-5: TINs Associated to an Account ID Page Fields

Field	Description
Associated TINs	Displays all TINs that have been associated to the selected Account ID.
Previous	This button takes you to the *Account Listing* page.

Chapter 9: Managing Demands and Defenses for an Account ID

The CRCP allows you to view case information associated with Demand packages, and to submit defense documents for cases associated with a Demand package. Information related to incoming and outgoing correspondence at the case level is also available.

9.1 Demand Listing Page

The *Demand Listing* page is the starting point for viewing demand, defense, and case information. This page lists open demand IDs from the past three months.

The top section allows you to search for a specific demand letter ID (Section 9.1.1). The bottom *Demand Letters Issued to Companies Associated with Account ID* section displays the results of your search. The letters are displayed in descending order based on the date that displays in the *Letter Date* column. You can click any of the column headers to sort the list of demand letters by different criteria (*Viewed*, *Demand Letter ID*, *Number of Cases, Letter Date*, or *Demand Status*). You can use the demand letter ID hyperlinks to access additional details about a specific demand letter.

This page also helps you identify when new demand letters have been added to the account via the *Viewed* column. **Note**: When a new demand letter has been added, the Account Manager will be notified by email. The *Viewed* column initially displays **No** for new *Demand Letter IDs* that have been added to the account. **No** changes to **Yes** after clicking the *Demand Letter ID.* A blank in this column identifies demands that were added to the account prior to this functionality being added to the CRCP.

To access the *Demand Listing* page, click **Demand Listing** on the *Account Detail* page.

Figure 9-1: Demand Listing Page

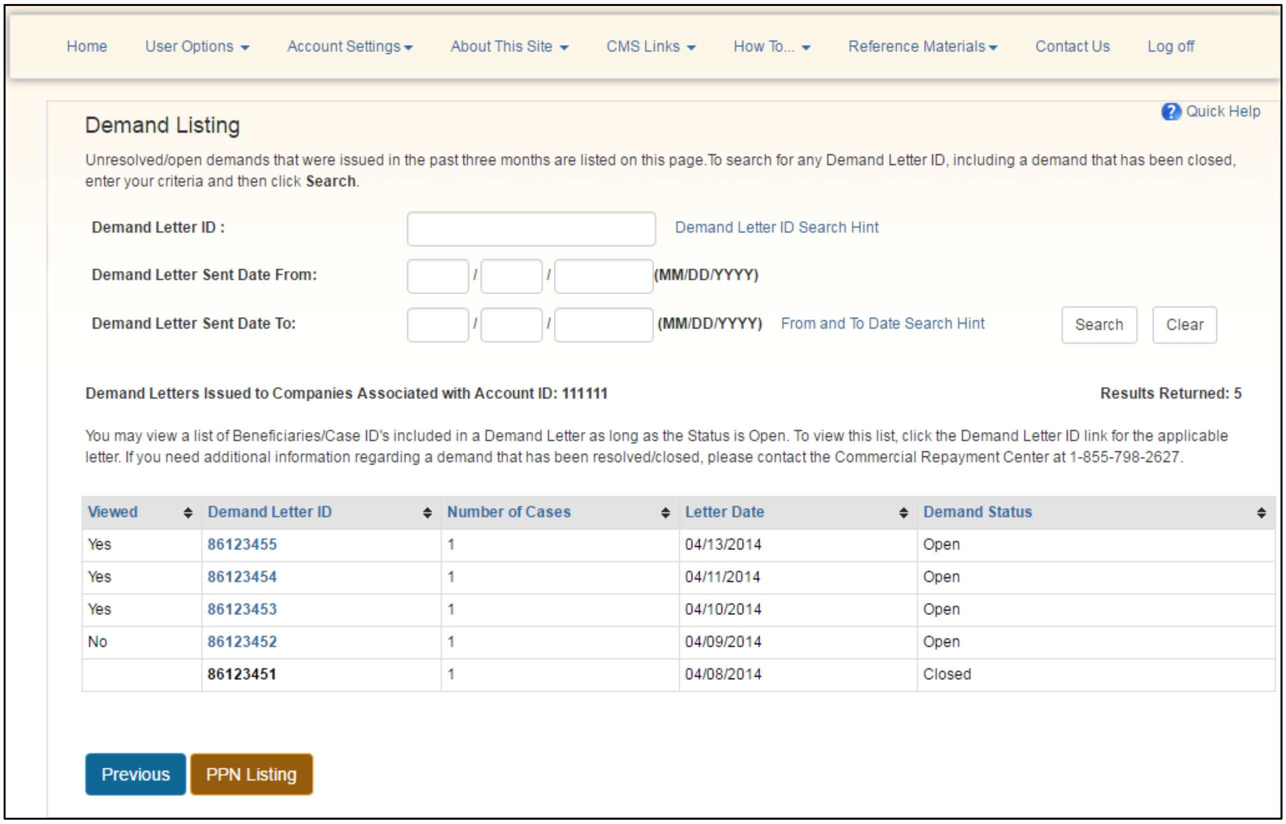


Table 9-1: Demand Listing Page Fields

Field	Description
Demand Listing Search	-
Demand Letter ID	Enter the Letter ID of the demand letter when conducting a search. The Demand Letter ID is an 8- or 9-digit number beginning with “86.” You may also search using a percent sign (%) as a wildcard after entering the first four characters of the demand letter ID. Click the **Demand Letter ID Search Hint** for details regarding search criteria.
Demand Letter Sent Date From	Enter a valid date that is less than or equal to the date entered in the *Demand Letter Sent Date To* field.
Demand Letter Sent Date To	Enter a valid date that is greater than or equal to the date entered in the *Demand Letter Sent Date To* field, and also less than or equal to the current date. To search for all letters sent on one specific date, enter the same date in both the *Demand Letter Sent Date From* field and the *Demand Letter Sent Date To* field. If no value is entered in this field, then the system will set the value equal to the current date. Click the **From and To Date Search Hint** hyperlink for details regarding search criteria.

Field	Description
Search	This button searches for demands that meet the criteria you entered in the fields above. Matching demand letters are displayed in the *Demand Letter Issued to Companies Associated with Account ID* section.
Clear	This button clears the data from the search fields above, and re-displays the original list of open demand letters sorted in descending order by letter date.
Search Results	-
Viewed	Identifies if the letter has been reviewed by a user. Values include: Yes – letter has been reviewed. No – letter has not been reviewed. Blank - letter was added to the account prior to this functionality being implemented.
Demand Letter ID	The Letter ID of the demand letter.
Number of Cases	Total number of cases associated with the demand letter ID.
Letter Date	Date of the letter.
Demand Status	Identifies the status of the demand. Values include: Open – indicates that the status of at least one case included in the demand is open. Closed – indicates that the status of each case included in the demand is closed.
Previous	This button returns you to the *Account Detail* page.
PPN Listing	This button takes you to the *PPN Listing* page (Section 10.2).

9.1.1 Demand Letter Search

To locate a specific demand letter, use the search fields on the *Demand Listing* page. You can search for a specific demand letter using the demand letter ID or the date the demand letter was sent. You can also search for a demand letter that was sent within a range of dates. Click the **From and To Date Search Hint** hyperlink for details regarding search criteria.

To search for a demand letter by demand letter ID:

1. Enter the demand letter ID in the *Demand Letter ID* field.
2. Click **Search**.

To search for a demand letter sent on a specific date:

1. Enter the same date in both the *Demand Letter Send Date From* and *Demand Letter Send Date To* fields.
2. Click **Search**.

To search for a demand letter sent within a range of dates:

1. Enter the range of dates in the *Demand Letter Sent Date From* and *Demand Letter Sent Date To* fields.

If you leave the and *Demand Letter Sent Date To* field blank, the search results will contain all demand letters sent from the *Demand Letter Sent Date From* to the current date.

2. Click **Search**.

For all searches, the search results will appear in the *Demand Letters Issued to Companies Associated with Account ID* section at the bottom of the *Demand Listing* page. By default, the results are displayed in descending order based on the date that displays in the *Letter Date* column.

Note: If there are over 100 demand letters returned when a search is performed, only the first 100 will be listed and you will receive a warning message. To reduce the number of records displayed, enter as much known criteria as possible and perform another search.

Table 9-1 describes the fields on the *Demand Listing* page, including field restrictions and use of wildcards.

9.2 Demand Letter Details

For open demands, clicking on the **Demand Letter ID** hyperlink takes you to the *Demand Detail* page.

9.2.1 The Demand Detail Page

The *Demand Detail* page (Figure 9-2) lists information pertaining to the selected demand letter in several sections. Table 9-2 describes the fields and buttons on the *Demand Detail* page.

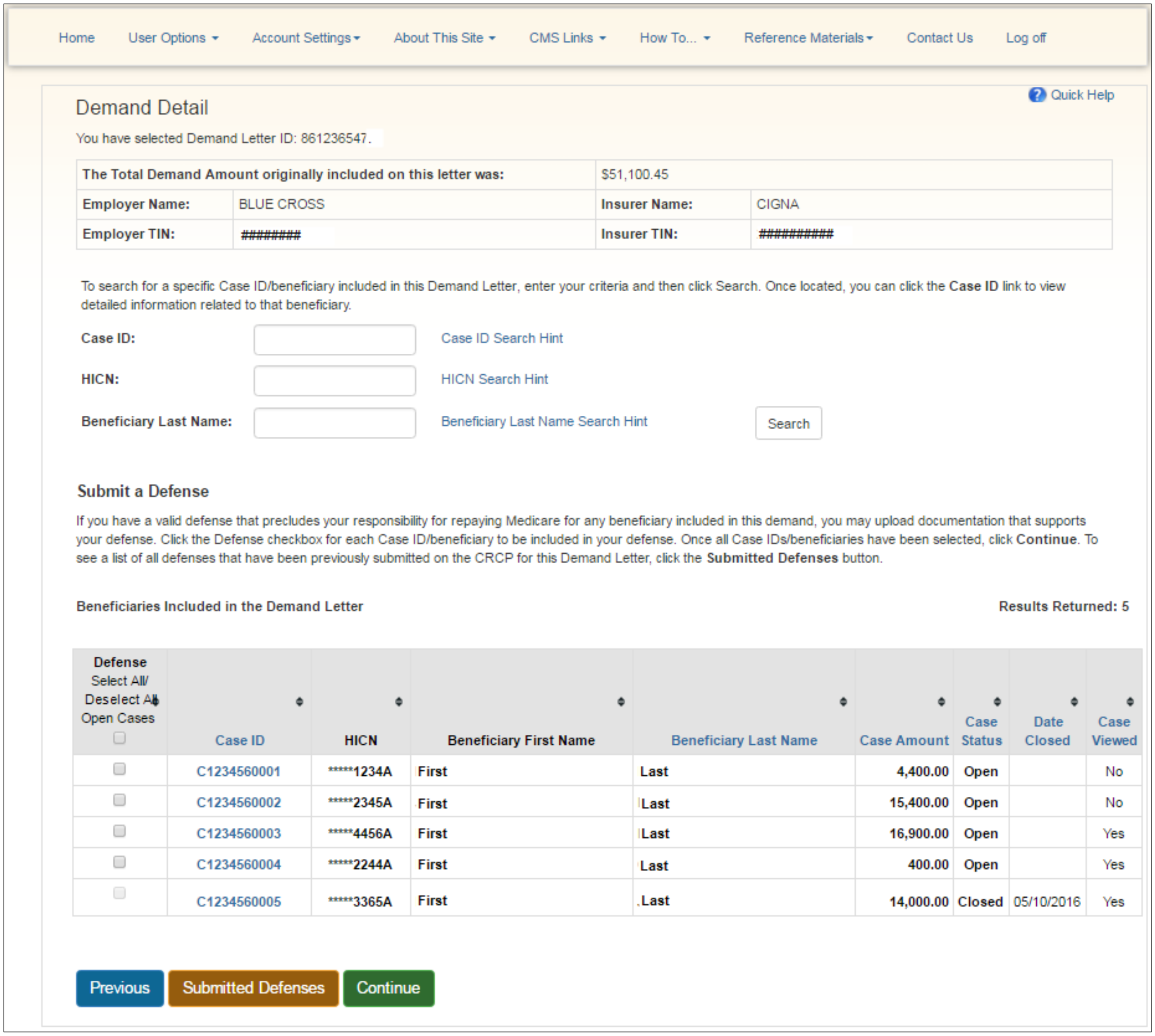
The top section of the page lists information about the demand itself, and includes the total debt due, the employer name and TIN, and the insurer name and TIN.

The middle section allows you to search for a case or beneficiary by using the Case ID, Health Insurance Claim Number (HICN), or beneficiary last name.

The lower section displays information related to beneficiaries and cases associated with the demand letter, including the HICN, beneficiary first and last name, the original case amount, Case ID, and case status of each case in the table. By default, the table is sorted by the *Case ID* column in descending order. You can click the *Case ID*, *Beneficiary Last Name*, *Case Amount*, *Case Status, Date Closed,* and *Case Viewed* column headers to sort the list of demand letters by different criteria. Table 9-3 describes the *Beneficiaries Included in the Demand Letter* table.

The bottom of the page includes navigation buttons that allow you to upload additional defense documentation and to view a list of previously submitted defense documents.

Figure 9-2: Demand Detail Page


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

Quick Help

Demand Detail

You have selected Demand Letter ID: 861236547.

The Total Demand Amount originally included on this letter was:		$51,100.45	
Employer Name:	BLUE CROSS	**Insurer Name:**	CIGNA
Employer TIN:	#########	**Insurer TIN:**	###########

To search for a specific Case ID/beneficiary included in this Demand Letter, enter your criteria and then click Search. Once located, you can click the **Case ID** link to view detailed information related to that beneficiary.

Case ID: Case ID Search Hint

HICN: HICN Search Hint

Beneficiary Last Name: Beneficiary Last Name Search Hint Search

Submit a Defense

If you have a valid defense that precludes your responsibility for repaying Medicare for any beneficiary included in this demand, you may upload documentation that supports your defense. Click the Defense checkbox for each Case ID/beneficiary to be included in your defense. Once all Case IDs/beneficiaries have been selected, click **Continue**. To see a list of all defenses that have been previously submitted on the CRCP for this Demand Letter, click the **Submitted Defenses** button.

Beneficiaries Included in the Demand Letter **Results Returned: 5**

Defense Select All/ Deselect All Open Cases	Case ID	HICN	Beneficiary First Name	Beneficiary Last Name	Case Amount	Case Status	Date Closed	Case Viewed
	C1234560001	*****1234A	First	Last	4,400.00	Open		No
	C1234560002	*****2345A	First	Last	15,400.00	Open		No
	C1234560003	*****4456A	First	Last	16,900.00	Open		Yes
	C1234560004	*****2244A	First	Last	400.00	Open		Yes
	C1234560005	*****3365A	First	Last	14,000.00	Closed	05/10/2016	Yes

Previous | Submitted Defenses | Continue

Table 9-2: Demand Detail Page Fields

Field	Description
Case ID	Enter the Case ID of the case when conducting a search. If the Case ID begins with a “C” followed by a dash, include these characters when you enter the Case ID. You may also search using a percent sign (%) as a wildcard at the end of the search term, after entering the first eight characters (no spaces) of the Case ID. Click the **Case ID Search Hint** hyperlink for details regarding search criteria.
HICN	Enter the HICN associated with the case or the beneficiary when conducting a search. You may also search using a percent sign (%) as a wildcard at the end of the search term, after entering the first four characters of the HICN. Click the **HICN Search Hint** hyperlink for details regarding search criteria.
Beneficiary Last Name	Enter the last name of the beneficiary you are searching for. You may also search using a percent sign (%) as a wildcard at the end of the search term, after entering the first character of the beneficiary’s last name. The beneficiary's last name must start with a letter and may only contain letters, an apostrophe (’), a hyphen (-), a space, or a wildcard (%). If a wildcard is used, it must be at the end of the search term. Click the **Beneficiary Last Name Search Hint** hyperlink for details regarding search criteria.
Search	This button searches for the case or beneficiary that meets the criteria you entered in the fields above. Matching records are displayed in the *Beneficiaries Included in the Demand Letter* section.
Previous	This button discards any changes and returns you to the *Demand Detail* page.
Submitted Defenses	This button takes you to the *Submitted Defense Documents* page. No selections are saved.
Continue	This button saves your selections and takes you to the *Upload Defense* page. This button is available after you select a beneficiary/case.

Table 9-3: Beneficiaries Included in the Demand Letter Table Fields

Field	Description
Defense	This column contains checkboxes to select one or more individual cases when uploading defense documentation. When uploading defense documentation, the document you upload is only associated to the case(s) that is (are) selected. You can select one or more cases per document upload.
Select All/De-select All	Selecting this checkbox (at the top of the *Defense* column) toggles between selecting and de-selecting every checkbox in the *Defense* column where the Case Status is Open.
Select/De-select individual case	Clicking checkboxes next to individual cases select only the checked cases.
Case ID	Displays the Case ID. For open cases, click the Case ID hyperlink to display the *Financial Summary* tab on the *Case Information* page.
HICN	Displays the HICN associated with the case. The first 5 characters are masked.
Beneficiary First Name	Displays the first name of the beneficiary on the case.
Beneficiary Last Name	Displays the last name of the beneficiary on the case.
Case Amount	Displays the original dollar amount of the case.
Case Status	Displays the status of the case. When the Case Status is set to Closed, the checkbox in the *Defense* column is disabled.
Date Closed	Date the case was closed.
Case Viewed	Displays **Yes** or **No** to indicate if the case has been viewed after a particular search or after logging into a new session.

9.2.2 Information Related to the Demand

From the *Demand Detail* page, you can navigate to the following pages to access additional information and functions related to the demand:

- To search for a specific case or beneficiary related to the demand, use the search fields on the *Demand Detail* page. Section 9.2.3 provides additional information about searching.
- To view defense documents previously submitted via the portal, click the **Submitted Defenses** button. Section 9.3.1 provides additional information about submitted defense documentation.
- To upload defense documentation for this demand, click the **Continue** button. Section 9.4 provides additional information about uploading defense documentation.
- To view case information, click the hyperlinked **Case ID** in the case listing table. Section 9.5 provides additional information about the *Case Information* page.

9.2.3 Case ID or Beneficiary Search

To locate a specific demand letter ID, use the search fields on the *Demand Detail* page. You can search for a specific case or beneficiary using the Case ID, HICN, or the beneficiary's last name.

To search for a case or beneficiary by case ID:

1. Enter the Case ID in the *Case ID* field.
2. Click **Search**.

To search for a case or beneficiary by HICN:

1. Enter the HICN in the *HICN* field.
2. Click **Search**.

To search for a case or beneficiary by the beneficiary's last name:

1. Enter the last name of the beneficiary in the *Beneficiary Last Name* field.
2. Click **Search**.

For all searches, the search results will appear in the *Beneficiaries Included in the Demand Letter* section at the bottom of the *Demand Detail* page. By default, the results are ordered by the *Case ID* column in descending order. The results of your search will continue to display when you transfer to the *Case Information* page to view information for a specific beneficiary and then return to the *Demand Detail* page using the **Previous** button. The same results will continue to display until a new search is performed or you return to the *Demand Listing* page.

Table 9-2 describes the fields on the *Demand Detail* page, including field restrictions and use of wildcards.

9.3 Defense History

For each demand, you can view a list of defenses that have been submitted. The CRCP allows you to view the filename, submission information, and cases/beneficiaries associated to each defense file submitted via the portal. You cannot view the file itself once it has been uploaded and submitted to the CRCP.

9.3.1 Submitted Defense Documents Page

The *Submitted Defense Documents* page (Figure 9-3) lists all defenses submitted for the selected demand letter. This page also allows you to search for a specific defense document, and view beneficiaries and Case IDs associated to a defense document.

The Demand Letter ID displays at the top of the page.

The next section of the page allows you to search for a specific defense document. You can search by filename, by user who submitted the document, or by the date range in which the document was submitted.

The final section displays a list of submitted defense documents for the current demand ID. The list includes the file name, date submitted, the Login ID of the user who submitted the document, and additional case and beneficiary information. The list of submitted defense documents on the *Submitted Defense Documents* page appears in descending order by Submitted Date. You can click the *File Name*, *Submitted Date*, *Submitted By* column headers to sort the list of defense documents by different criteria describes the case listing table.

On the *Submitted Defense Documents* page, you can search for previously submitted defense documents on the CRCP by the file name, the user who submitted the defense document, or the date or dates when the file was submitted.

To search for a defense document by file name:

1. Enter the file name of the defense document in the *File Name* field. You can enter a wildcard character (the percent sign, %) after you enter at least seven characters of the file name.
2. Click **Search**.

To search for a defense document by the user who submitted the document:

1. Enter the user's Login ID in the *Submitted By* field. You can enter a wildcard character (the percent sign, %) after you enter at least four characters of the Login ID.
2. Click **Search**.

To search for a defense document uploaded within a range of dates:

1. Enter the range of dates in the *Submitted Date From* and *Submitted Date To* fields.

   If you leave the *Submitted Date To* field blank, the search results will contain all defense documents uploaded through the current date.
2. Click **Search**.

For all searches, the search results will appear in the *Defense Documents* section at the bottom of the *Submitted Defense Documents* page. By default, the results are ordered by the date of file submission in descending order.

Table 9-4 describes the search fields on the *Submitted Defense Documents* page, including field restrictions and use of wildcards.

Figure 9-3: Submitted Defense Documents Page

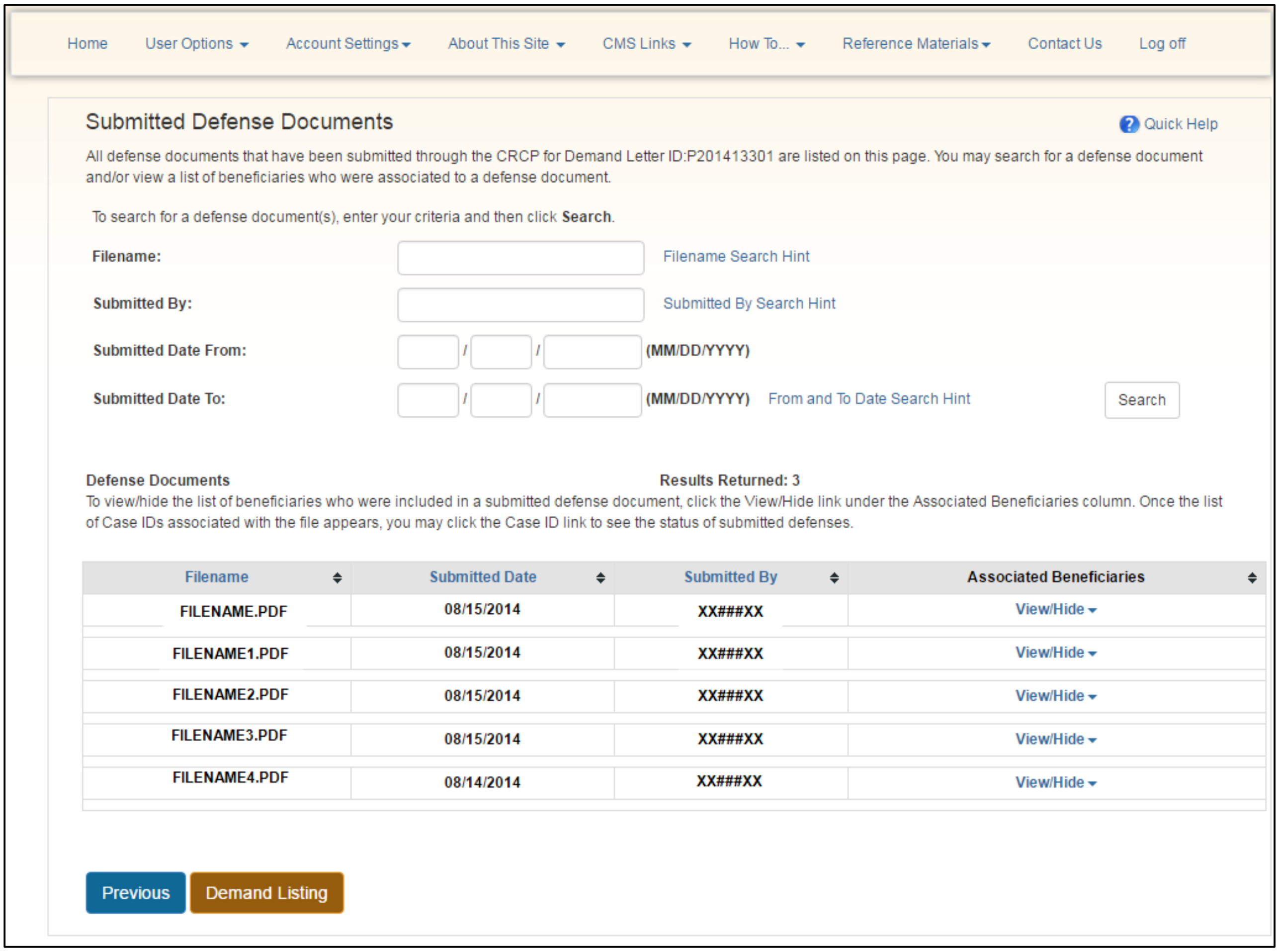


Table 9-4: Submitted Defense Documents Page Fields

Field	Description
Filename	Enter the filename of the defense letter when conducting a search. You may also search using a percent sign (%) as a wildcard after entering the first seven characters of the file name. Click the **Filename Search Hint** hyperlink for details regarding search criteria.
Submitted By	Enter the Login ID of the person who submitted the defense document. You may also search using a percent sign (%) as a wildcard after entering the first four characters of the person who submitted the file. Click the **Submitted By Search Hint** hyperlink for details regarding search criteria.
Submitted Date From	Enter a valid date that is less than or equal to the date entered in the *Submitted Date To* field.

Field	Description
Submitted Date To	Enter a valid date that is greater than or equal to the date entered in the *Submitted Date From* field, and also less than or equal to the current date. To search for all letters sent on one specific date, enter the same date in both the *Submitted Date From* field and the *Submitted Date To* field. If no value is entered in this field, then the system will set the value equal to the current date. Click the **From and To Date Search Hint** hyperlink for details regarding search criteria.
Search	This button searches for defense documents that meet the criteria you entered in the fields above. Matching defense filenames are displayed in the *Defense Documents* section of this page.
View/Hide	This link toggles between displaying and hiding the list of beneficiaries who were included in a submitted defense document. Click once to display the *All Case IDs Associated With File Name* table for the defense letter, and click again to hide it. See Section 9.3.2.
Demand Listing	This button transfers you to the *Demand Listing* page.
Previous	This button returns you to the *Demand Detail* page.

9.3.2 Beneficiaries Included in a Defense

Beneficiaries included in a defense are listed in the *All Case IDs Associated With Filename* section (Figure 9-4) on the *Submitted Defense Documents* page. To display the information for a specific defense document, click the **View/Hide** hyperlink in the *Associated Beneficiaries* column for that defense document. Information displayed in the *All Case IDs Associated With File Name* section is unique to each defense document.

The *All Case IDs Associated With File Name* section also displays the hyperlinked Case ID as well as additional information about the beneficiary. Table 9-5 describes the data that is populated in this section.

Figure 9-4: Submitted Defense Documents Page with "All Case IDs Associated With File Name" Section

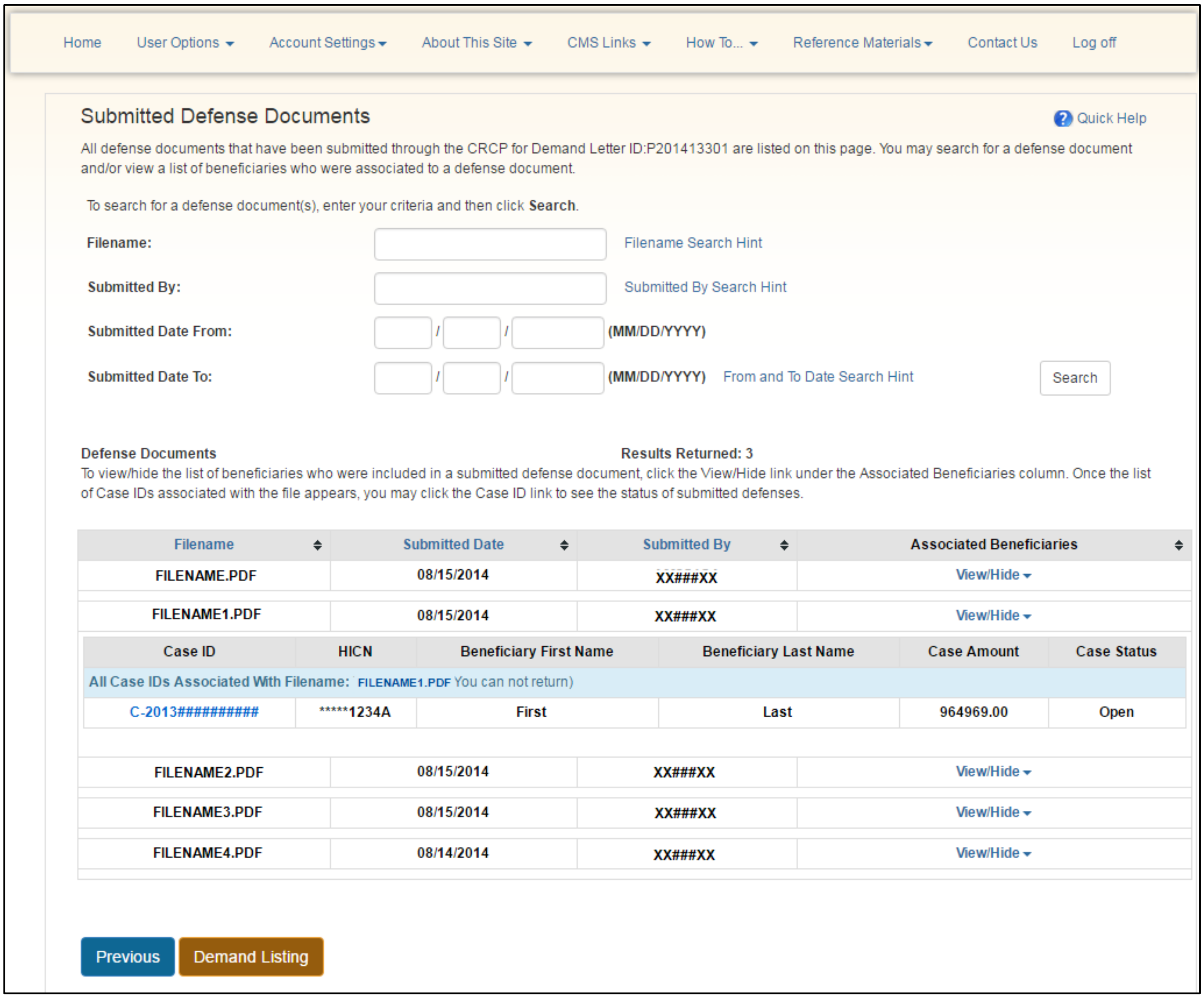


Table 9-5: All Case IDs Associated With File Name Table Fields

Field	Description
Case ID	Displays the Case ID as a hyperlink associated with a file name. Click the hyperlink to display the *Case Information* page for that Case ID.
HICN	Displays the HICN associated with the case. The first 5 characters of the HICN are masked.
Beneficiary First Name	Displays the first name of the beneficiary on the case.
Beneficiary Last Name	Displays the last name of the beneficiary on the case.
Case Amount	Displays the original dollar amount of the case.
Case Status	Displays the status of the case.

9.3.3 Status of a Demand

Once all of the cases associated to submitted defense documents are changed to “Closed” status, then the status of the demand letter ID is changed to “Closed” status as well. The status of a case appears on the *Demand Detail* (Section 9.2), *Submitted Defense Documents* (Section 9.3.1), and *Case Information* (Section 9.5) pages. The demand letter ID status appears on the *Demand Listing* page.

> **Note:** Once a demand letter ID is changed to “Closed” status, the hyperlink on the *Demand Listing* page is disabled. This occurs when ALL of the individual cases associated with that demand letter ID are moved to “Closed” status.

Demand letters and cases can be in either “Open” status or “Closed” status:

- For a demand letter ID in “Open” status, you can upload defense documents, view submitted defenses, and view case information.
- For a demand letter ID in “Closed” status, you can neither upload defense documents nor view defenses.

9.4 Defense Document Upload

The CRCP allows you to upload documentation in defense of a case(s) included on a demand letter ID. Documents can be uploaded in defense of one or more beneficiaries associated to the current Demand Letter ID.

When uploading defense documentation, you can only upload one file at a time. You can associate the file to multiple beneficiaries. All beneficiaries you associate the file to must already be included on the same demand letter ID.

Any file you upload must meet the following criteria:

- File is in .PDF or .TIF format.
- File is virus free.
- File size is less than or equal to 40 MB (megabytes).
- File name only includes the following alphanumeric characters: any letter (A-Z, a-z), any number (0-9), and any of the following special characters: hyphen (-), period (.) and underscore (_).
- File name does not include spaces.
- File name is 80 characters or less.

9.4.1 Upload Defense Page

The *Upload Defense* page (Figure 9-5) allows you to upload a document in defense of a case included on a demand. You must select at least one beneficiary on the *Demand Detail* page and click **Continue** to reach this page.

The top section of this page displays the demand information. This information is displayed in read-only format, and includes the demand letter ID, the demand amount, the employer name and TIN, and the insurer name and TIN.

The next section displays the beneficiaries and cases that were selected on the *Demand Detail* page prior to clicking the **Continue** button.

The bottom section allows you to browse, upload, review, and submit the defense document. Once the file has been uploaded, but before it is submitted, this section also displays the filename.

Figure 9-5: Upload Defense Page

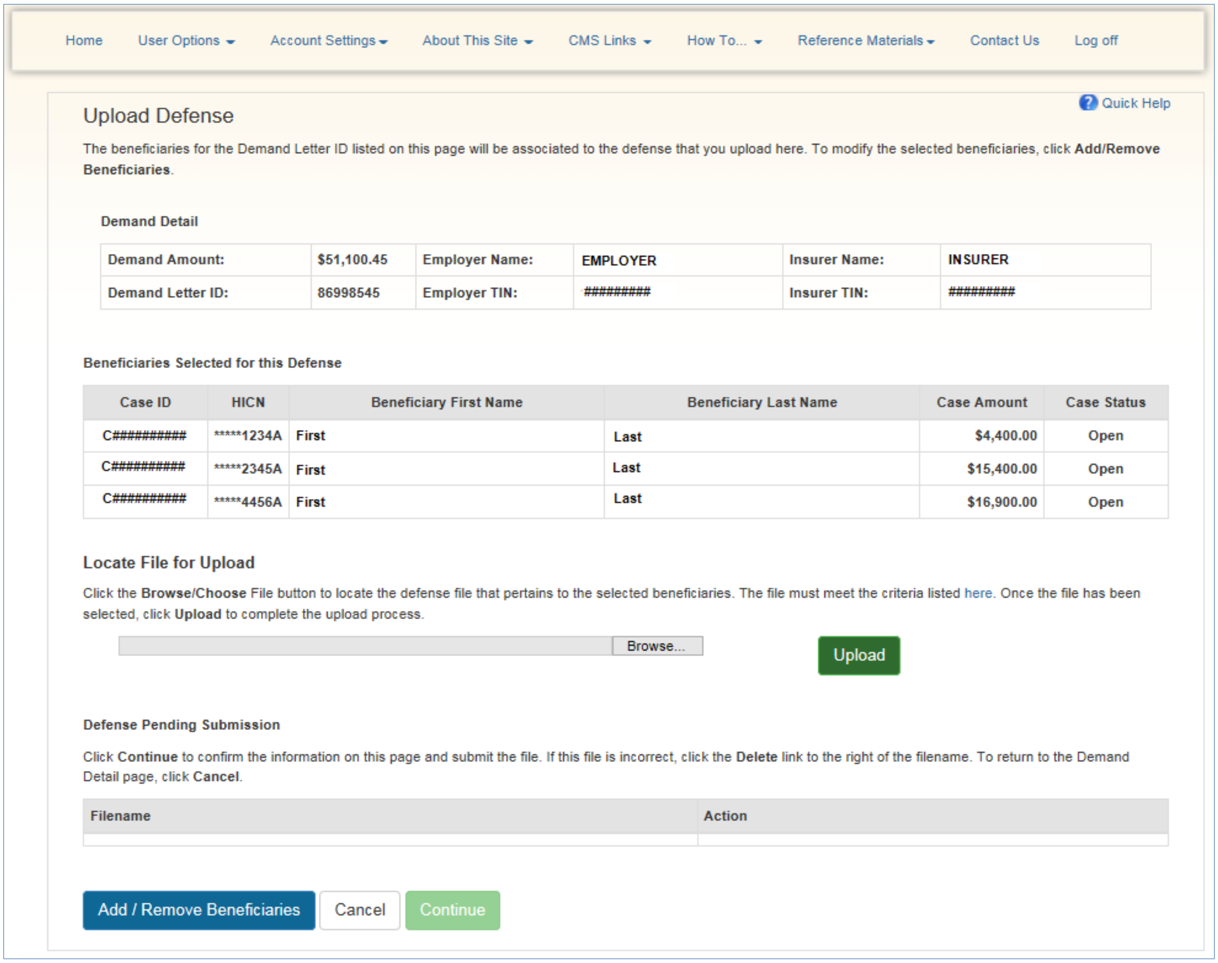


Table 9-6: Upload Defense Page Fields

Field	Description
Browse/Choose File	This button allows you to select files on your system to upload to the CRCP. This button is disabled if there is a pending file upload.
Upload	This button uploads the selected file to the CRCP. Uploading does NOT submit the file, and cancelling after upload discards the upload. This button is disabled if there is a pending file upload.
Delete	This link deletes the given file with no confirmation page.
Add/Remove Beneficiaries	This button returns you to the *Demand Detail* page. You can then select additional cases (beneficiaries) (or de-select existing choices) to associate with the file you are uploading.
Cancel	This button displays the *Upload Defense Cancel Confirmation* page. From the *Upload Defense Cancel Confirmation* page, click **Cancel** to exit and return to the *Upload Defense* page, or click **Continue** to discard the selected file and return to the *Demand Detail* page.

Field	Description
Continue	This button saves your changes and displays the *Review and Submit Defense* page. This button is disabled if no file has been selected for upload.

9.4.2 Defense Document Upload Steps

To Upload a Defense Document:

1. On the *Demand Detail* page, select the **Defense** checkbox for one or more beneficiaries or cases (Figure 9-6).

   The file you upload in this process will be associated to ALL beneficiaries or cases you select.
2. Click **Upload Documentation**.
3. The *Upload Defense* page displays.
4. Click **Browse…**, and select a file stored on your computer for submission.

   Note: Browse... and **Upload** buttons are not available when there is a file pending upload. The file name and extension appear in the *Defense Pending Submission* section of the *Upload Defense* page (Figure 9-5).
5. Click **Upload** to upload the file to the CRCP system.

   Note: File upload may take several minutes to complete.
6. Click **Continue** to go to the *Review and Submit Defense* page.

   Alternatively, you can click:
   - **Add/Remove Beneficiaries** to return to the *Demand Detail* page. There you can select new beneficiaries to associate, or de-select existing selections, without losing the document you have selected for upload.
   - **Cancel** to display the *Upload Defense Cancel Confirmation* page. From this page, click:
     - **Cancel** to return to the *Upload Defense* page with the uploaded file intact.
     - **Continue** to discard the file you have uploaded and return to the *Demand Detail* page.
   - **Delete** to remove the uploaded file and re-display the *Upload Defense* page without the uploaded file. This link has no confirmation page: your document will not be saved in the system.

   The *Review and Submit Defense* page (Figure 9-8) displays, showing details about the demand, the beneficiaries or cases that were selected to be associated with the defense file, and the defense filename that is pending submission.
7. On the *Review and Submit Defense* page, click **Continue** to continue to the *Defense Submission Confirmation* page. Clicking **Continue** also submits the file, and associates it to the demand letter and beneficiaries (cases) you selected.

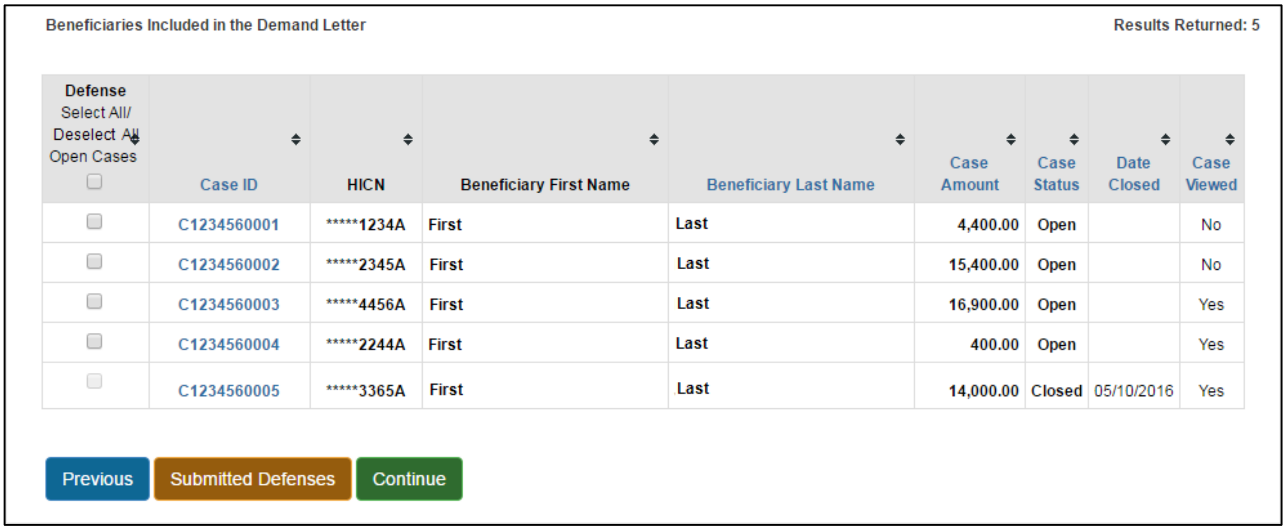
   After clicking **Continue**, you can view the document name on the *Submitted Defenses* page, and on the *Submitted Documents* tab on the *Case Information* page.

   Alternatively, you can click:
   - **Previous** to return to the *Upload Defense* page with the file still present and submission pending.

- **Cancel** to display the *Upload Defense Cancel Confirmation* page. This page provides you with the opportunity to confirm that you do not want to submit the uploaded file by clicking **Continue** or allows you to return to the *Review and Submit Defense* page to submit your file after all.

On the *Defense Submission Confirmation* page (Figure 9-10), review the displayed information for your records. Click **OK** to return to the *Demand Detail* page.

Figure 9-6: Beneficiaries Included in the Demand Letter


Beneficiaries Included in the Demand Letter Results Returned: 5

Defense Select All/ Deselect All Open Cases	Case ID	HICN	Beneficiary First Name	Beneficiary Last Name	Case Amount	Case Status	Date Closed	Case Viewed
	C1234560001	*****1234A	First	Last	4,400.00	Open		No
	C1234560002	*****2345A	First	Last	15,400.00	Open		No
	C1234560003	*****4456A	First	Last	16,900.00	Open		Yes
	C1234560004	*****2244A	First	Last	400.00	Open		Yes
	C1234560005	*****3365A	First	Last	14,000.00	Closed	05/10/2016	Yes

Table 9-7: Beneficiaries Included in the Demand Letter Fields

Field	Description
Defense	This column contains checkboxes to select one or more individual cases when uploading defenses documentation. Any defense document you upload is only associated to the case(s) that you select there. You can select one or more cases per document upload.
Select/Deselect All Open Cases	Selecting this checkbox (at the top of the *Defense* column) toggles between selecting and de-selecting every checkbox in the *Defense* column where the Case Status is Open.
Select/Deselect individual case	Click these checkboxes to select or de-select individual cases.
Case ID	Displays the Case ID.
HICN	Displays the Health Insurance Claim Number associated to the case. The first 5 characters are masked.
Beneficiary First Name	Displays the first name of the beneficiary associated to the case.
Beneficiary Last Name	Displays the last name of the beneficiary associated to the case.
Case Amount	Displays the dollar amount associated to the case.
Case Status	Displays the status of the case. When the Case Status is set to "Closed," the checkbox in the *Defense* column is disabled.
Previous	This button returns you to the *Demand Listing* page.
Submitted Defenses	This button takes you to the *Submitted Defense Documents* page.

Field	Description
Continue	This button takes you to the *Upload Defense* page if at least one Defense checkbox is selected.

Figure 9-7: Defense Pending Submission

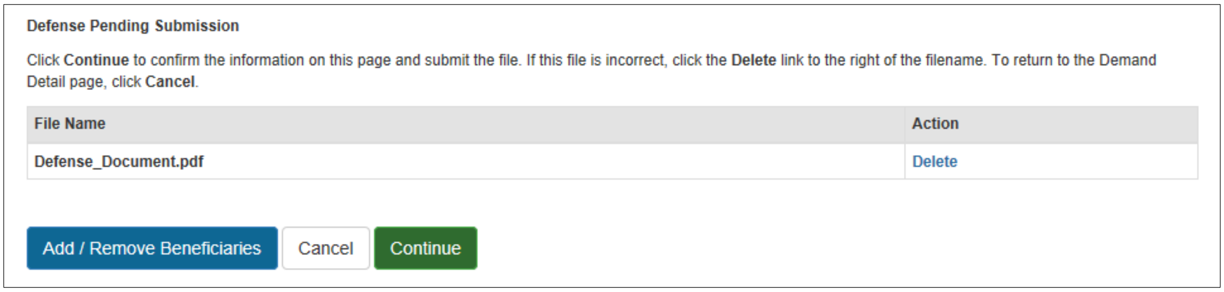


Table 9-8: Defense Pending Submission Section Fields

Field	Description
Delete	This link deletes the given file with no confirmation page.
Add/Remove Beneficiaries	This button returns you to the *Demand Detail* page. You can then select additional cases (beneficiaries) (or de-select existing choices) to associate with the file you are uploading.
Cancel	This button displays the *Upload Defense Cancel Confirmation* page. From the *Upload Defense Cancel Confirmation* page, click **Cancel** to exit and return to the *Upload Defense* page, or click **Continue** to discard the selected file and return to the *Demand Detail* page.
Continue	This button displays the *Review and Submit Defense* page. This button is disabled if no file has been selected for upload.

Figure 9-8: Review and Submit Defense Page

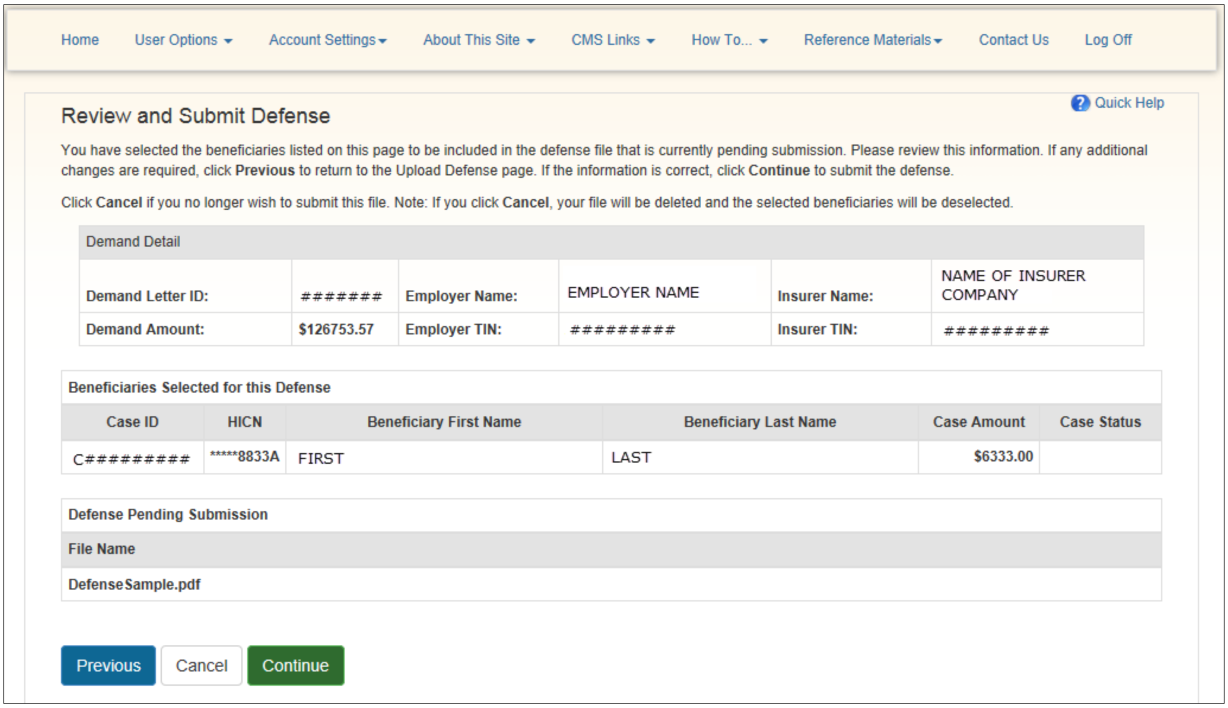


Table 9-9: Review and Submit Defense Page Fields

Field	Description
Demand Detail	-
Demand Letter ID	Displays the Demand Letter ID to be associated with the defense file being uploaded.
Demand Amount	Displays the amount of the demand.
Employer Name	Displays the name of the employer.
Employer TIN	Displays the Tax Identification Number of the employer.
Insurer Name	Displays the name of the insurer.
Insurer TIN	Displays the Tax Identification Number of the insurer.
Beneficiaries Selected for This Defense	-
Case ID	Displays the Case ID.
HICN	Displays the Health Insurance Claim Number associated to the case.
Beneficiary First Name	Displays the first name of the beneficiary associated to the case.
Beneficiary Last Name	Displays the last name of the beneficiary associated to the case.
Case Amount	Displays the original dollar amount associated to the case.
Case Status	Displays the status of the case.
Previous	This button displays the *Upload Defense* page and maintains the uploaded file.

Field	Description
Cancel	This button displays a *Cancel Confirmation* page. If you click **Continue** there, the CRCP discards any file you have uploaded and displays the *Demand Detail* page.
Continue	This button displays the *Defense Submission Confirmation* page. Clicking **Continue** also submits the file and associates it to the demand letter and beneficiaries (cases) you selected. After clicking **Continue**, you can view the document name on the *Submitted Defenses* page, and on the *Submitted Documents* tab on the *Case Information* page.

Figure 9-9: Upload Defense Cancel Confirmation Page

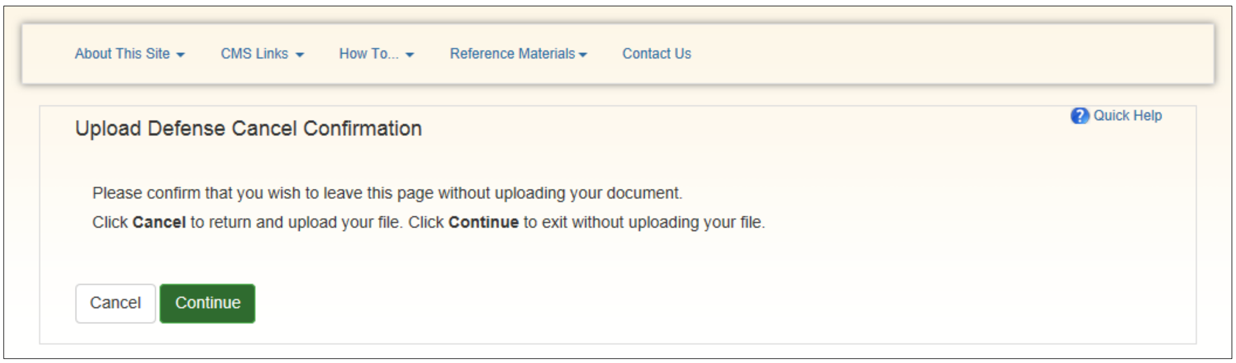
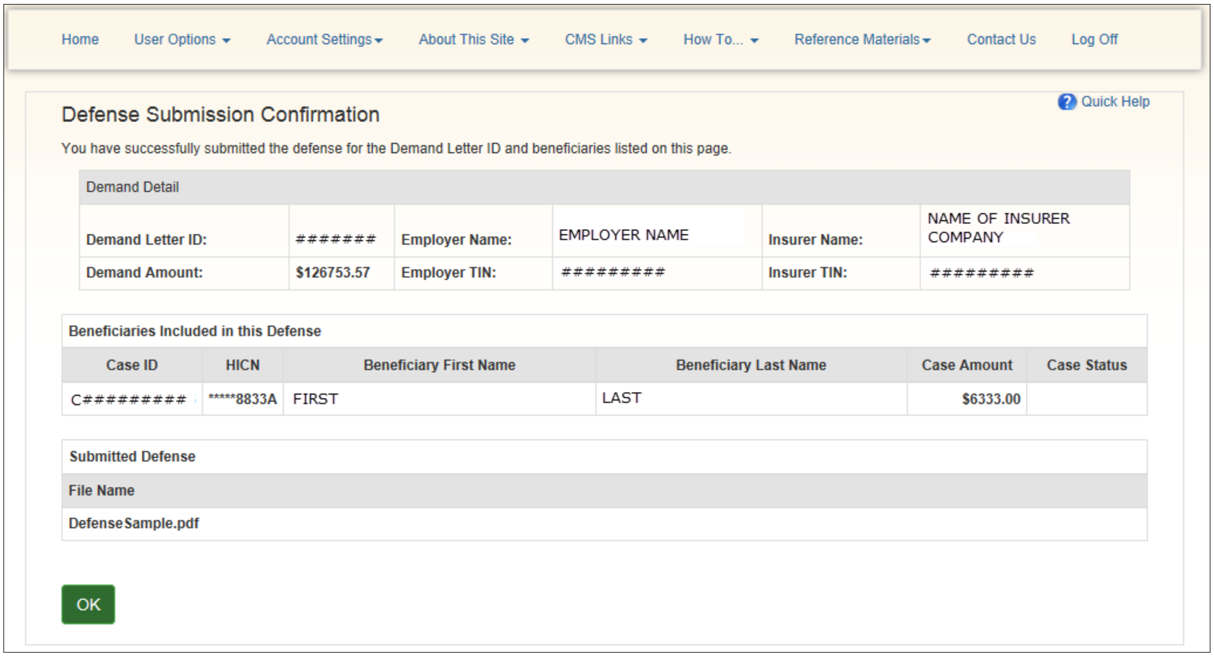


Table 9-10: Upload Defense Cancel Confirmation Page Fields

Field	Description
Cancel	This button returns you to the *Review and Submit Defense* page.
Continue	This button takes you to the *Demand Detail* page, without saving your uploaded document.

Figure 9-10: Defense Submission Confirmation Page



9.5 Case Information and History

The *Case Information* page (Figure 9-11) displays information about an individual case.

You can access the *Case Information* page by:

- Clicking a hyperlinked Case ID on the *Demand Detail* page
- Clicking a hyperlinked Case ID on the *Submitted Defense Documents* page after you click the **View/Hide** hyperlink to display the *All Case IDs Associated With Filename* section

The top section of the Case Information page displays information about the case and the associated beneficiaries, insurer, and employer on the case.

The lower section includes the following four tabs that provide additional details:

- *Financial Summary* tab
- *Letter Activity* tab
- *Defense History* tab
- *Submitted Documents* tab

The *Financial Summary* tab usually displays when the *Case Information* page opens. Accessing this page from the *Submitted Documents* page displays the *Defense History* tab instead.

You can click on any tab to display its contents. You can also click **Previous** to return to the *Demand Detail* page. Click **Demand Listing** to transfer to the *Demand Listing* page.

Note: All information displayed on the *Case Information* page, and on all of its tabs, is in read-only format.

Figure 9-11: Case Information Page

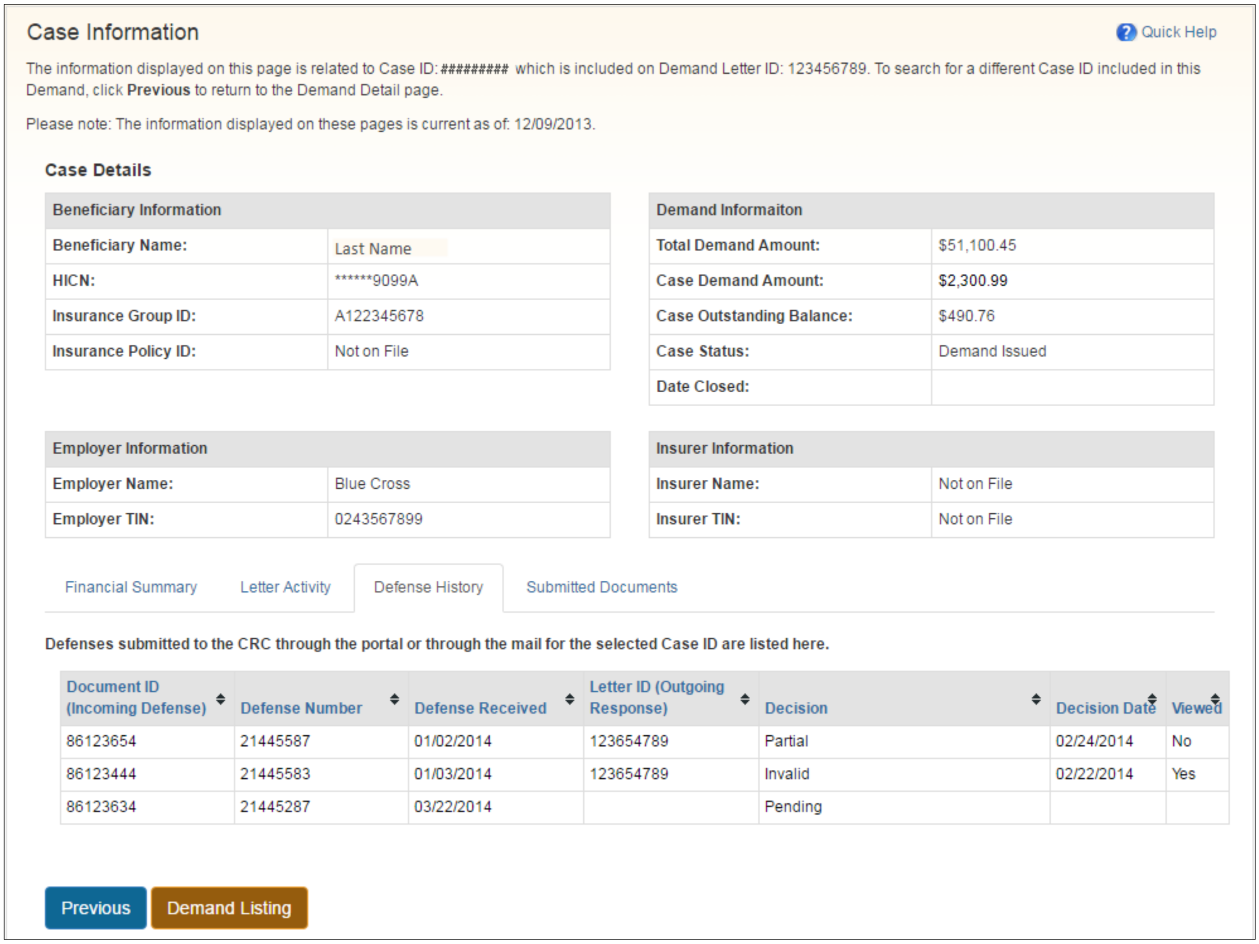


Table 9-11: Case Information Page Fields

Field	Description
Beneficiary Information	-
Beneficiary Name	Displays the name of the beneficiary on the case.
HICN	Displays the Health Insurance Claim Number on the case. The first 5 characters of the HICN are masked.
Insurance Group ID	Displays the insurance group ID associated to the Case ID.
Insurance Policy ID	Displays the insurance policy ID associated to the Case ID.
Demand Information	-
Total Demand Amount	Displays the total demand amount from the Demand Letter with which the current Case ID is associated.
Case Demand Amount	Displays the total demand amount associated to the Case ID.
Case Outstanding Balance	Displays the outstanding balance associated to the case.
Case Status	Displays the current status of the case.

Field	Description
Date Closed	Date the case was closed.
Employer Information	-
Employer Name	Displays the name of the employer associated to the case.
Employer TIN	Displays the Tax Identification Number of the employer associated to the case.
Insurer Information	-
Insurer Name	Displays the name of the insurer associated to the case.
Insurer TIN	Displays the Tax Identification Number of the insurer associated to the case.
Financial Summary	Click this tab to display the *Financial Summary* tab.
Letter Activity	Click this tab to display the *Letter Activity* tab.
Defense History	Click this tab to display the *Defense History* tab.
Submitted Documents	Click this tab to display the *Submitted Documents* tab.
Previous	This button displays the *Demand Detail* page.
Demand Listing	This button transfers you to the *Demand Listing* page.

9.5.1 Financial Summary Tab

The *Financial Summary* tab displays read-only financial information on file for the selected Case ID.

Figure 9-12: Financial Summary Tab

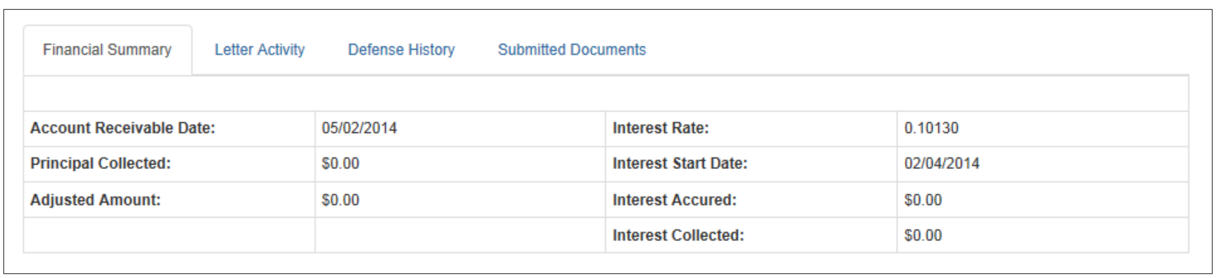


Table 9-12: Financial Summary Tab Fields

Field	Description
Account Receivable Date	Displays the account receivable date for the selected Case ID.
Principal Collected	Displays the principal collected for the selected Case ID.
Adjusted Amount	Displays the adjusted amount for the selected Case ID.
Interest Rate	Displays the interest rate for the selected Case ID.
Interest Start Date	Displays the interest start date for the selected Case ID.
Interest Accrued	Displays the interest accrued for the selected Case ID.
Interest Collected	Displays the interest collected for the selected Case ID.

9.5.2 Letter Activity Tab

The *Letter Activity* tab displays a read-only history of correspondence sent to and from the CRC for the case.

> **Note:** Information in the *Date Received at CRC* and *Date Sent from the CRC* columns may be different than date(s) your company sent or received the correspondence.

Figure 9-13: Letter Activity Tab

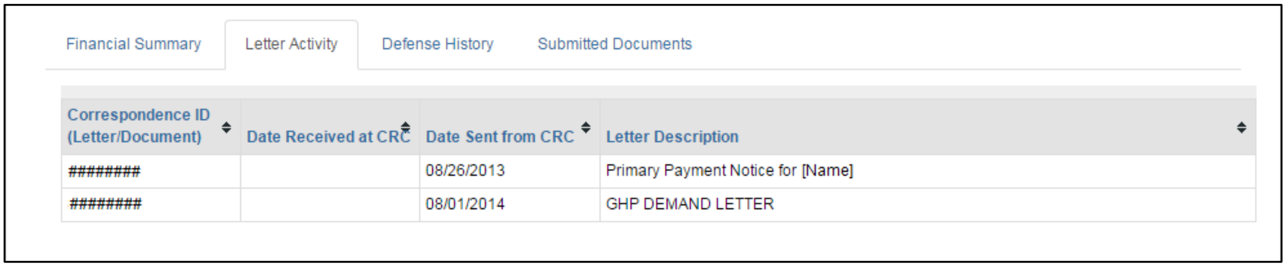


Table 9-13: Letter Activity Tab Fields

Field	Description
Correspondence ID (Letter/Document)	Displays the Correspondence ID for the selected Case ID. This is the letter ID for mail sent from the CRC, and the document ID for mail received by the CRC.
Date Received at CRC	Displays the date the CRC received the correspondence, if applicable.
Date Sent from CRC	Displays the date the CRC sent the correspondence, if applicable.
Letter Description	Displays the type of correspondence that was sent or received.

9.5.3 Defense History Tab

The *Defense History* tab lists defense documents (read only) submitted to the CRC through the portal or through the mail for the selected Case ID and includes defense decision correspondence sent from the CRC.

Figure 9-14: Defense History Tab

Defenses submitted to the CRC through the portal or through the mail for the selected Case ID are listed here.

Document ID (Incoming Defense)	Defense Number	Defense Received	Letter ID (Outgoing Response)	Decision	Decision Date	Viewed
86123654	21445587	01/02/2014	123654789	Partial	02/24/2014	No
86123444	21445583	01/03/2014	123654789	Invalid	02/22/2014	Yes
86123634	21445287	03/22/2014		Pending		

Table 9-14: Defense History Tab Fields

Field	Description
Document ID (Incoming Defense)	Displays the document ID of each submitted defense document for the selected Case ID.
Defense Number	Displays the defense number assigned by the Commercial Repayment Center (CRC) to the incoming defense letter for the selected Case ID.
Defense Received	Displays the date the CRC received and processed the incoming defensed letter for the selected Case ID.
Letter ID (Outgoing Response)	Displays the letter ID of an outgoing defense correspondence record for the selected Case ID
Decision	Displays the decision sent by the CRC on the outgoing defense letter for the selected Case ID. Possible defense decisions may include: Invalid, No Decision Necessary, Partial, and Valid. **Note:** The CRCP system will display a value of “Pending” in the *Decision* column with no Letter ID or Decision Date for any defense that does not have corresponding outgoing defense letter information on the CRCP.
Decision Date	Displays the decision date for the CRC defense decision letter for the selected Case ID.
Viewed	Identifies when new decisions have been added to the account. **Note**: When a new decision has been added, the Account Manager will be notified via email. The *Viewed* column initially displays **No** for new decisions that have been added to the account. **No** changes to **Yes** after the user exits the *Defense History* tab. A blank in this column identifies defenses that were added to the account prior to this functionality being added to the CRCP.

9.5.4 Submitted Documents Tab

The *Submitted Documents* tab displays (read only) all defenses that have been submitted via the portal for the selected Case ID.

Figure 9-15: Submitted Documents Tab

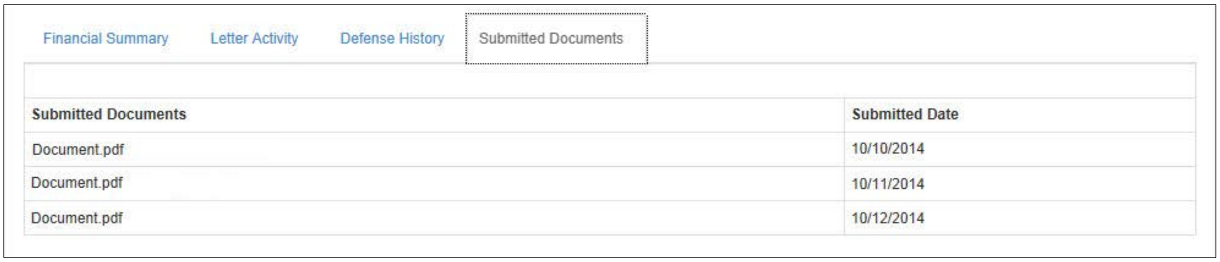


Table 9-15: Submitted Documents Tab Fields

Field	Description
Submitted Documents	Displays the filename, with extension, of each document that was submitted for the selected Case ID.
Submitted Date	Displays the date the document was submitted by the CRCP.

Chapter 10: Managing Primary Payment Notices for an Account ID

10.1 Introduction

The CRCP lists PPN letter IDs associated to a specific Account ID. The list of PPNs is displayed in on the lower part of the *PPN Listing* page. From this page, you can submit coverage updates for a PPN worksheet using the file upload or data entry process.

Notes:

Once you have submitted a response to a PPN Letter ID, you will not be able to make any further updates to coverage information.

If you decide to mail your PPN response to the CRC instead of using the CRCP, the response updates and status will not be displayed automatically on the portal for that PPN Letter ID. To get more information about the status, you will have to contact the CRC directly at 1-855-798-2627 (TTY/TDD: 1-855-797-2627 for the hearing and speech impaired).

10.2 The PPN Listing Page

The *PPN Listing* page (Figure 10-1) displays a list of currently open PPN letter IDs issued to companies associated with the current Account ID. Open PPNs include all PPNs in Open, Work- In-Progress, and File Pending Submission status. If there are over 100 open PPN letter ID's associated to the account, only the first 100 will be shown and you will receive a warning message.

The top section of the page allows you to search for a specific PPN letter ID. You can search by the Letter ID, status, or the PPN response due date (or due date range) of a PPN letter. To reduce the number of records displayed, you may enter as much known criteria as possible before performing a search.

The lower section of the page lists all PPNs associated to the current Account ID, and displays information about each. If you search for specific PPN letter IDs, the results display in this section as well. Depending on the status of the PPN, you can upload a PPN response file, access a PPN Data Entry Response worksheet, or view previously submitted Data Entry Responses.

This section of the page also helps you identify when new PPN letters have been added to the account via the *Viewed* column. **Note**: When a new PPN letter has been added, the Account Manager will be notified by email.

The *Viewed* column initially displays **No** for new PPN Letter IDs that have been added to the account. **No** changes to **Yes** when the *File Upload* or *Data Entry* hyperlink is clicked. A blank in this column identifies PPNs that were added to the account prior to this functionality being added to the CRCP.

PPN Letter IDs are displayed in ascending order based on the *PPN Response Due Date* column when the *PPN Listing* page first displays. You can change the sort order of most columns by clicking the column header text.

To return to the *Account Detail* page, click **Previous**. Click **Demand Listing** to transfer to the *Demand Listing* page.

Figure 10-1: PPN Listing Page

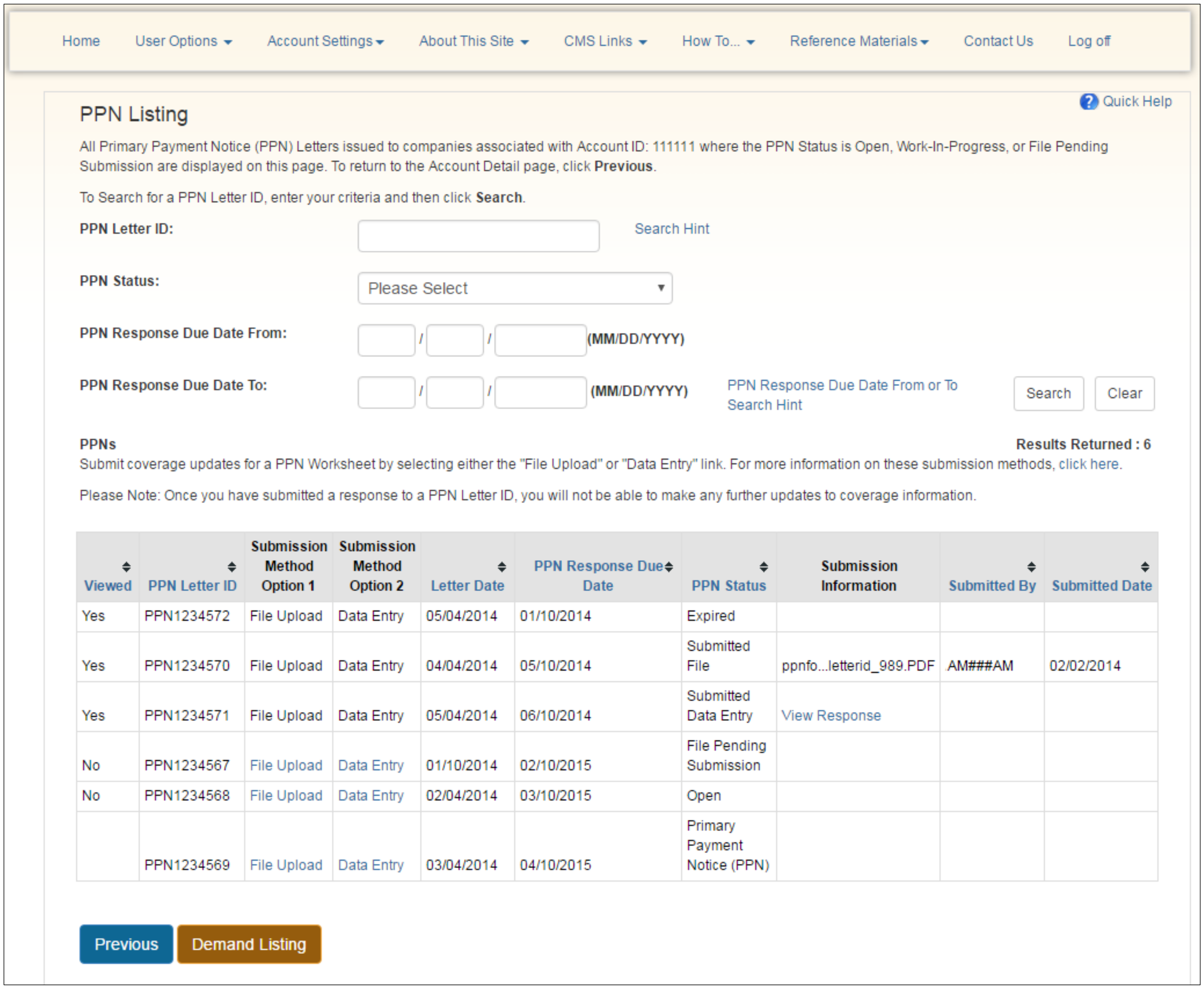


Table 10-1: PPN Listing Page Fields

Field	Description
Viewed	Identifies if the letter has been reviewed by a user. Values include: Yes – letter has been reviewed. No – letter has not been reviewed. Blank - letter was added to the account prior to this functionality being implemented.
PPN Letter ID	Enter the PPN Letter ID of the letter you wish to locate. You may also search using a percent sign (%) as a wildcard after entering the first four characters of the PPN Letter ID. Click the **Search Hint** hyperlink for details regarding search criteria.
PPN Status	Select the status of the PPN from the drop-down menu. Options for status include: • Closed • Expired • Open • File Pending Submission • Submitted Worksheet • Submitted Data Entry • Work-In-Progress By default, only open PPNs (Open, Work-In-Progress, and File Pending Submission statuses) display automatically when the *PPN Listing page* is accessed.
PPN Response Due Date (From)	Enter a valid date that is less than or equal to the date entered in the *PPN Response Due Date (To)* field. The date you enter must be within 180 days of the current date.
PPN Response Due Date (To)	Enter a valid date that is greater than or equal to the date entered in the *PPN Response Due Date (From)* field. To search for all letters sent on one specific date, enter the same date in both the *PPN Response Due Date (From)* field and the *PPN Response Due Date (To)* field. If no value is entered in this field, then the system will set the value equal to the current date. Click the **From and To Search Hint** hyperlink for details regarding search criteria.
Search	Click this button to search for PPNs that meet the criteria you entered in the fields above. PPNs that matching your search criteria are displayed in the *PPNs* section. PPNs display only if the PPN Response Due Date is within the range of 180 calendar days before the current date and 46 calendar days after the current date. Searching allows you to view open and closed PPNs that meet the criteria.
Clear	Click this button to clear the data from the search fields and re-display the default PPN listing (i.e., all open PPNs).
PPNs	-

Field	Description
PPN Letter ID	Displays the Letter ID of the PPN letter.
Submission Method 1	Displays the **File Upload** hyperlink for uploading a completed PPN Worksheet file. The hyperlink is active only when the PPN is in “Open,” “File Pending Submission,” or “Work-In-Progress” status. When clicked, it displays the *Upload PPN Worksheet* page.
Submission Method 2	Displays the **Data Entry** hyperlink for completing an online version of the PPN Worksheet. The hyperlink is active only when the PPN is in “Open,” “File Pending Submission,” or “Work-In-Progress” status. When clicked, it displays the *PPN Data Entry Response* page. **Note:** You can continue to make updates to the Worksheet until the status of the PPN is set to “Expired” or “Submitted.”
Letter Date	Displays the date printed at the top of the PPN letter.
PPN Response Due Date	Displays the date the PPN response is due to the CRC. **Note:** Once a response is submitted, you can no longer make any further updates to the coverage information.
PPN Status	Displays the status of the PPN. Options for status include: • Closed • Expired • Open • File Pending Submission • Submitted Worksheet • Submitted Data Entry • Work-In-Progress
Submission Information	Displays additional information about the PPN submission depending on the submission method used. This information includes: • Data Entry: A **View Response** hyperlink when the status of the PPN Letter ID is “Submitted Data Entry.” Clicking this hyperlink displays the *PPN Data Entry Response* page in read-only format. • File Upload: The file name of the PPN response file when the status of the PPN Letter ID is “Submitted File.” The CRCP will display a shortened version of filenames longer than 20 characters.
Submitted By	Displays the Login ID of the user who submitted the PPN response using either the Data Entry or File Upload methods.
Submitted Date	Displays the date the PPN response was submitted.
Previous	This button takes you to the *Account Detail* page.
Demand Listing	This button transfers you to the *Demand Listing* page.

10.3 PPN Search

You can search for a specific PPN letter ID using the search fields at the top of the page. You can search by using the following fields:

- PPN Letter ID
- PPN Status
- PPN Response Due Date From
- PPN Response Due Date To

To search for a PPN letter by Letter ID:

1. Enter the Letter ID of the PPN in the *Letter ID* field.

   For the PPN Letter ID, you can also perform searches substituting a percent (%) as a wildcard at the end of the search term. Enter at least four characters when using the wildcard (i.e., 8601%). Click the **Search Hint** hyperlink for details regarding search criteria.

2. Click **Search**.

To search for a PPN letter by the status of the PPN:

1. Select the status of the PPN from the *Status* drop-down menu.
2. Click **Search**.

To search for a PPN letter by PPN response due date(s):

1. Enter the range of dates in the *PPN Response Due Date (From)* and *PPN Response Due Date (To)* fields.

   Make sure the dates are valid and are less than or equal to the current date. Click the **From and To Search Hint** hyperlink for details regarding search criteria.

   - If the *From* date field is populated and the *To* date field is empty, the CRCP will retrieve all letters where the PPN Response Due Date is on or between the *From* date and the current date.
   - If the *From* and *To* date fields have the same value, the CRCP will retrieve all letters where the PPN Response Due Date is equal to the exact date entered.
   - Please note that the CRCP will only retrieve letters with PPN Response Due Dates that fall between 180 calendar days prior to the current date and 46 calendar days after the current date.

2. Click **Search**.

   PPN Letter IDs that have a *PPN Response Due Date* that match the search criteria are displayed.

For all searches, the search results will appear in the *PPNs* section at the bottom of the *PPN Listing* page. By default, results are displayed in ascending order based on the *PPN Response Due Date* column.

Click the **Clear** button at any time to delete the entered search information and re-display all PPNs in Open, Work-In-Progress, or File Pending Submission status.

Table 10-1 describes the search fields on the *PPN Listing* page, including field restrictions and use of wildcards.

10.4 PPN Response Submission

You can submit a PPN response either by manually entering the data on the *PPN Data Entry Response* page, or by uploading a completed PPN worksheet file. On the *PPN Listing* page, you can click either **File Upload** (*Submission Option 1* column) or **Data Entry** (*Submission Option 2* column) to access the different methods of submitting a PPN Response. Only PPNs in Open, File Pending Submission, and Work-In-Progress status display hyperlinks in these columns.

If a PPN response has already been saved using an alternate submission method, you will be prompted with a confirmation page asking if you want to continue with the chosen submission method. When you receive this message, click **Cancel** to return to the *PPN Listing* page or click **Continue** to proceed to the alternate submission method.

10.4.1 PPN File Upload Submission

You can upload one PPN worksheet file with your coverage updates for the selected PPN Letter ID. Note that file uploads cannot be viewed once they have been uploaded to the CRCP.

The selected file must meet the following criteria:

- File is in .PDF or .TIF format.
- File is virus free.
- File size is less than or equal to 40 MB (megabytes) in size.
- File name only includes the following valid alphanumeric characters: any letter (A-Z, a-z), any number (0-9), and any of the following special characters: hyphen (-), period (.) and underscore (__).
- File name does not include spaces.
- File name is less than or equal to 80 characters.

To Upload a PPN worksheet file:

1. On the *PPN Listing* page, click **File Upload** next to the relevant PPN Letter ID.

   The *Upload PPN Worksheet* page (Figure 10-2) displays.

   Note: If the file is in Work-In-Progress status, meaning a PPN Data Entry response is in-process, a confirmation page will appear. From this confirmation page, click **Cancel** to return to the *PPN Listing* page, saving the Work-In-Progress, or click **Continue** to continue to the *Upload PPN Worksheet* page, which will delete the pending data entry response from the system, and change the status of the selected PPN letter to Open.

2. Click **Browse…**, and select a file stored on your computer for submission.

3. Click **Upload** to upload the file to the CRCP system. The filename and extension appear in the *PPN Worksheet Pending Submission* section of the *Upload PPN Worksheet* page.

   Note: File upload may take several minutes to complete.

4. Click **Continue** to review the file and details to be submitted, and advance to the *Review and Submit PPN Worksheet* page.

   Alternatively, you can click:

   a. **Previous** to return to the *PPN Listing* page. This retains the uploaded file.

   b. **Delete** to delete the uploaded file and re-display the *Upload PPN Worksheet* page with the file removed from the page.

   The *Review and Submit PPN Worksheet* page (Figure 10-3) displays.

5. On the *Review and Submit PPN Worksheet* page, select the radio buttons to answer the employer certification question and to select the appropriate changes attestation.

You must select both an answer to the employer certification question AND the appropriate changes attestation.

6. Click **Continue** to display the *PPN Worksheet Submission Confirmation* page (Figure 10-4). Clicking **Continue** also submits the file for the selected PPN Letter ID.

   Alternatively, you can click **Previous** to return to the *Upload PPN Worksheet* page.

7. On the *PPN Worksheet Submission Confirmation* page (Figure 10-4), review the displayed information for your records. Click **OK** to return to the *PPN Listing* page.

Figure 10-2: Upload PPN Worksheet Page

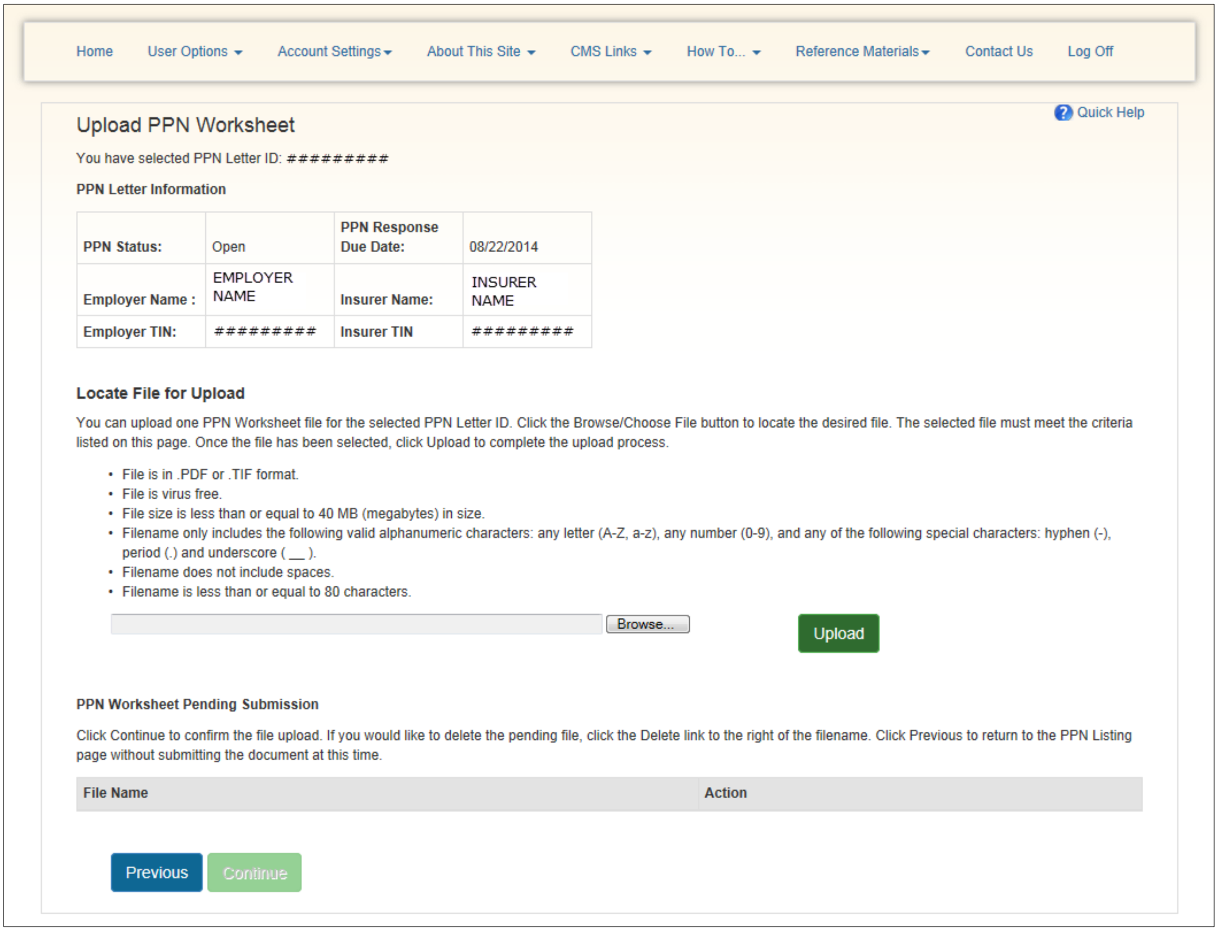


Table 10-2: Upload PPN Worksheet Page Fields

Field	Description
PPN Letter Information	-
PPN Status	Displays the status of the PPN. Options for status include: • Open • File Pending Submission • Work-In-Progress
PPN Response Due Date	Displays the date the PPN response is due to the CRC.

Field	Description
Employer Name	Displays the name of the employer for the selected PPN Letter ID.
Employer TIN	Displays the Tax Identification Number of the employer for the selected PPN Letter ID.
Insurer Name	Displays the name of the insurer for the selected PPN Letter ID.
Insurer TIN	Displays the Tax Identification Number of the insurer for the selected PPN Letter ID.
Browse…	This button allows files on your system to be selected for upload to the CRCP. This button is disabled if there is a file pending upload.
Upload	This button is enabled after you select a file using the **Browse/Choose File** link. Clicking this button uploads the selected file to the CRCP. This button does NOT submit the file, and cancelling after upload discards the upload.
Delete	Click to delete the uploaded file and re-display the *Upload PPN Worksheet* page with the uploaded file deleted. This hyperlink is only enabled after a file has been uploaded, and is disabled if a file has not yet been selected.
Previous	This button discards the file and returns you to the *PPN Listing* page.
Continue	This button saves your changes and takes you to the *Review and Submit PPN Worksheet* page. This button is disabled if no file has been selected for upload.

Figure 10-3: Review and Submit PPN Worksheet Page

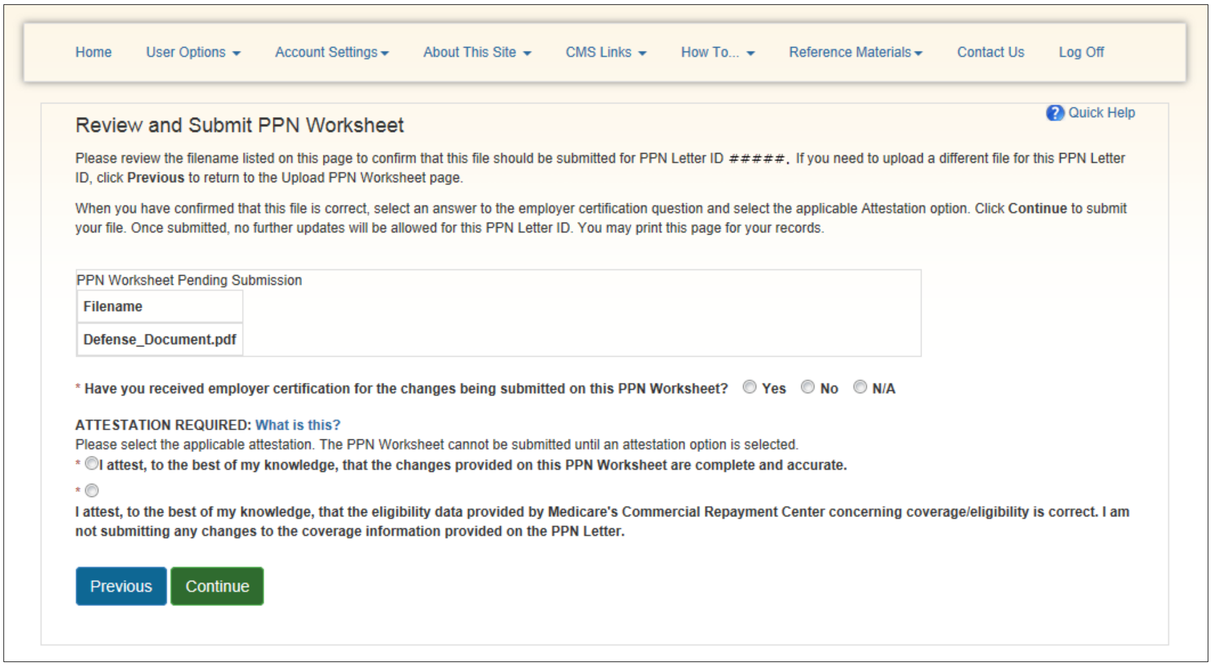


Table 10-3: Review and Submit PPN Worksheet Page Fields

Field	Description
PPN Worksheet Pending Submission	-
File Name	Displays the name and extension of the file you are uploading. Users may neither see the contents of nor download any uploaded file on the CRCP.
Employer certification question	Select the appropriate radio button that answers the question as it appears. Options are: • Yes • No • N/A
Attestation Required	CMS requires you to confirm the accuracy and completeness of any updates you submit, or to confirm that you are not submitting any changes. Select the radio button that is correct from these options: • I attest, to the best of my knowledge, that the changes provided on this PPN Worksheet are complete and accurate. • I attest, to the best of my knowledge, that the eligibility data provided by Medicare's Commercial Repayment Center concerning coverage/eligibility is correct. I am not submitting any changes to the coverage information provided on the PPN Letter.
Previous	This button takes you to the *Upload PPN Worksheet* page, with your uploaded file pending submission.
Continue	This button saves your selections and takes you to the *PPN Worksheet Submission Confirmation* page.

Figure 10-4: PPN Worksheet Submission Confirmation Page

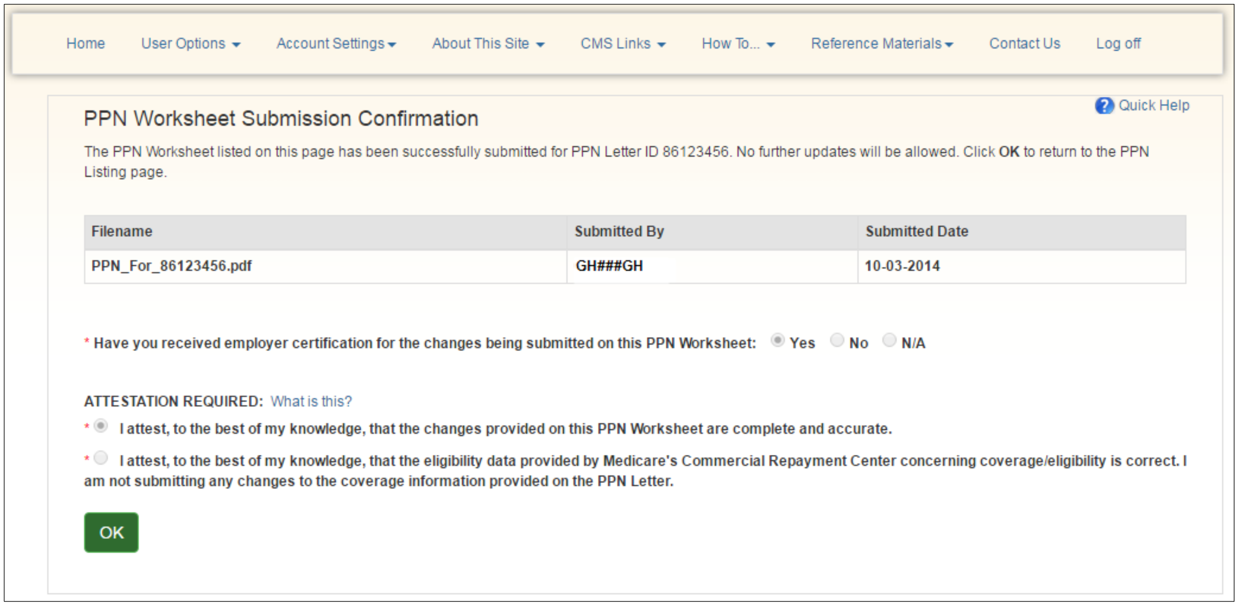


Table 10-4: PPN Worksheet Submission Confirmation Page Fields

Field	Description
File Name	Displays the name and extension of the file you submitted.
Submitted By	Displays the Login ID of the individual who submitted the file.
Submitted Date	Displays the date the file was submitted.
Employer certification question	Displays the text and selection in read-only format of the attestation you selected on the *Review and Submit PPN Worksheet* page.
Attestation Required	Displays the text and selection in read-only format of the attestation you selected on the *Review and Submit PPN Worksheet* page.
OK	This button takes you to the *PPN Listing* page.

10.4.2 PPN Data Entry Submission

You can also submit a PPN response using the online data entry version of the PPN worksheet instead of uploading a response file.

To submit a PPN Data Entry Response:

1. From the *PPN Listing* page, click **Data Entry** for a PPN Letter ID.

   The *PPN Data Entry Response* page (Figure 10-5) displays, listing all beneficiary information associated to the current PPN.

   Note: A warning page appears if there is a file pending submission for the PPN Letter ID.

2. In the *PPN Beneficiaries and Related Coverage Information* section, enter updates to coverage information for all applicable beneficiaries. Updates can be made in the following fields:

- *Updates to Coverage Start Date*
- *Updates to Coverage End Date*
- *Updates to Retirement Date*
- *No Coverage End Date* (checkbox) (indicates that the coverage end date should be changed to be open-ended)
- *No Record* (checkbox) (indicates whether or not you have a record of the beneficiary)

Table 10-5 describes the fields on the *PPN Data Entry Response* page.

3. (Optional) To search for a specific beneficiary by HICN or by the beneficiary's last name:

   a. Enter the HICN in the *HICN* field, or enter the beneficiary's last name in the *Beneficiary Last Name* field.

   b. Click **Search**.

   For all searches, the search results will appear in the *PPN Beneficiaries and Related Coverage Information* section at the bottom of the *PPN Data Entry Response* page.

   Table 10-5 describes the fields on the *PPN Data Entry Response* page, including field restrictions and use of wildcards.

4. After you have updated the coverage information for all applicable beneficiaries, perform any of the following actions:

   a. Click **Save** to save you current updates as a Work-In-Progress and remain on the *PPN Data Entry Response* page. Saving allows you to provide partial information and save updates as a Work-In-Progress multiple times while continue to provide updates. The status of the PPN changes to "Work-In-Progress" when you save your updates.

      - Click **Delete** to delete the Work-In-Progress and return to the *PPN Listing* page. When **Delete** is clicked, you receive a message to confirm the deletion.
      - If you continue with the delete request, the record is deleted, and the *PPN Listing* page displays. The status of the PPN is changed to open.
      - If you change your mind about the delete request, you return to the *PPN Data Entry Response* page with all previously saved work intact.

   b. Click **Previous** to return to the *PPN Listing* page. A warning message displays if changes have not yet been saved.

   If you have not saved you work when you click **Previous**, changes are discarded, the record is reverted to the previously saved version, and the *PPN Listing* page displays.

   c. Click **Cancel** to discard your changes, return the record to the previously saved version, and to remain on the *PPN Data Entry Response* page. A warning message displays to confirm the cancellation.

   d. Click **Continue** to display the *Review and Submit PPN Data Entry Response* page.

5. After clicking **Continue**, the *Review and Submit PPN Data Entry Response* page displays (Figure 10-6). Select the radio buttons to answer the employer attestation question and to select the appropriate changes attestation.

   You must select both an answer to the employer attestation question AND the appropriate changes attestation.

6. Click **Continue** to submit the data entry response for the selected PPN Letter ID, and display the *PPN Data Entry Response Submission Confirmation* page (Figure 10-7). The status of the

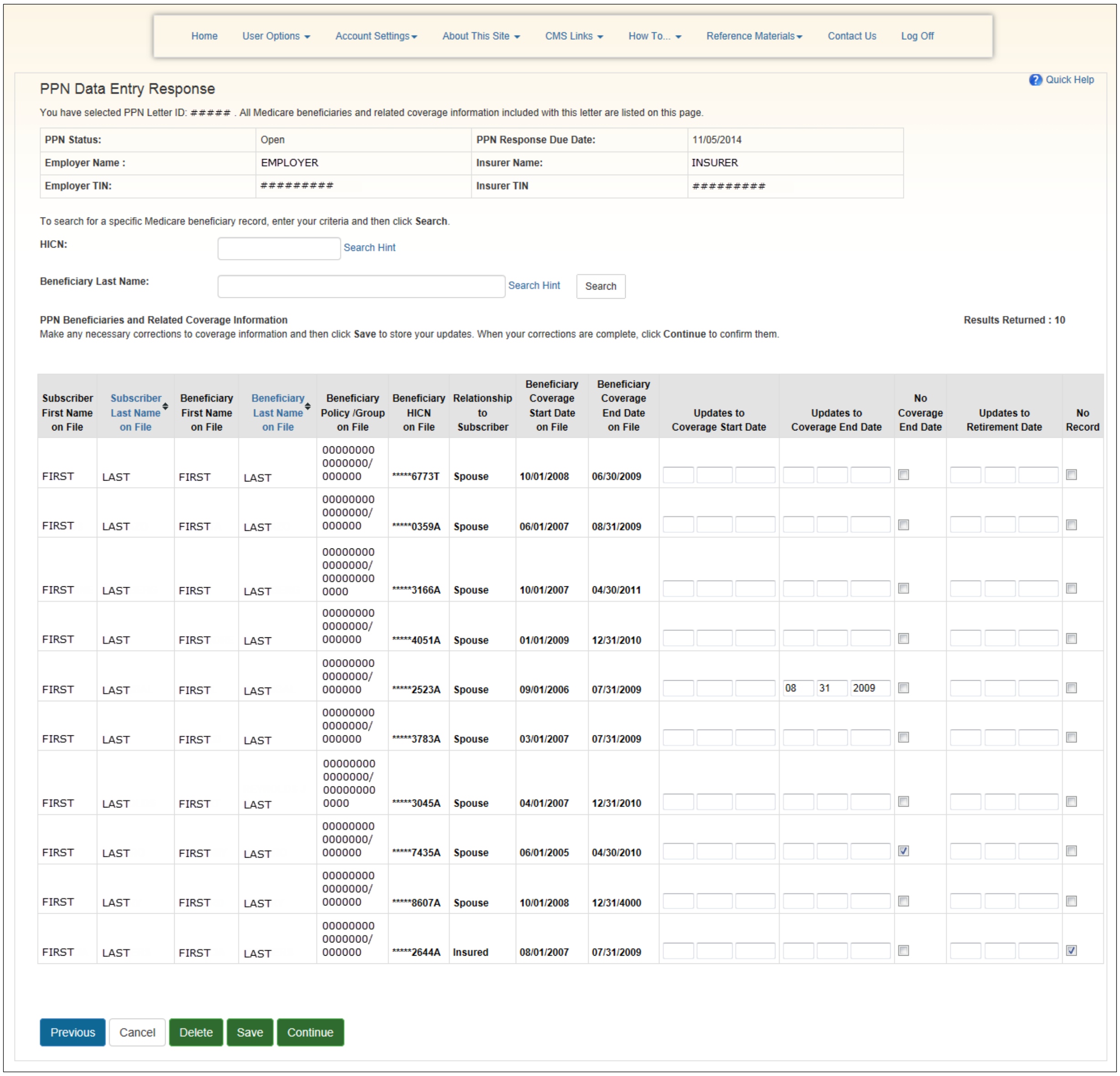
PPN changes to “Submitted Data Entry” and no further updates are allowed when you submit the data entry response.

You can also click **Cancel** to return to the *PPN Data Entry Response* page with all entered data displayed.

7. On the *PPN Data Entry Response Submission Confirmation* page, click **OK** to return to the *PPN Listing* page.

   Note: After submitting a PPN data entry response, changes are retained on the CRCP for 6 months before they are no longer visible. You can view the data entry response at any time within this time period.

Figure 10-5: PPN Data Entry Response Page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Quick Help

PPN Data Entry Response

You have selected PPN Letter ID: ##### . All Medicare beneficiaries and related coverage information included with this letter are listed on this page.

PPN Status:	Open	PPN Response Due Date:	11/05/2014
Employer Name :	EMPLOYER	Insurer Name:	INSURER
Employer TIN:	#########	Insurer TIN	#########

To search for a specific Medicare beneficiary record, enter your criteria and then click **Search**.

HICN: Search Hint

Beneficiary Last Name: Search Hint Search

PPN Beneficiaries and Related Coverage Information

Make any necessary corrections to coverage information and then click **Save** to store your updates. When your corrections are complete, click **Continue** to confirm them.

Results Returned : 10

Subscriber First Name on File	Subscriber Last Name on File	Beneficiary First Name on File	Beneficiary Last Name on File	Beneficiary Policy /Group on File	Beneficiary HICN on File	Relationship to Subscriber	Beneficiary Coverage Start Date on File	Beneficiary Coverage End Date on File	Updates to Coverage Start Date	Updates to Coverage End Date	No Coverage End Date	Updates to Retirement Date	No Record
FIRST	LAST	FIRST	LAST	000000000000000/000000	*****6773T	Spouse	10/01/2008	06/30/2009					
FIRST	LAST	FIRST	LAST	000000000000000/000000	*****0359A	Spouse	06/01/2007	08/31/2009					
FIRST	LAST	FIRST	LAST	000000000000000/000000000000	*****3166A	Spouse	10/01/2007	04/30/2011					
FIRST	LAST	FIRST	LAST	000000000000000/000000	*****4051A	Spouse	01/01/2009	12/31/2010					
FIRST	LAST	FIRST	LAST	000000000000000/000000	*****2523A	Spouse	09/01/2006	07/31/2009		08 31 2009			
FIRST	LAST	FIRST	LAST	000000000000000/000000	*****3783A	Spouse	03/01/2007	07/31/2009					
FIRST	LAST	FIRST	LAST	000000000000000/000000000000	*****3045A	Spouse	04/01/2007	12/31/2010					
FIRST	LAST	FIRST	LAST	000000000000000/000000	*****7435A	Spouse	06/01/2005	04/30/2010			☑		
FIRST	LAST	FIRST	LAST	000000000000000/000000	*****8607A	Spouse	10/01/2008	12/31/4000					
FIRST	LAST	FIRST	LAST	000000000000000/000000	*****2644A	Insured	08/01/2007	07/31/2009					☑

Previous | Cancel | Delete | Save | Continue

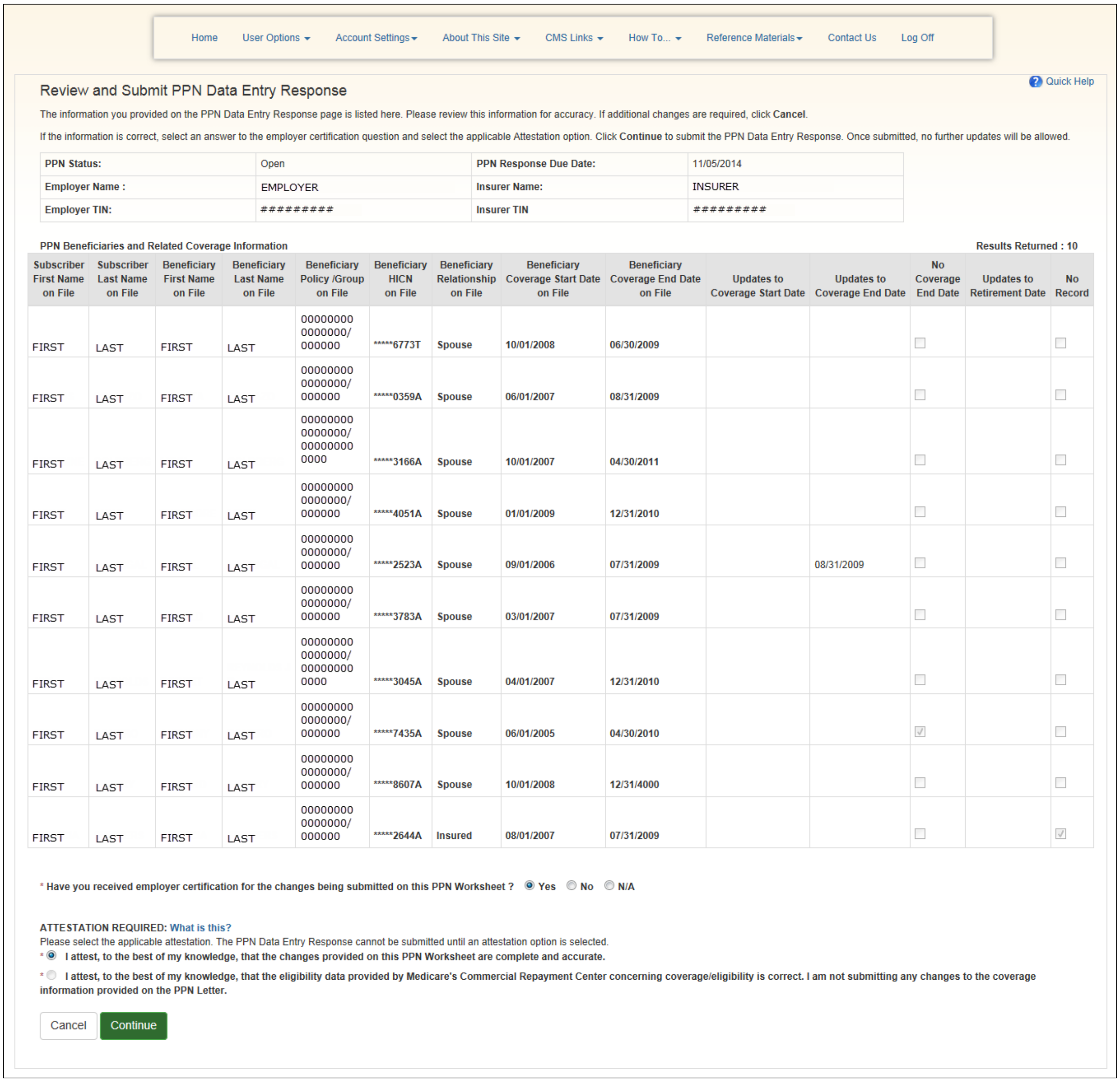
Table 10-5: PPN Data Entry Response Page Fields

Field	Description
PPN Letter Information	-
PPN Status	Displays the status of the PPN. Options for status include: • Open • File Pending Submission • Work-In-Progress This field is displayed in read-only format.
PPN Response Due Date	Displays the date the PPN response is due to the CRC. This field is displayed in read-only format.

Field	Description
Employer Name	Displays the name of the employer for the selected PPN Letter ID. This field is displayed in read-only format.
Employer TIN	Displays the Tax Identification Number of the employer for the selected PPN Letter ID. This field is displayed in read-only format.
Insurer Name	Displays the name of the insurer for the selected PPN Letter ID. This field is displayed in read-only format.
Insurer TIN	Displays the Tax Identification Number of the insurer for the selected PPN Letter ID. This field is displayed in read-only format.
Search Fields	-
HICN	Enter the Health Insurance Claim Number associated to the beneficiary that you are searching for. You may also search using a percent sign (%) as a wildcard after entering the first four characters of the HICN. The HICN must be alphanumeric, and cannot contain any spaces or special characters other than an optional wildcard symbol (%).If a wildcard is used, it must be at the end of the search term. Click the **Search Hint** hyperlink for details regarding search criteria.
Beneficiary Last Name	Enter the last name of the beneficiary you are searching for. You may also search using a percent sign (%) as a wildcard after entering the first character of the beneficiary’s last name. The beneficiary's last name must start with a letter and may only contain letters, an apostrophe (’), a hyphen (-), a space, or a wildcard (%). If a wildcard is used, it must be at the end of the search term. Click the **Search Hint** hyperlink for details regarding search criteria.
Search	Click this button to search for beneficiaries that meet the criteria you entered in the fields above. Matching beneficiaries are displayed in the *PPN Beneficiaries and Related Coverage Information* section.
PPN Beneficiaries and Related Coverage Information	-
Subscriber First Name on File	Displays the first name of the subscriber on the policy. This field is displayed in read-only format.
Subscriber Last Name on File	Displays the last name of the subscriber on the policy. This field is displayed in read-only format.
Beneficiary First Name on File	Displays the first name of the beneficiary for the case. This field is displayed in read-only format.
Beneficiary Last Name on File	Displays the last name of the beneficiary for the case. This field is displayed in read-only format.

Field	Description
Beneficiary Policy/ Group on File	Displays the policy number and group number of the policy for the case. This field is displayed in read-only format.
Beneficiary HICN on File	Displays the HICN for the beneficiary for the case. The first five characters of the HICN are masked, and show as asterisks (*). This field is displayed in read-only format.
Beneficiary Relationship on File	Displays the relationship of the beneficiary to the subscriber, listed as a text description in read-only format.
Coverage Start Date on File	Displays the start date of coverage for the policy. This field is displayed in read-only format.
Coverage End Date on File	Displays the end date of coverage for the policy. This field is displayed in read-only format.
Updates to Coverage Start Date	Enter a valid date that is less than or equal to the date entered in the *Updates to Coverage End Date* field, and also less than or equal to the current date (as applicable).
Updates to Coverage End Date	Enter a valid date that is greater than or equal to the date entered in the *Updates to Coverage Start Date* field, and also less than or equal to the current date (as applicable).
No Coverage End Date	Check this box to indicate open-ended coverage (as applicable). **Note:** When this box is checked, the *Updates to the Coverage End Date* field will display as blank.
Updates to Retirement Date	Enter a valid date for the date of retirement (as applicable).
No Record	Check this box to indicate you do not have a record for the beneficiary (as applicable).
Previous	This button discards any unsaved changes and returns you to the *PPN Listing* page.
Cancel	This button discards your changes and leaves you on the *PPN Data Entry Response* page; the record reverts to the previously saved version.
Delete	Click this button to delete the selected record. A confirmation page will ask you if you want to: • Continue with the delete request. This will take you to the *PPN Listing* page, where the status of the PPN is listed as open. • Cancel the delete request. This will return you to the *PPN Data Entry Response* page with all previously saved work intact.
Save	This button allows you to provide partial information and save updates as a Work-In-Progress multiple times while completing the data entry response.
Continue	This button saves your changes and takes you to the *Review and Submit PPN Data Entry Response* page.

Figure 10-6: Review and Submit PPN Data Entry Response Page



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Quick Help

Review and Submit PPN Data Entry Response

The information you provided on the PPN Data Entry Response page is listed here. Please review this information for accuracy. If additional changes are required, click **Cancel**.

If the information is correct, select an answer to the employer certification question and select the applicable Attestation option. Click **Continue** to submit the PPN Data Entry Response. Once submitted, no further updates will be allowed.

PPN Status:	Open	**PPN Response Due Date:**	11/05/2014
Employer Name :	EMPLOYER	**Insurer Name:**	INSURER
Employer TIN:	#########	**Insurer TIN**	#########

PPN Beneficiaries and Related Coverage Information — **Results Returned : 10**

Subscriber First Name on File	Subscriber Last Name on File	Beneficiary First Name on File	Beneficiary Last Name on File	Beneficiary Policy /Group on File	Beneficiary HICN on File	Beneficiary Relationship on File	Beneficiary Coverage Start Date on File	Beneficiary Coverage End Date on File	Updates to Coverage Start Date	Updates to Coverage End Date	No Coverage End Date	Updates to Retirement Date	No Record
FIRST	LAST	FIRST	LAST	00000000 0000000/ 000000	*****6773T	Spouse	10/01/2008	06/30/2009			☐		☐
FIRST	LAST	FIRST	LAST	00000000 0000000/ 000000	*****0359A	Spouse	06/01/2007	08/31/2009			☐		☐
FIRST	LAST	FIRST	LAST	00000000 0000000/ 00000000 0000	*****3166A	Spouse	10/01/2007	04/30/2011			☐		☐
FIRST	LAST	FIRST	LAST	00000000 0000000/ 000000	*****4051A	Spouse	01/01/2009	12/31/2010			☐		☐
FIRST	LAST	FIRST	LAST	00000000 0000000/ 000000	*****2523A	Spouse	09/01/2006	07/31/2009		08/31/2009	☐		☐
FIRST	LAST	FIRST	LAST	00000000 0000000/ 000000	*****3783A	Spouse	03/01/2007	07/31/2009			☐		☐
FIRST	LAST	FIRST	LAST	00000000 0000000/ 00000000 0000	*****3045A	Spouse	04/01/2007	12/31/2010			☐		☐
FIRST	LAST	FIRST	LAST	00000000 0000000/ 000000	*****7435A	Spouse	06/01/2005	04/30/2010			☑		☐
FIRST	LAST	FIRST	LAST	00000000 0000000/ 000000	*****8607A	Spouse	10/01/2008	12/31/4000			☐		☐
FIRST	LAST	FIRST	LAST	00000000 0000000/ 000000	*****2644A	Insured	08/01/2007	07/31/2009			☐		☑

* Have you received employer certification for the changes being submitted on this PPN Worksheet ? (•) Yes ( ) No ( ) N/A

ATTESTATION REQUIRED: What is this?

Please select the applicable attestation. The PPN Data Entry Response cannot be submitted until an attestation option is selected.

* (•) I attest, to the best of my knowledge, that the changes provided on this PPN Worksheet are complete and accurate.

* ( ) I attest, to the best of my knowledge, that the eligibility data provided by Medicare's Commercial Repayment Center concerning coverage/eligibility is correct. I am not submitting any changes to the coverage information provided on the PPN Letter.

Cancel | Continue

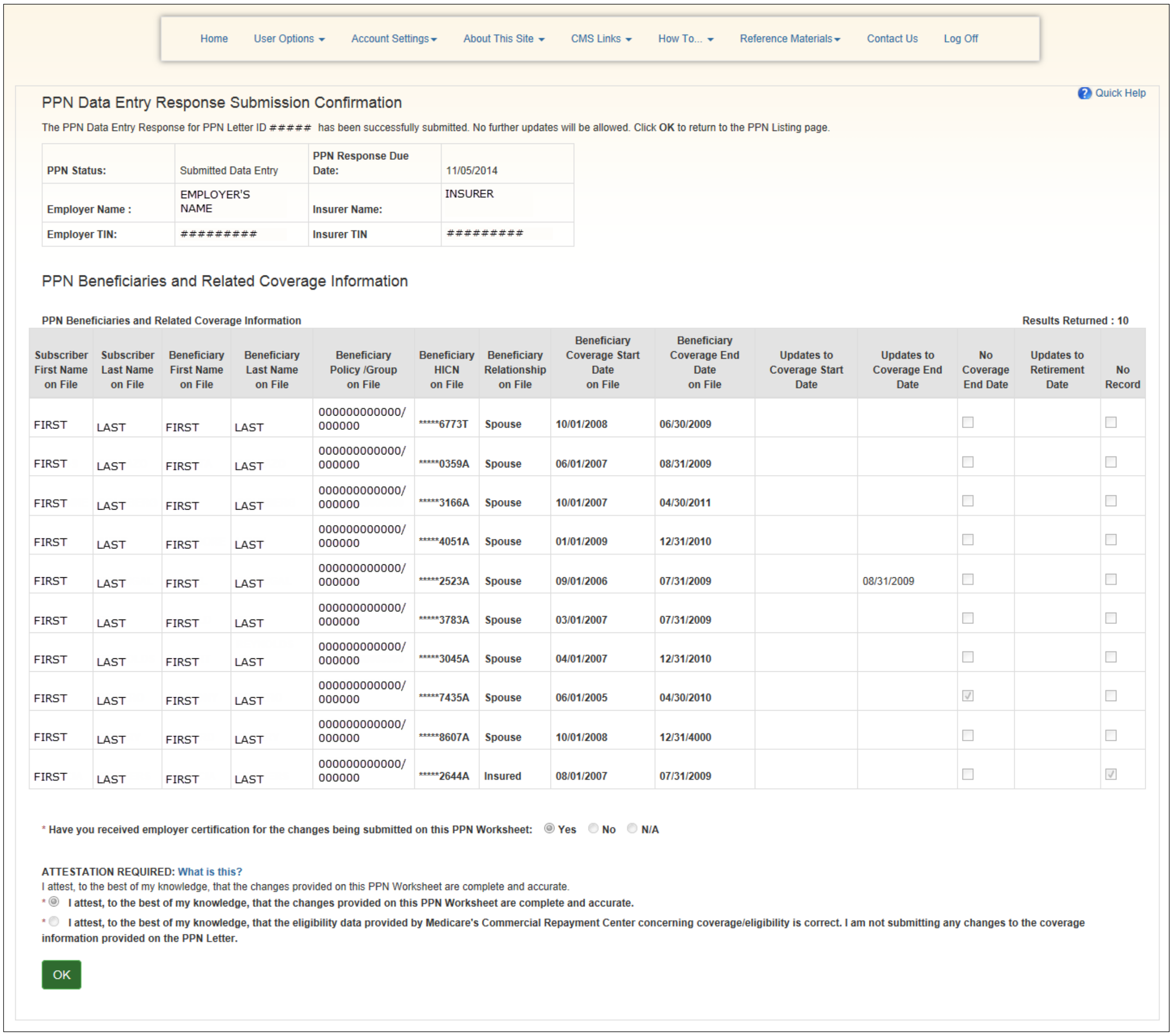
Table 10-6: Review and Submit PPN Data Entry Response Page Fields

Field	Description
PPN Beneficiaries and Related Coverage Information	-
Subscriber First Name on File	Displays the first name of the subscriber on the policy. This field is displayed in read-only format.
Subscriber Last Name on File	Displays the last name of the subscriber on the policy. This field is displayed in read-only format.
Beneficiary First Name on File	Displays the first name of the beneficiary for the case. This field is displayed in read-only format.
Beneficiary Last Name on File	Displays the last name of the beneficiary for the case. This field is displayed in read-only format.

Field	Description
Beneficiary Policy/ Group on File	Displays the policy number and group number of the policy for the case. This field is displayed in read-only format.
Beneficiary HICN on File	Displays the HICN for the beneficiary for the case. The first five characters of the HICN are masked, and show as asterisks (*). This field is displayed in read-only format.
Beneficiary Relationship on File	Displays the relationship of the beneficiary to the subscriber, listed as a text description in read-only format.
Coverage Start Date	Displays the start date of coverage for the policy. This field is displayed in read-only format.
Coverage End Date	Displays the end date of coverage for the policy. This field is displayed in read-only format.
Updates to Coverage Start Date	Displays the updated start date of coverage for the policy that was entered on the previous page (as applicable). This field is displayed in read-only format.
Updates to Coverage End Date	Displays the updated end date of coverage for the policy that was entered on the previous page (as applicable). This field is displayed in read-only format.
No Coverage End Date	Displays the checkbox indicating that coverage should be open-ended (as applicable). This field is displayed in read-only format. **Note:** When this box is checked, the *Updates to the Coverage End Date* field displays as blank.
Updates to Retirement Date	Displays the updated retirement date that was entered on the previous page (as applicable). This field is displayed in read-only format.
No Record	Displays the checkbox marking whether or not the record was found that was entered on the previous page (as applicable). This field is displayed in read-only format.
Employer certification question	Select the appropriate radio button that answers the question as it appears. Options are: • Yes • No • N/A
Attestation Required	CMS requires you to confirm the accuracy and completeness of any updates you submit, or to confirm that you are not submitting any changes. Select the radio button that is correct from these options: • I attest, to the best of my knowledge, that the changes provided on this PPN Worksheet are complete and accurate. • I attest, to the best of my knowledge, that the eligibility data provided by Medicare's Commercial Repayment Center concerning coverage/eligibility is correct. I am not submitting any changes to the coverage information provided on the PPN Letter.

Field	Description
Cancel	Click this button to discard your changes and remain on the *PPN Data Entry Response* page, with the record reverting to the previously saved version.
Continue	This button submits the PPN Data Entry Response to the CRCP and displays the *PPN Data Entry Response Submission Confirmation* page.

Figure 10-7: PPN Data Entry Response Submission Confirmation Page



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PPN Data Entry Response Submission Confirmation

The PPN Data Entry Response for PPN Letter ID ##### has been successfully submitted. No further updates will be allowed. Click **OK** to return to the PPN Listing page.

PPN Status:	Submitted Data Entry	**PPN Response Due Date:**	11/05/2014
Employer Name :	EMPLOYER'S NAME	**Insurer Name:**	INSURER
Employer TIN:	#########	**Insurer TIN**	#########

PPN Beneficiaries and Related Coverage Information

PPN Beneficiaries and Related Coverage Information **Results Returned : 10**

Subscriber First Name on File	Subscriber Last Name on File	Beneficiary First Name on File	Beneficiary Last Name on File	Beneficiary Policy /Group on File	Beneficiary HICN on File	Beneficiary Relationship on File	Beneficiary Coverage Start Date on File	Beneficiary Coverage End Date on File	Updates to Coverage Start Date	Updates to Coverage End Date	No Coverage End Date	Updates to Retirement Date	No Record
FIRST	LAST	FIRST	LAST	000000000000/ 000000	*****6773T	Spouse	10/01/2008	06/30/2009			☐		☐
FIRST	LAST	FIRST	LAST	000000000000/ 000000	*****0359A	Spouse	06/01/2007	08/31/2009			☐		☐
FIRST	LAST	FIRST	LAST	000000000000/ 000000	*****3166A	Spouse	10/01/2007	04/30/2011			☐		☐
FIRST	LAST	FIRST	LAST	000000000000/ 000000	*****4051A	Spouse	01/01/2009	12/31/2010			☐		☐
FIRST	LAST	FIRST	LAST	000000000000/ 000000	*****2523A	Spouse	09/01/2006	07/31/2009		08/31/2009	☐		☐
FIRST	LAST	FIRST	LAST	000000000000/ 000000	*****3783A	Spouse	03/01/2007	07/31/2009			☐		☐
FIRST	LAST	FIRST	LAST	000000000000/ 000000	*****3045A	Spouse	04/01/2007	12/31/2010			☐		☐
FIRST	LAST	FIRST	LAST	000000000000/ 000000	*****7435A	Spouse	06/01/2005	04/30/2010			☑		☐
FIRST	LAST	FIRST	LAST	000000000000/ 000000	*****8607A	Spouse	10/01/2008	12/31/4000			☐		☐
FIRST	LAST	FIRST	LAST	000000000000/ 000000	*****2644A	Insured	08/01/2007	07/31/2009			☐		☑

* **Have you received employer certification for the changes being submitted on this PPN Worksheet:** ◉ **Yes** ○ **No** ○ **N/A**

ATTESTATION REQUIRED: What is this?

I attest, to the best of my knowledge, that the changes provided on this PPN Worksheet are complete and accurate.

* ◉ **I attest, to the best of my knowledge, that the changes provided on this PPN Worksheet are complete and accurate.**

* ○ **I attest, to the best of my knowledge, that the eligibility data provided by Medicare's Commercial Repayment Center concerning coverage/eligibility is correct. I am not submitting any changes to the coverage information provided on the PPN Letter.**

OK

Table 10-7: PPN Data Entry Response Submission Confirmation Page Fields

Field	Description
PPN Letter Information	-
PPN Status	Displays the status of the PPN (Submitted Data Entry). This field is displayed in read-only format.
PPN Response Due Date	Displays the date the PPN response is due to the CRC. This field is displayed in read-only format.

Field	Description
Employer Name	Displays the name of the employer for the selected PPN Letter ID. This field is displayed in read-only format.
Employer TIN	Displays the Tax Identification Number of the employer for the selected PPN Letter ID. This field is displayed in read-only format.
Insurer Name	Displays the name of the insurer for the selected PPN Letter ID. This field is displayed in read-only format.
Insurer TIN	Displays the Tax Identification Number of the insurer for the selected PPN Letter ID. This field is displayed in read-only format.
PPN Beneficiaries and Related Coverage Information	-
Subscriber First Name on File	Displays the first name of the subscriber on the policy. This field is displayed in read-only format.
Subscriber Last Name on File	Displays the last name of the subscriber on the policy. This field is displayed in read-only format.
Beneficiary First Name on File	Displays the first name of the beneficiary for the case. This field is displayed in read-only format.
Beneficiary Last Name on File	Displays the last name of the beneficiary for the case. This field is displayed in read-only format.
Beneficiary Policy/ Group on File	Displays the policy number and group number of the policy for the case. This field is displayed in read-only format.
Beneficiary HICN on File	Displays the Health Insurance Claim Number of the case. The first five characters of the HICN are masked, and show as asterisks (*). This field is displayed in read-only format.
Beneficiary Relationship on File	Displays the relationship of the beneficiary to the subscriber, listed as a text description in read-only format.
Coverage Start Date on File	Displays the start date of coverage for the policy. This field is displayed in read-only format.
Coverage End Date on File	Displays the end date of coverage for the policy. This field is displayed in read-only format.
Updates to Coverage Start Date	Displays the updated start date of coverage for the policy that was entered on the previous page (as applicable). This field is displayed in read-only format.
Updates to Coverage End Date	Displays the updated end date of coverage for the policy that was entered on the previous page (as applicable). This field is displayed in read-only format.

Field	Description
No Coverage End Date	Displays a checkbox indicating that coverage should be open-ended (as applicable). This field is displayed in read-only format. **Note:** When this box is checked, the *Updates to the Coverage End Date* field will display as blank.
Updates to Retirement Date	Displays the updated retirement date that was entered on the previous page (as applicable). This field is displayed in read-only format.
No Record	Displays a checkbox if you indicated that you do not have a record for the beneficiary on the previous page. This field is displayed in read-only format.
Attestation Required	Displays the text and selection in read-only format of the attestation you selected on the *Review and Submit PPN Data Entry Response* page.
Changes attestation	Displays the text and selection in read-only format of the attestation you selected on the *Review and Submit PPN Data Entry Response* page.
OK	This button returns you to the *PPN Listing* page.

10.5 Submitted PPN Data Entry Response Information

After submitting a PPN Data Entry Response, you can view the completed data entry submission from the *PPN Listing* page for 6 months after the due date. PPNs that have manually completed worksheet associated with them contain a **View Response** hyperlink in the *Submission Information* column.

Click **View Response** to view the *Submitted PPN Data Entry Response Information* page (Figure 10-8) for that PPN Letter ID.

Figure 10-8: Submitted PPN Data Entry Response Information Page

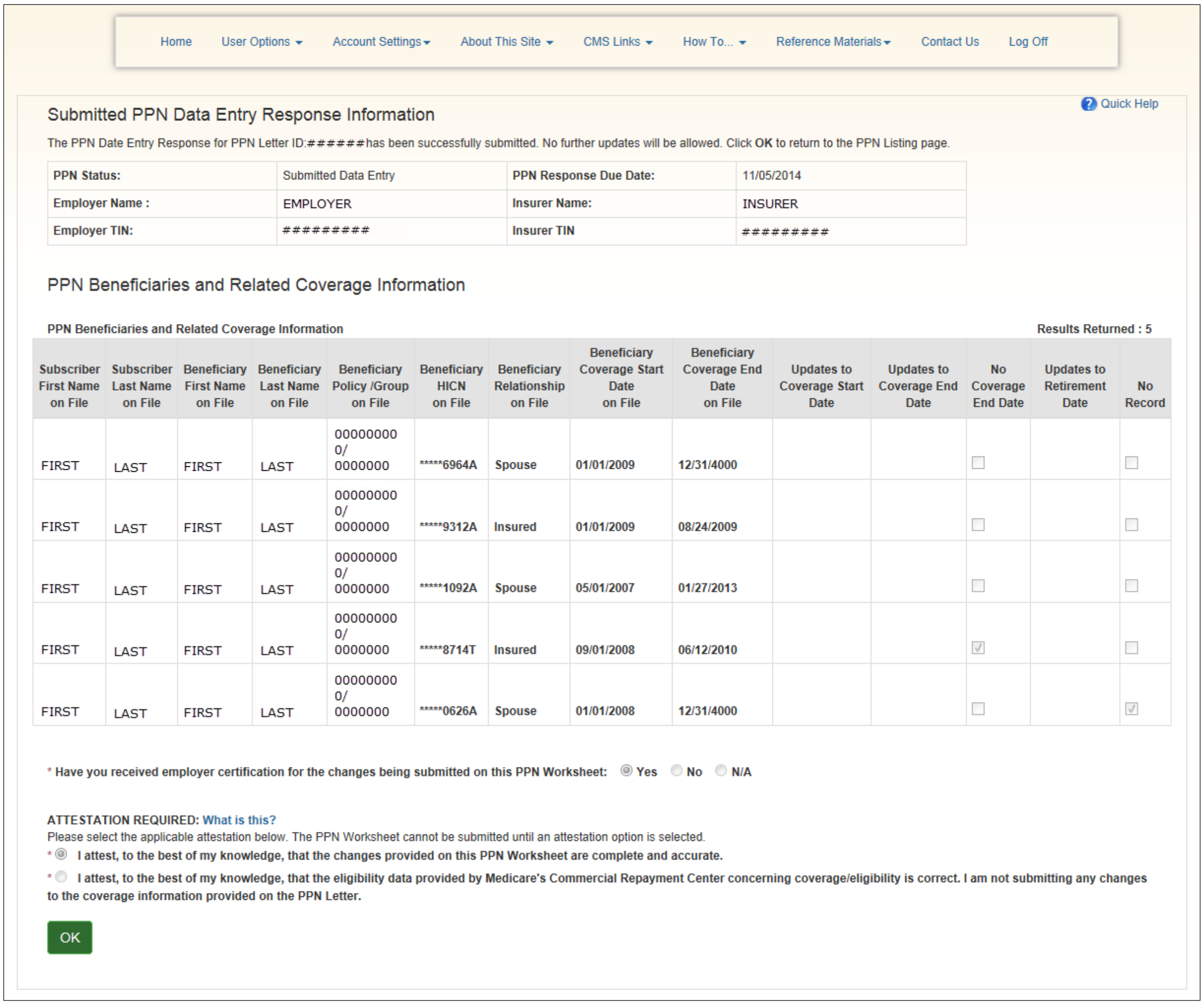


Table 10-8: Submitted PPN Data Entry Response Information Page Fields

Field	Description
PPN Letter Information	-
PPN Status	Displays the status of the PPN (Submitted Data Entry). This field is displayed in read-only format.
PPN Response Due Date	Displays the date a PPN response is due to the CRC. This field is displayed in read-only format.
Employer Name	Displays the name of the employer for the selected PPN Letter ID. This field is displayed in read-only format.
Employer TIN	Displays the TIN of the employer for the selected PPN Letter ID. This field is displayed in read-only format.
Insurer Name	Displays the name of the insurer for the selected PPN Letter ID. This field is displayed in read-only format.

Field	Description
Insurer TIN	Displays the TIN of the insurer for the selected PPN Letter ID. This field is displayed in read-only format.
PPN Beneficiaries and Related Coverage Information	-
Subscriber First Name on File	Displays the first name of the subscriber on the policy. This field is displayed in read-only format.
Subscriber Last Name on File	Displays the last name of the subscriber on the policy. This field is displayed in read-only format.
Beneficiary First Name on File	Displays the first name of the beneficiary on the case. This field is displayed in read-only format.
Beneficiary Last Name on File	Displays the last name of the beneficiary on the case. This field is displayed in read-only format.
Beneficiary Policy/ Group on File	Displays the policy number and group number of the policy on the case. This field is displayed in read-only format.
Beneficiary HICN on File	Displays the Health Insurance Claim Number of the case. The first five characters of the HICN are masked, and show as asterisks (*). This field is displayed in read-only format.
Beneficiary Relationship on File	Displays the relationship of the beneficiary to the subscriber, listed as a text description in read-only format.
Coverage Start Date	Displays the start date of coverage of the policy. This field is displayed in read-only format.
Coverage End Date	Displays the end date of coverage of the policy. This field is displayed in read-only format.
Updates to Coverage Start Date	Displays the updated start date of coverage of the policy that was entered on the previous page (as applicable). This field is displayed in read-only format.
Updates to Coverage End Date	Displays the updated end date of coverage of the policy that was entered on the previous page (as applicable). This field is displayed in read-only format.
No Coverage End Date	Displays a checkbox indicating that coverage should be open-ended (as applicable). This field is displayed in read-only format. **Note:** When this box is checked, the *Updates to the Coverage End Date* field will display as blank.
Updates to Retirement Date	Displays the updated retirement date that was entered on the previous page (as applicable). This field is displayed in read-only format.
No Record	Displays a checkbox if you indicated that you do not have a record for the beneficiary on the previous page. This field is displayed in read-only format.

Field	Description
Employer certification question	Displays the text and selection in read-only format of the attestation you selected on the *Review and Submit PPN Data Entry Response* page.
Changes attestation	Displays the text and selection in read-only format of the attestation you selected on the *Review and Submit PPN Data Entry Response* page.
OK	This button returns you to the *PPN Listing* page.

Chapter 11: Updating Contact Information

The CRCP allows AMs and ADs to change their personal information. AMs can also change the Authorized Representative for the account.

11.1 Personal Information

All ADs and AMs can change their personal information associated with their login ID, such as name, e-mail address, password, and other similar information.

11.1.1 Personal Information Update

To update your personal information:

1. After logging in to the CRCP, select the **Update Personal Information** link from the *User Options* drop-down menu on the navigation bar.

   The *Update Personal Information* page displays (Figure 11-2).

2. Make changes to any of the fields on this page. All fields denoted with an asterisk are required.

   Click **Continue** to save your changes and display the *Personal Information Update Confirmation* page (Figure 11-3).
   You can also click **Cancel** to return to the *Account Listing* page without saving changes.

3. Click **OK** on the *Personal Information Update Confirmation* page to return to the *Account Listing* page.

Figure 11-1: Update Personal Information Link

Figure 11-2: Update Personal Information Page

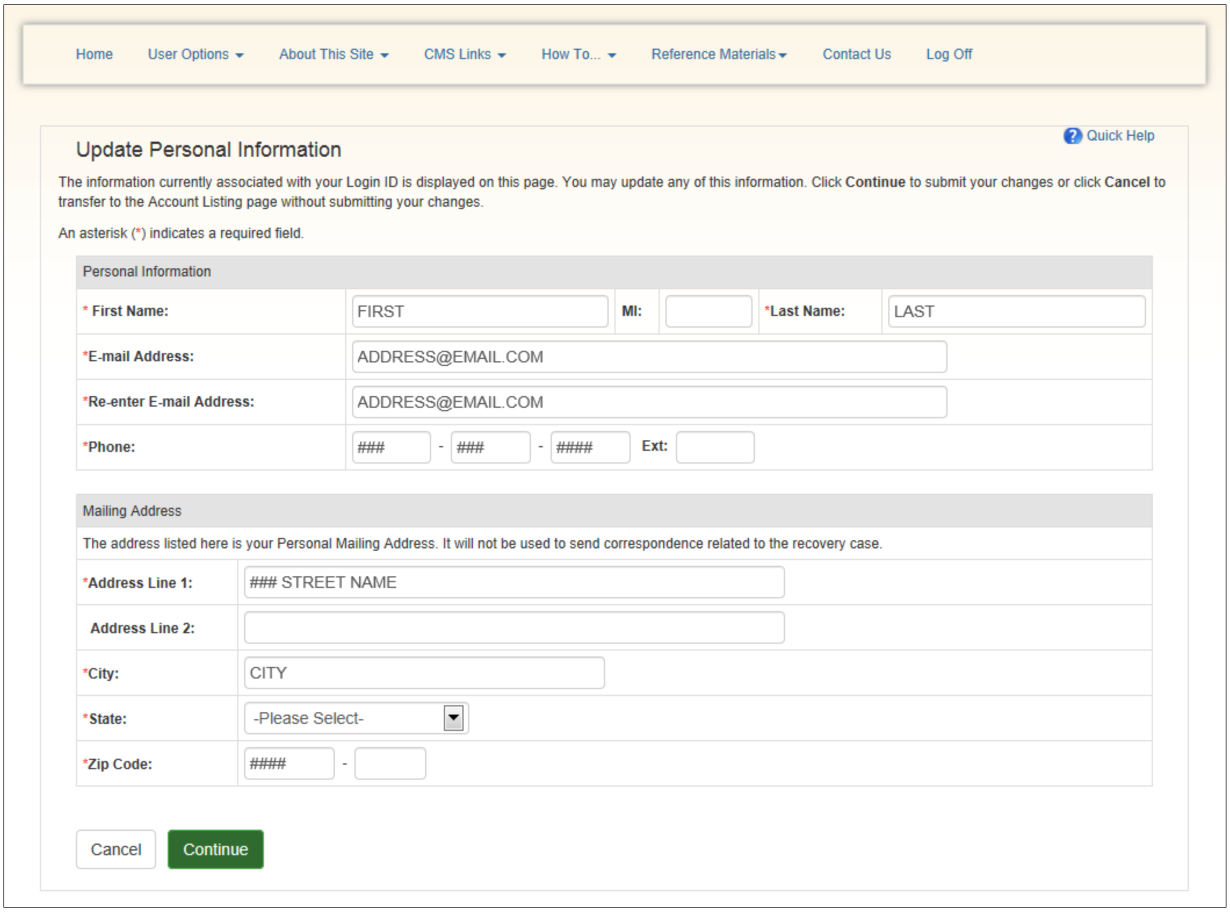


Table 11-1: Update Personal Information Page Fields

Field	Description
First Name	Displays the full first name associated to the Login ID on the account in an editable field. This field is alphabetic and can only contain letters, hyphens (-), and apostrophes (‘). You can enter up to 15 characters.
MI	Displays the middle initial associated to the Login ID on the account in an editable field. You can enter only one letter. This field is optional.
Last Name	Displays the last name associated to the Login ID on the account in an editable field. This field is alphabetic and can only contain letters, hyphens (-), and apostrophes (‘). You can enter up to 24 characters.
E-mail Address	Displays the e-mail address associated to the Login ID on the account in an editable field. This field must contain an @ sign followed by a valid extension (i.e., .org, .com, .net, etc.)
Re-enter E-mail Address	Re-enter the e-mail address from the previous field. This must exactly match the information entered in the *E-Mail Address* field.

Field	Description
Phone + Ext.	Displays the full 10-digit phone number (with the area code) plus an optional extension associated to the Login ID on the account in an editable field. The *Phone* field is numeric with no spaces.
Address Line 1	Displays the address associated to the Login ID on the account in an editable field. You can enter up to 32 characters in this field. The address field must contain, at a minimum, at least two characters with 1 number and 1 letter.
Address Line 2	Displays additional address information associated to the Login ID on the account in an editable field. You can enter up to 32 characters in this field. This is an optional field.
City	Displays the city associated to the Login ID on the account in an editable field. This field can only contain letters, spaces, apostrophes, periods, hyphens, and colons.
State	Displays the previously selected state associated to the Login ID in the drop-down menu.
Zip Code	Displays the 5-character Zip code and Zip+4 associated to the Login ID on the account in an editable field. These fields are numeric. They cannot contain letters, spaces, or special characters. The Zip+4 field is optional.
Cancel	This button returns you to the *Account Listing* page, and your personal information reverts to the previously saved version.
Continue	This button validates the entered information, saves the update in the system, and takes you to the *Personal Information Update Confirmation* page.

Figure 11-3: Personal Information Update Confirmation Page

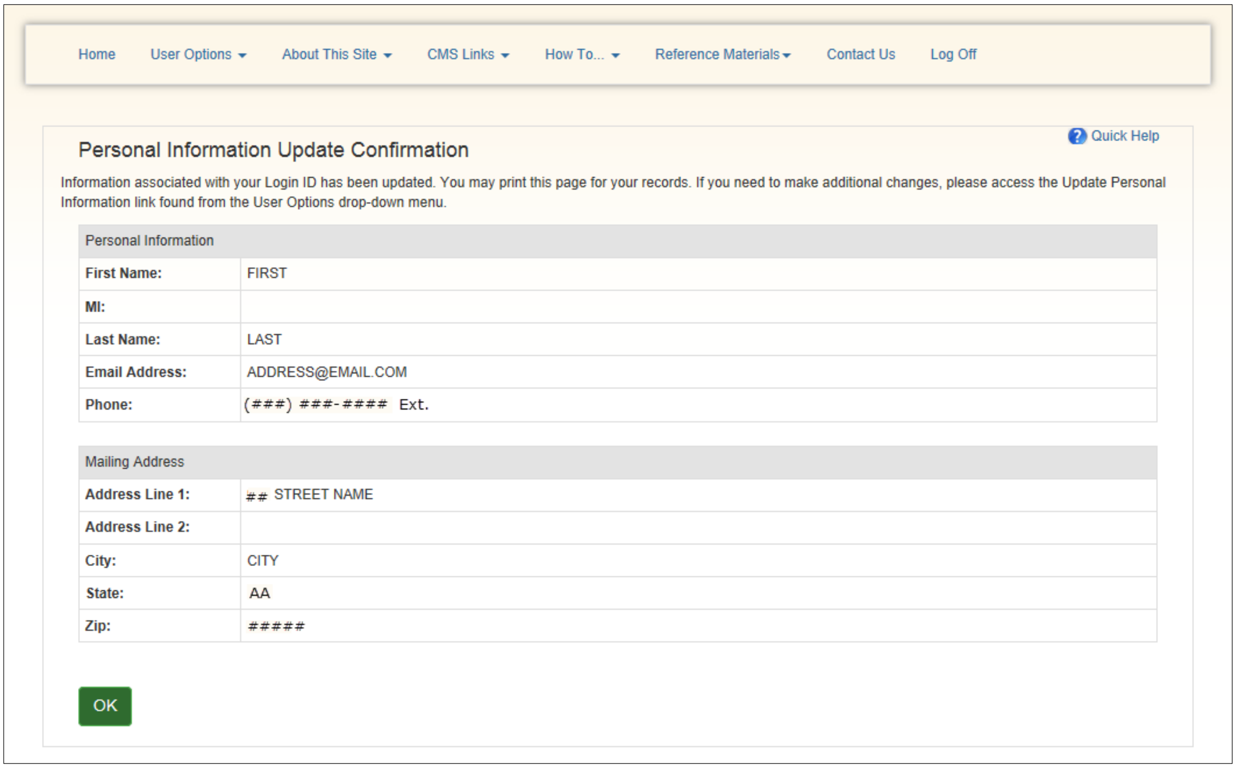


Table 11-2: Personal Information Update Confirmation Page Fields

Field	Description
First Name	Displays the full first name associated to the Login ID on the account in read-only format.
MI	Displays the middle initial associated to the Login ID on the account in read-only format.
Last Name	Displays the last name associated to the Login ID on the account in read-only format.
E-mail Address	Displays the e-mail address associated to the Login ID on the account in read-only format.
Phone + Ext.	Displays the full 10-digit phone number (with the area code) plus an optional extension associated to the Login ID on the account in read-only format.
Address Line 1	Displays the address associated to the Login ID on the account in read-only format.
Address Line 2	Displays additional address information o associated to the Login ID n the account in read-only format.
City	Displays the city associated to the Login ID on the account in read-only format.
State	Displays the previously selected state associated to the Login ID in read-only format.
Zip Code	Displays the 5-character Zip code and Zip+4 associated to the Login ID on the account in read-only format.
OK	This button returns you to the *Account Listing* page.

11.1.2 Password Change

To change your password:

1. After logging in to the CRCP, select the **Change Password** link from the *User Options* drop-down menu on the navigation bar.

   The *Change Password* page displays.

2. Enter your current password in the *Current Password* field.
3. Enter the new password in both the *New Password* and the *Re-enter Password* fields.

   See the password requirements in Table 4-8.

4. If you received a temporary password from an EDI Representative, then review your security questions. You can elect to keep or change your questions and answers (Table 11-3).
5. Click **Continue** to change your password and display the *Change Password Confirmation* page (Figure 11-6).

   You can also click **Cancel** to return to the *Account Listing* page without saving changes.

6. On the *Change Password Confirmation* page, click **OK** to return to the *Account Listing* page.

Figure 11-4: Change Password Link

Figure 11-5: Change Password Page

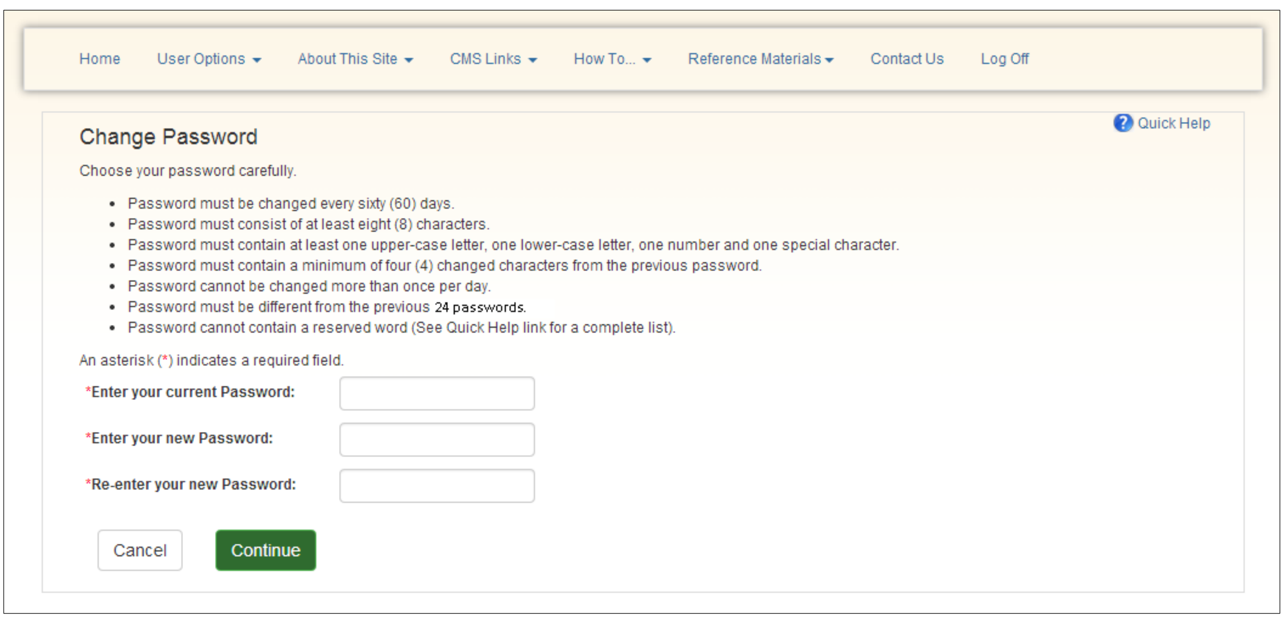
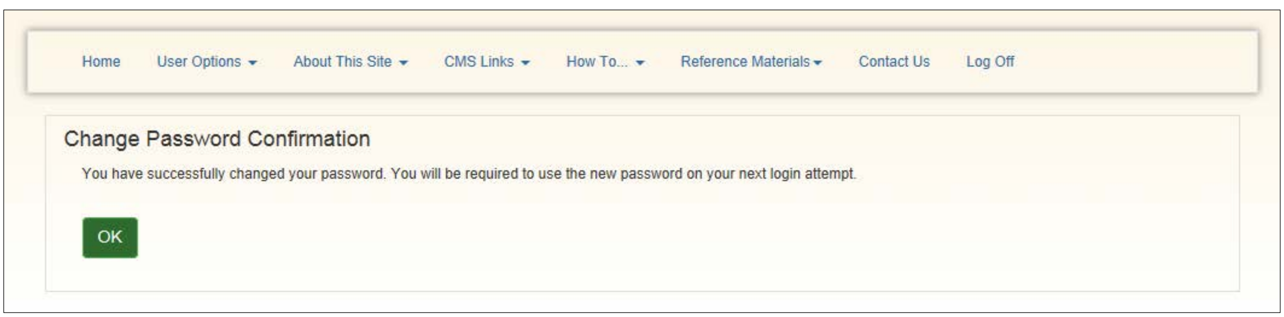


Table 11-3: Change Password Page Fields

Field	Description
Current Password	Enter your current password (the one you are changing).
New Password	Enter your new password. Passwords must: • Be changed every sixty (60) days. • Consist of at least eight (8) characters. • Contain at least one upper-case letter, one lower-case letter, one number, and one special character. • Contain a minimum of four (4) changed characters from the previous password. • Not be changed more than once per day. • Be different from the previous twenty-four (24) passwords. • Not contain a reserved word (see Table 4-8 for a list of reserved words).
Re-enter New Password	Enter the same password from the *Password* field.
Temporary Passwords	When entering a temporary password, review the pre-filled security questions and answers provided.
Security Question 1 Answer 1	To change Security Question #1, select a question from the drop-down menu; then enter the answer in the text field provided. Optional
Security Question 2 Answer 2	To change Security Question #2, select a question from the drop-down menu; then enter the answer in the text field provided. Optional
Cancel	This button cancels the process and returns you to the *Account Listing* page.
Continue	This button changes your password and displays the *Change Password Confirmation* page.

Figure 11-6: Change Password Confirmation Page



11.2 Authorized Representative (AR) Information

In some circumstances, you may need to change information for the AR for your account to either update the current information for the AR or to replace the AR, if necessary. This can include updating an individual's information, or entering brand new information if your AR needs to be replaced with another individual.

The AM can do this on the *Authorized Representative (AR) Information* page after logging in to the account and selecting an account from the *Account Listing* page (see Section 5.2).

> **Note:** If you change the AR, you do not need to complete and sign a new Profile Report.

To update the AR information for an account:

1. From the *Account Detail* page, select the **View or Update Authorized Representative (AR) Information** link from the *User Options* drop-down menu on the navigation bar.

   The *Authorized Representative (AR) Information* page displays.

2. Click **Edit** to display the *Update Authorized Representative (AR) Information* page (Figure 11-9), where you can make changes to the AR's information. You can also click **Cancel** to return to the *Account Detail* page.

3. Make changes to any of the fields on this page. All fields with an asterisk (*) are required.

   Note: You can provide the e-mail address of a user who is already registered as an AR for another CRCP account.

   Click **Continue** to return to the *Authorized Representative (AR) Information* page to view your changes.

4. Click **Continue** on the *Authorized Representative (AR) Information* page when you are done making changes.

   Your updates are saved, and the *Update Authorized Representative (AR) Information Confirmation* page displays (Figure 11-10).

   Click **Cancel** to cancel the operation and return to the *Account Detail* page.

5. Click **OK** on the *Update Authorized Representative (AR) Information Confirmation* page to return to the *Account Detail* page.

Figure 11-7: View or Update Authorized Representative (AR) Information Link

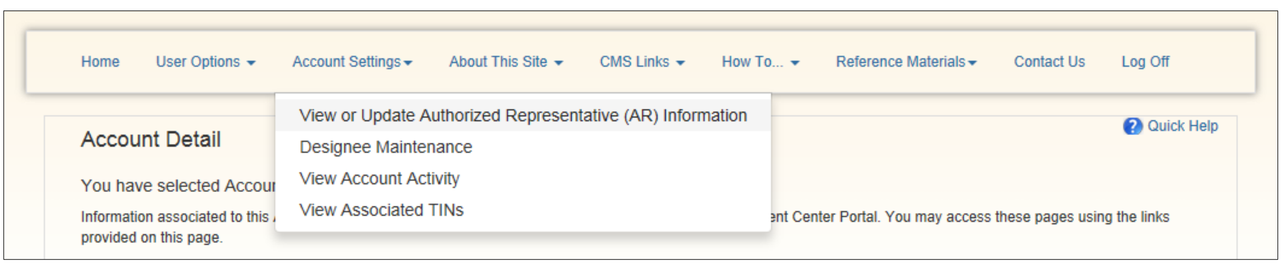


Figure 11-8: Authorized Representative (AR) Information Page

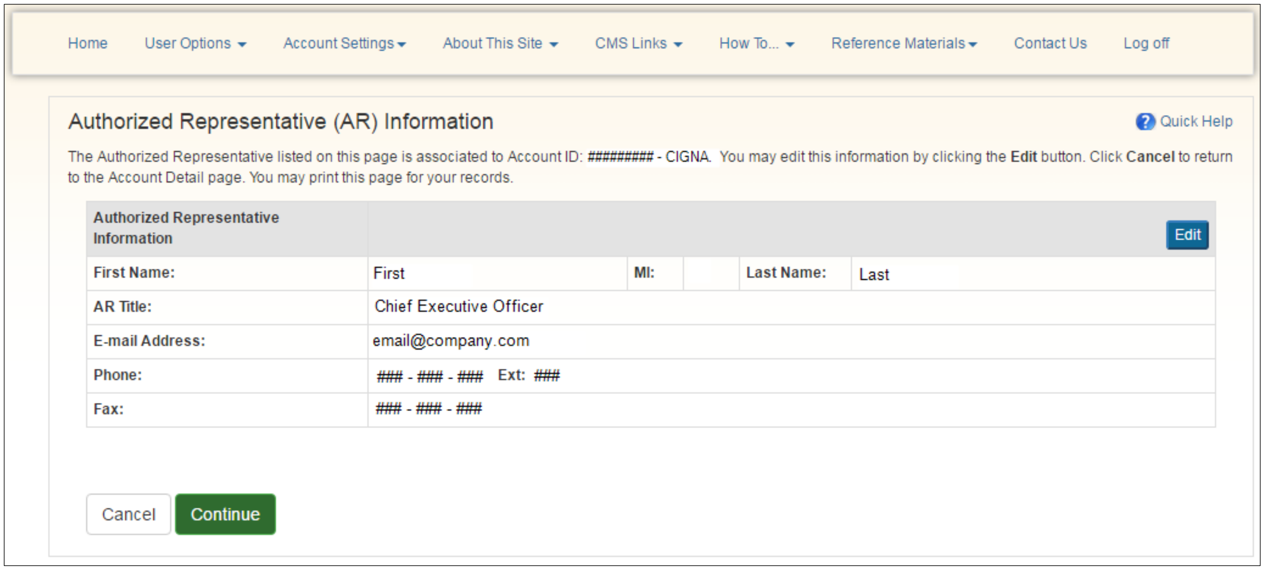


Table 11-4: Authorized Representative (AR) Information Page Fields

Field	Description
Authorized Representative Information	-
Edit	This button displays the *Update Authorized Representative (AR) Information* page, where you can make changes to the AR's information.
First Name	Displays the full first name of the AR for the account.
MI	Displays the middle initial of the AR for the account.
Last Name	Displays the last name of the AR for the account.
Title	Displays the title of the AR for the account.
E-Mail Address	Displays the AR contact e-mail address
Phone	Displays the AR's full 10-digit phone number (with the area code) plus an optional extension.
Fax	Displays the AR's full 10-digit fax number (with the area code).
Continue	This button takes you to the *Update Authorized Representative (AR) Information Confirmation* page.
Cancel	This button cancels the process and takes you to the *Account Detail* page.

Figure 11-9: Update Authorized Representative (AR) Information Page

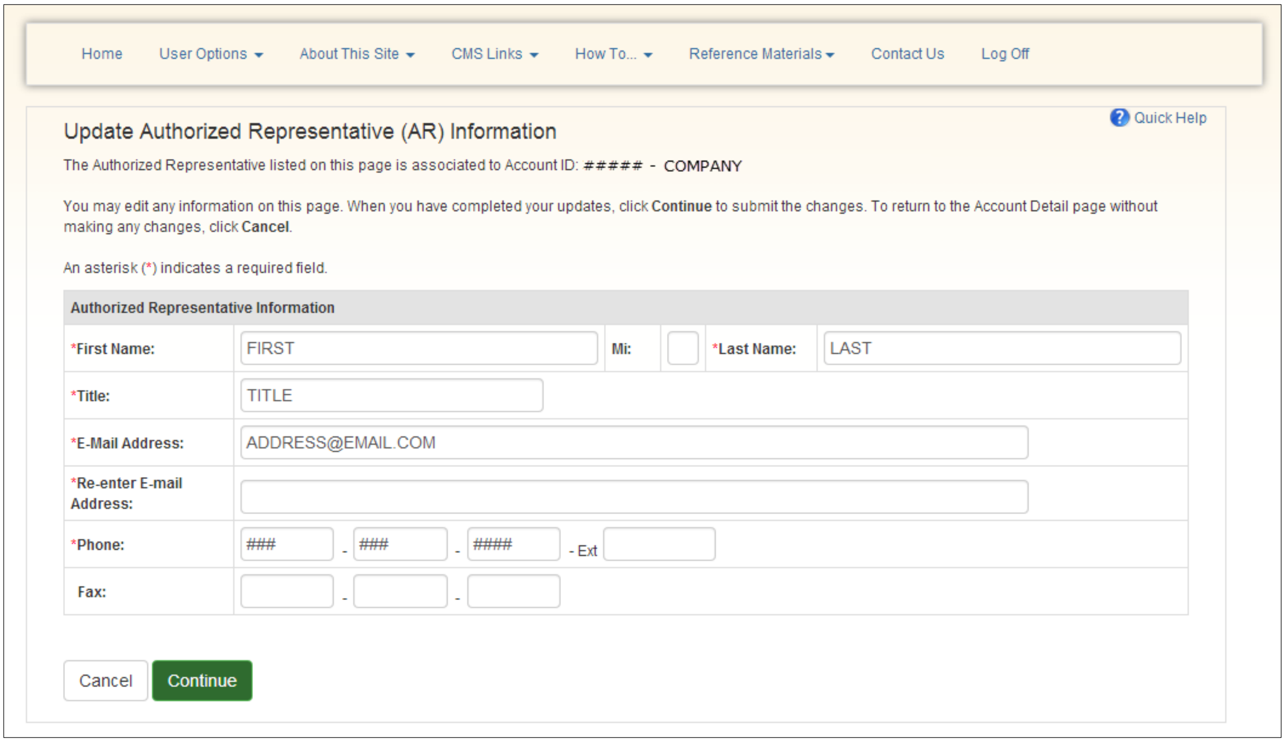
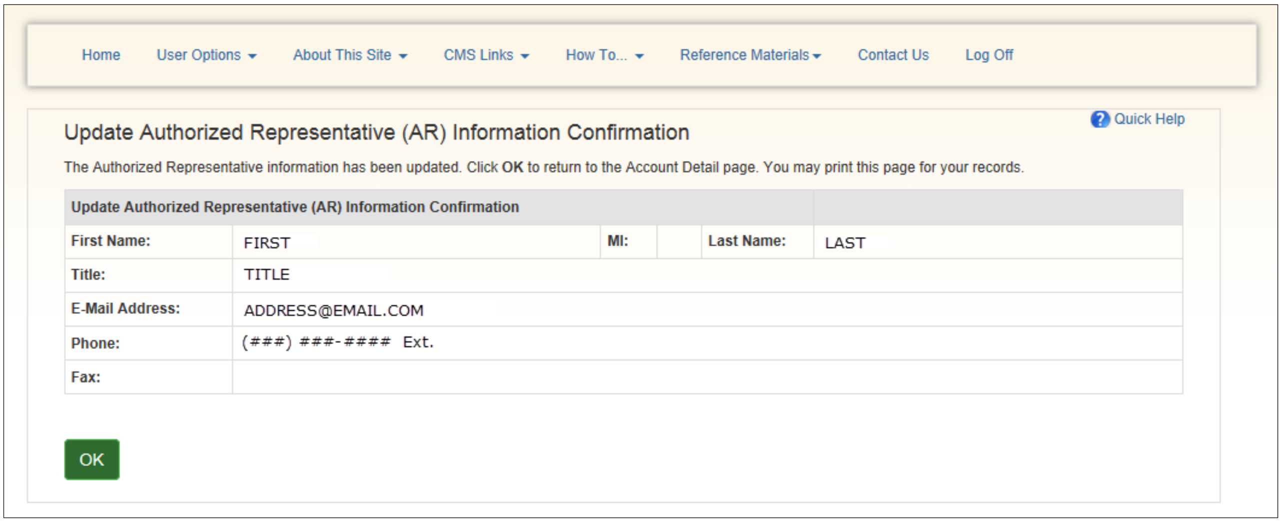


Table 11-5: Update Authorized Representative (AR) Information Page Fields

Field	Description
Authorized Representative Information	-
First Name	Displays the full first name of the AR on the account in an editable field. This field is alphabetic and can only contain letters, hyphens (-), and apostrophes (‘). You can enter up to 15 characters.
MI	Displays the middle initial of the AR on the account in an editable field. You can only enter one letter. This field is optional.
Last Name	Displays the last name of the AR on the account in an editable field. This field is alphabetic and can only contain letters, hyphens (-), and apostrophes (‘). You can enter up to 24 characters.
Title	Displays the title of the AR for this account in an editable field. This field is alphabetic and can only contain letters.
E-Mail Address	Displays the e-mail address of the AR on the account in an editable field. This field must contain an @ sign followed by a valid extension (i.e., .org, .com, .net, etc.)
Re-enter E-mail address	Re-enter the e-mail address from the previous field. This must exactly match the information entered in the *E-Mail Address* field.
Phone + Ext	Displays the full 10-digit phone number (with the area code) plus an optional extension for the AR on the account in an editable field. The *Phone* field is numeric with no spaces.

Field	Description
Fax	Displays the full 10-digit fax number (with the area code) in an editable field for the AR. The *Fax* field is numeric with no spaces, and is optional.
Cancel	This button cancels the operation and takes you to the *Account Detail* page.
Continue	This button saves your changes and takes you to the *Update Authorized Representative (AR) Information Confirmation* page.

Figure 11-10: Update Authorized Representative (AR) Information Confirmation Page



11.3 Account Manager (AM) Replacement

Your Account Manager (AM) is the individual who controls the administration of an organization’s account and manages the overall submission process.

If you have already registered an AM during the account setup process and need to register a new AM, contact an EDI Representative. This information cannot be changed on the CRCP.

> **Note:** EDI Representatives are available to assist you Monday through Friday, from 9:00 a.m. to 5:00 p.m., Eastern Time, except holidays, at: (646) 458-6740. Or contact them by e-mail at COBVA@GHIMedicare.com. See Section 2.5.5.1 for information on contacting the EDI Representative.

After making the change, the EDI Representative will send the new AM an e-mail with instructions for completing the registration process, as outlined in Section 4.3.

Chapter 12: Troubleshooting Error Messages

12.1 Common Error Messages

The tables below list some common error messages in the CRCP, the reason why you may see each message, and steps you can take to resolve the error.

Table 12-1: Registration Errors

Error	Error Text	Explanation of Error	How to Resolve
Account Designee E-Mail Address Matches Authorized Representative or Account Manager E-Mail Address	AD e-mail address is already registered.	You entered an e-mail address that is already in use by the AR or AM for this CRCP account. If you are an AR or AM for a CRCP account, you cannot register as an AD for the same account.	Use a different e-mail address to register.
Account Manager and Authorized Representative E-Mail Addresses Match	AM e-mail address is already registered. AR e-mail address is already registered.	You entered an e-mail address that is already associated as an AR for a CRCP account. If you are an AR for a CRCP account, you cannot register as an AM or AD in the CRCP.	Use a different e-mail address to register for the other role.
Account ID Cannot Be Setup	Account ID cannot be set up; please contact an EDI Representative for more information.	The account registration could not be validated.	Please contact an EDI Representative at (646) 458-6740 for additional information.
Account PIN Error	Invalid Account/PIN combination	You entered an invalid TIN, account type, letter ID, and key data combination. After three failed attempts, the PIN Request process is suspended for the session.	Check that the TIN, account type, letter ID, and key data match a corresponding TIN and reenter. If the request is suspended, contact the CRC for assistance (see section 2.5.5.2).
Login ID Already Registered	User name already taken; please choose another.	You entered a Login ID that already exists in the system.	Select another login ID (must be 7 characters with the following format: AA###AA).
No Match Found	No match found for submitted data. Please try again.	Your search criteria did not return any results.	Refine your search criteria data.

Error	Error Text	Explanation of Error	How to Resolve
PIN Locked	The PIN has been locked; please contact an EDI Representative for assistance.	You have attempted to perform Account Setup 3 consecutive times with an invalid Account ID/PIN combination, and your PIN has become locked.	Contact an EDI Representative at (646) 458-6740 for assistance.

Table 12-2: Login Errors

Error Message	Error Text	Explanation of Error	How to Resolve
Account Locked	The Account has been locked; please contact an EDI Representative at (646) 458-6740 for assistance.	You have attempted to log into your account three consecutive times with an incorrect password.	Click the **Forgot Password** link and answer your security questions. If you have problems with this process, contact an EDI Representative at (646) 458-6740 to unlock your account.
Disassociated Error	Your Login ID is no longer associated with any accounts.	If your Profile Report was not returned before the deadline, your account was deleted. If you were an AM or AD and only had access to one CRCP account, your Login ID is no longer associated with any account and you have lost access to the CRCP.	Contact an EDI Representative at (646) 458-6740.
Expired Password Account	Your password has expired. Please change your password.	Your password must be changed every sixty (60) days in order not to expire. The new password must be different from the previous 6 passwords.	Contact an EDI Representative at (646) 458-6740if you have problems with this process.
Inactive Login ID	The user account with the given e-mail address is Inactive.	You have attempted to log into your account after 180 days of inactivity.	Click the **Forgot Password** link and answer the security questions. You will receive an e-mail with a temporary password once the account has been reactivated. If you have problems with this process, contact an EDI Representative at (646) 458-6740.

Error Message	Error Text	Explanation of Error	How to Resolve
Invalid Login ID/PW	Invalid Login ID/Password.	You entered an invalid Login ID and password combination (the Login ID could be incorrect, the password could be incorrect, or both could be incorrect). The error message does not specify which field was incorrect.	Check that your Login ID and password were entered correctly.
Deleted Account	The user account with the given e-mail address is deleted.	Your Account ID has been deleted because a signed Profile Report has not yet been received.	Contact your Account Manager (AM) to perform the account setup again.

Table 12-3: Other Errors

Error	Error Text	Explanation of Error	How to Resolve
Demand Letter Type Debt Due	Total debt due must be entered when the Demand Letter Type is selected.	The total debt due has not been entered.	Enter the total debt due, which must be numeric and include both dollars and cents.
File Upload Error	File must be in .PDF or .TIF format. File contains a virus and cannot be uploaded. File size cannot exceed 40 MB.	You have uploaded a file that is greater than 40 MB, is an invalid file type, or contains a virus.	Ensure the file type is PDF/TIF, virus free, and less than 40 MB large.
PPN Status	The selected PPN is no longer available for submission because another user has submitted a PPN response while you were in process with your changes. Please click Cancel to return to the PPN Listing page and review the current status for this PPN Letter ID.	The PPN Status of the selected PPN Letter ID is “File Pending Submission.” This may be due to another user working on this PPN at the same time.	Return to the PPN Listing page and attempt your updates again.
Search Validation	No search criteria have been entered.	The search criteria have not been entered.	Enter search criteria in the appropriate fields.

12.2 Concurrent Sessions

If you log in two times without logging out, you will have concurrent sessions running. You will receive an error message on the *Concurrent Session Detected* page.

Click the **Continue** button to close the original session and continue with your process.

Figure 12-1: Concurrent Sessions Detected Page

Table 12-4: Concurrent Sessions Detected Page Fields

Field	Description
Cancel	This button takes you to the *Login Warning* page and does not terminate the existing login session.
Continue	This button takes you to the *Account Listing* page and does terminate the existing login session.

Appendix A: Index of Common Functions

Table A-1: Index of Common Functions

How Do I….	See Section
Access and Login Topics	-
Access the CRCP	Chapter 3
Log in to the CRCP	3.1
Log off the CRCP	5.3
Request a PIN	4.2
Obtain a forgotten login ID	5.1.2.1
Register/set up a CRCP account	4.3.2
Reset a forgotten password	5.1.2.2
User Management Topics	-
Change my password	11.1.2
Change my personal information	11.1.1
Add/Invite an Account Designee	7.2.1.1
Delete an Account Designee	7.2.1.3
Edit an Account Designee's information (before they have registered)	7.2.1.2
Register as an Account Designee	7.3
Replace the Account Manager	11.3
Replace the Authorized Representative	11.2
Help Topics	-
Contact an EDI Representative	2.5.5.1
Contact the CRC	2.5.5.2
Navigate the CRCP	Chapter 6
Account Review Topics	-
Request access to information not currently displayed in my CRCP account (Request Letter Access function)	8.4
View TINs associated to an account	8.6
View recent account activity	8.5
Select an Account ID	8.2
Demand, Defense, and Case Information Topics	-
View case information	9.5
View list of submitted defenses and associated beneficiaries	9.3

How Do I….	See Section
Submit a defense document	9.4
Search for a defense document that was submitted on the CRCP	9.3.1
Search for a demand letter	9.2.3
Primary Payment Notice (PPN) Topics	-
Submit a PPN worksheet file	10.4.1
Submit a PPN Data Entry Response	10.4.2
Search for a PPN	10.3
Upload a PPN worksheet file	10.4.1
View PPNs associated with an account	10.2

Appendix B: Acronyms

Table B-1: Acronyms

Term	Definition
AD	Account Designee
AM	Account Manager
AR	Authorized Representative
BCRC	Benefits Coordination & Recovery Center
CMS	Centers for Medicare & Medicaid Services
COBSW	Coordination of Benefits Secure Web Site
CRC	Commercial Repayment Center
CRCP	Commercial Repayment Center Portal
DUA	Data Use Agreement
EDI	Electronic Data Interchange
GHP	Group Health Plan
HICN	Health Insurance Claim Number
MSP	Medicare Secondary Payer
MSPRP	Medicare Secondary Payer Recovery Portal
PII	Personally Identifiable Information
PIN	Personal Identification Number
PPN	Primary Payment Notice
TIN	Tax Identification Number
TPA	Third Party Administrator
WCMSAP	Workers' Compensation Medicare Set-Aside Arrangement Portal

Appendix C: Previous Version Updates

Version 1.6

To reduce password reset phone calls to the Electronic Data Interchange (EDI) Representatives, the *Change Password* page now requires users to change or keep their pre-filled security questions when using a temporary password. See Section 11.1.2.

To prevent system errors, a limit was established on the number of letters displayed on the *Demand Listing* and *PPN Listing* pages. If there are over 100 letters returned when a search is performed, only the first 100 letters matching your search criteria will display. See Sections 9.1 and 10.2.

A new field, *Date Closed*, has been added to the *Demand Detail* and *Case Information* pages to identify when a case was closed. See Sections 9.2, 9.5, and 10.2.

Changes have been made to maintain search results on the *Demand Detail* page after the user clicks a **Case ID** hyperlink on the *Case Information* page to view beneficiary information. Clicking **Previous** on the *Case Information* page will return to the search results on the *Demand Detail* page. In addition, a *Case Viewed* column has been added to the *Demand Detail* page. See Section 9.2.

A *Viewed* column has been added to the *Demand Listing* page, the *Defense History* tab on the *Case Information* page, and the *PPN Listing* page. The *Viewed* column helps you identify when new Demands or PPNs have been added to the account. See Sections 9.1, 9.5.3, and 10.2.

To assist with the work allocation of cases associated with a Demand, a new field, *Number of Cases,* has been added to the *Demand Listing* page as part of the search results. See Section 9.1.

A **Demand Listing** button has been added to the *Case Information*, *Submitted Defense Documents*, and *PPN Listing* pages for simpler navigation back to the *Demand Listing* page. See Sections 9.3.1, 9.5, and 10.2.

Version 1.5

Users can be assigned multiple roles for different accounts.

- An Account Designee (AD) for an existing CRCP account can be reassigned as the AM for the same account by contacting an Electronic Data Interchange (EDI) Representative. However, a user cannot be an AM and an AD for the same account (Section 2.4.3.)

The *Request Letter Access* page text has been updated to inform users to enter the Taxpayer Identification Number (TIN) (Section 8.4).

The following system functions have been corrected:

An existing CRCP Authorized Representative (AR) can become the AR for multiple CRCP accounts (Section 2.4.1).

An AM can replace the AR for their account with an existing AR from a different account (Section 2.4.2).

An AM for an account can enter and save the e-mail address of an existing AR on the *Update Authorized Representative (AR) Information* page (Section 11.2).

Version 1.4

Updates were made to the reserved words list. See Chapter 4.

To prevent users from inadvertently getting access to letters they should not view, the *Request Letter Access* function has been updated to include the Tax Identification Number (TIN) as an additional matching criterion. See Chapter 8.

Version 1.3

Password requirements across all Coordination of Benefits Secure Website (COBSW) systems have been updated to ensure rules are consistent. See Sections 4.3.2, 7.3.2, and 11.1.2 for details.

Version 1.2

The system has been updated to reflect the addition of the *No Coverage End Date* column on the *PPN Data Entry* process. Selecting the checkbox indicates that the beneficiary does not have an end date for coverage. The coverage end date remains blank if this box is selected. See Section 10.4.2 for more details.

The *Submitted PPN Worksheet Information* page has been renamed to the *Submitted PPN Data Entry Response Information* page. See Section 10.5.

Version 1.1

On the *PPN Listing* page, the ability to search for a PPN Letter based on a date or date range has changed. The criteria used to search have been updated from the *PPN Letter Sent Date* (*From* and *To*) to the *PPN Response Due Date* (*From* and *To*) fields. Additionally, the default display of PPNs on the *PPN Listing* page has been updated to include all open PPNs (i.e., Open, Work-In-Progress, and File Pending Submission). See Sections 10.2 and 10.3 for more details.

Version 1.0

This version represents the baseline version of the Commercial Repayment Center Portal (CRCP) User Guide.