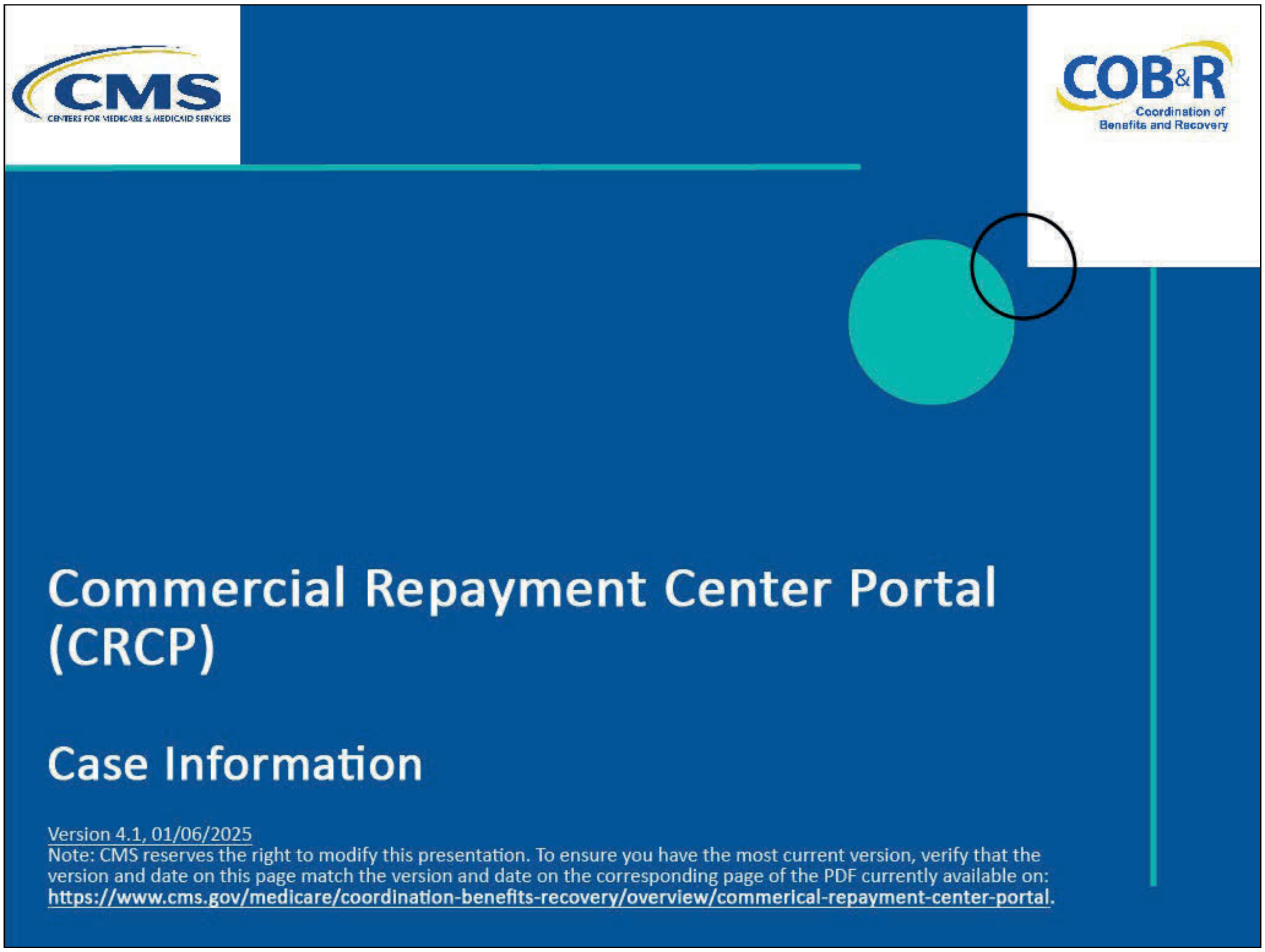
Case Information

Slide 1 of 23 - Case Information



Slide notes

Welcome to the Commercial Repayment Center Portal (CRCP) Case Information course.

Slide 2 of 23 - Disclaimer

Disclaimer

While all information in this document is believed to be correct at the time of writing, this Computer Based Training (CBT) is for educational purposes only and does not constitute official Centers for Medicare & Medicaid Services (CMS) instructions. All affected entities are responsible for following the instructions in the CRCP User Guide found under the *Reference Materials* menu at the following link: https://www.cob.cms.hhs.gov/CRCP/.

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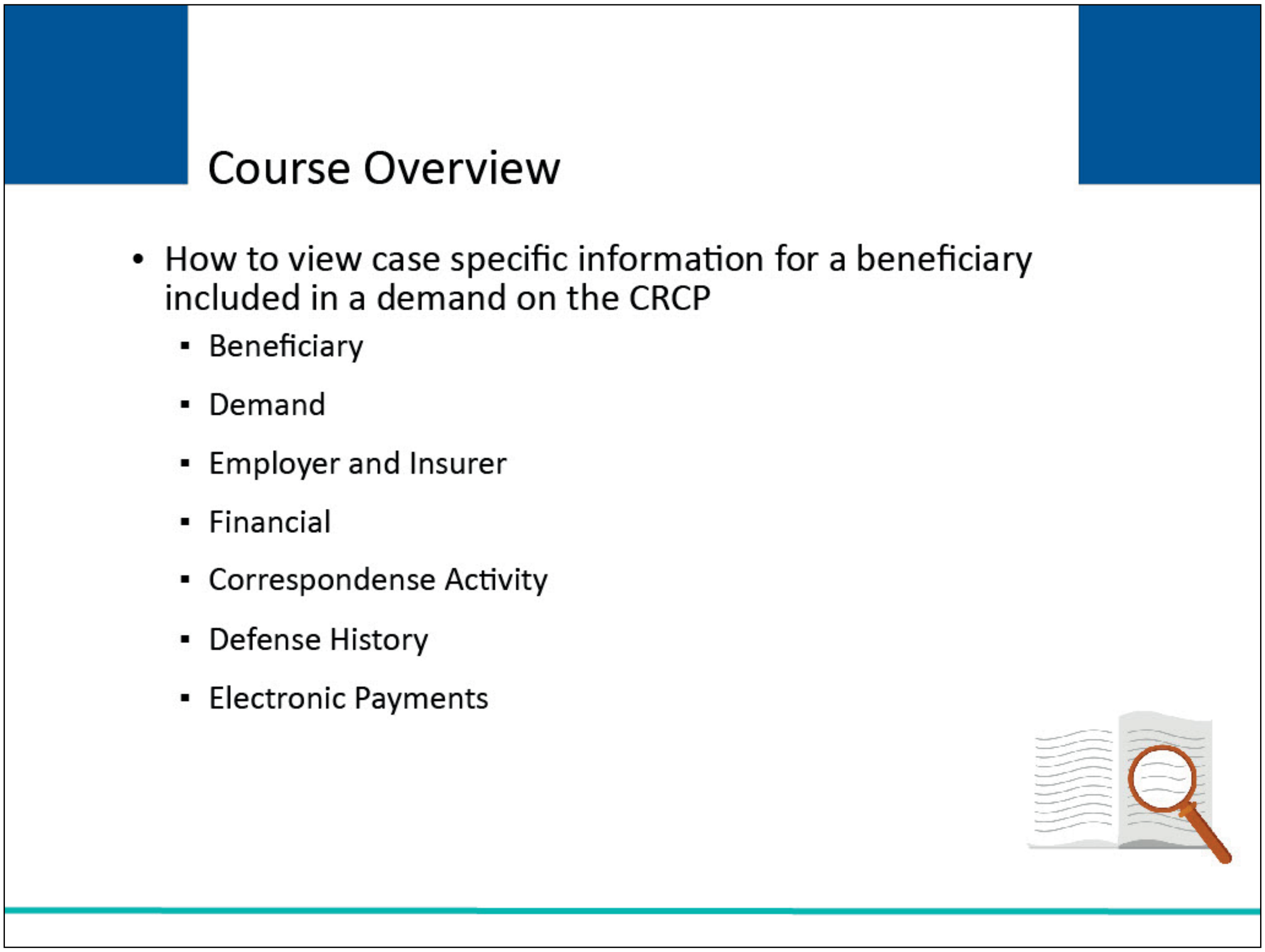
Slide 3 of 23 - Course Overview



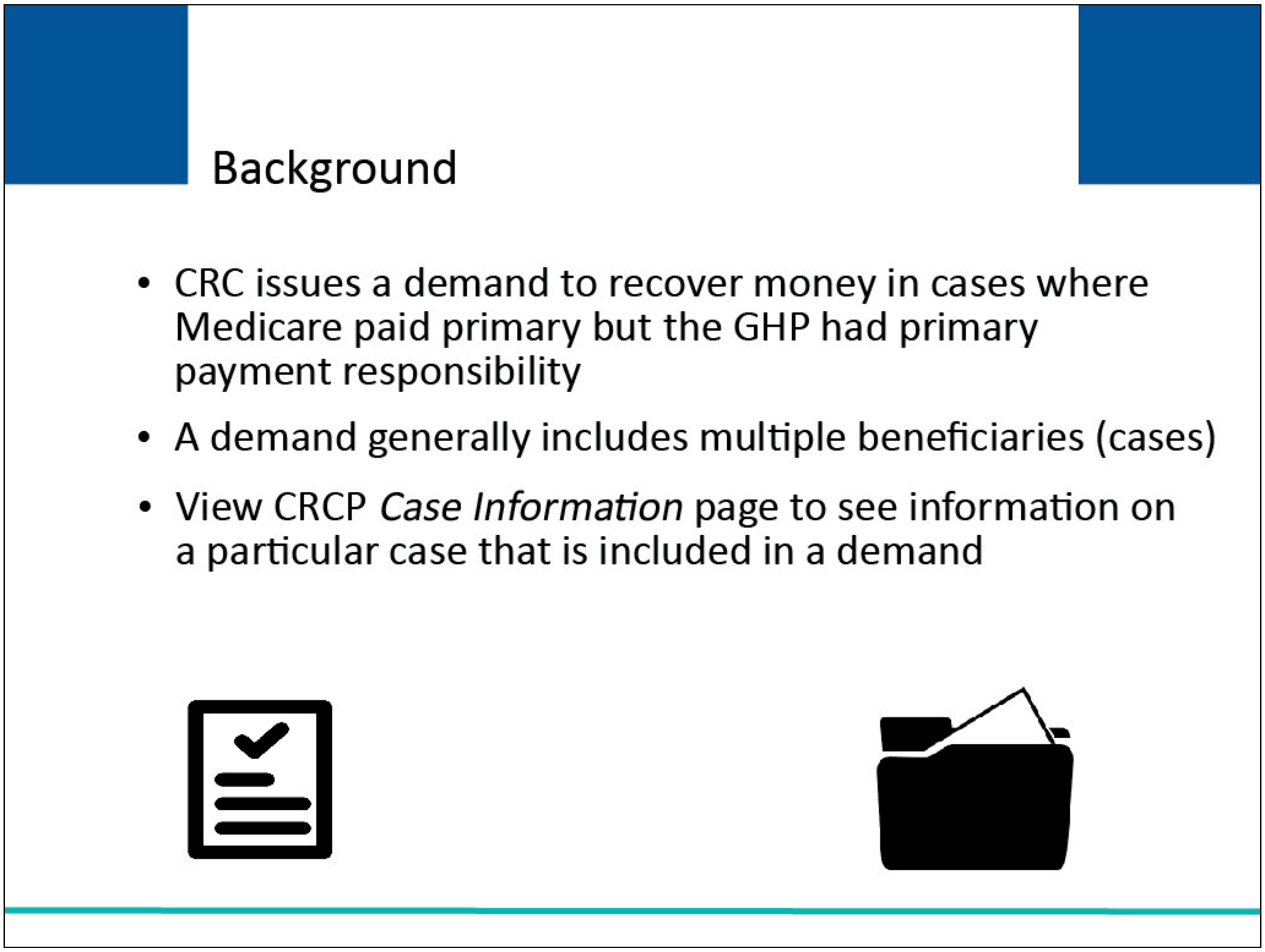
Slide notes

This course will explain how to view case-specific information for a beneficiary included in a demand on the CRCP.

It will describe how to utilize the Case Information page to see the following case-related information:

- Beneficiary,
- Demand,
- Employer and Insurer,
- Financial Summary,
- Correspondence Activity,
- Defense History, and
- Electronic Payments.

Slide 4 of 23 - Background



Slide notes

If Medicare paid primary when the Group Health Plan (GHP) had primary payment responsibility, the Commercial Repayment Center (CRC) will seek repayment on behalf of CMS.

When the CRC issues a demand letter for payment, the demand may include multiple beneficiaries/cases.

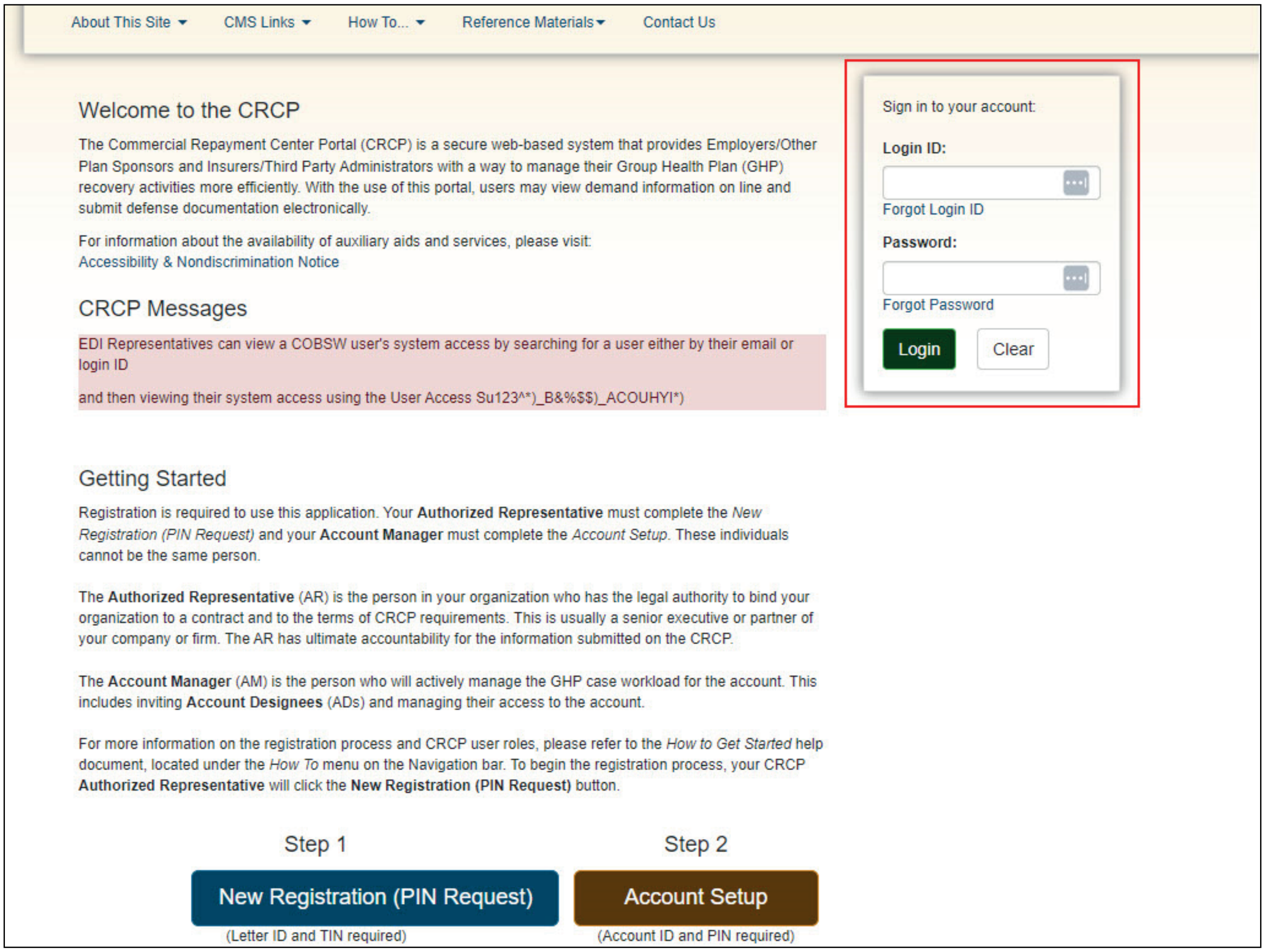
To review information on a particular beneficiary/case that is included in a demand, you will access the Case Information page on the CRCP.

Slide 5 of 23 - Login Warning Page

Slide notes

To review beneficiary or case information, log into the CRCP at the following link: CRCP Website. The Login Warning page will display. Click “I Accept” to continue to Login to the CRCP.

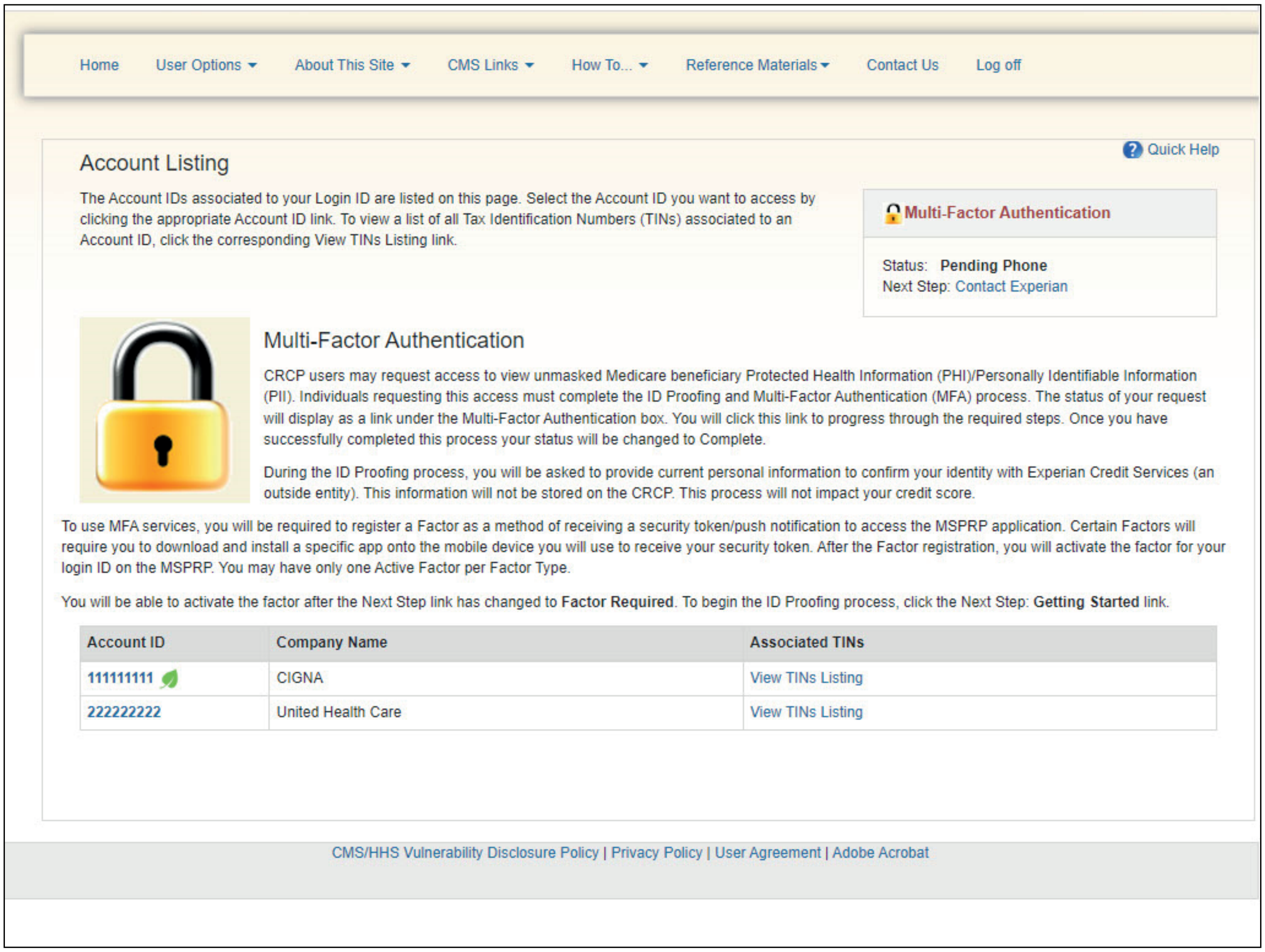
Slide 6 of 23 - Welcome to the CRCP Page



Slide notes

The Welcome to the CRCP page will display along with a section to sign into your account.

Slide 7 of 23 - Account Listing



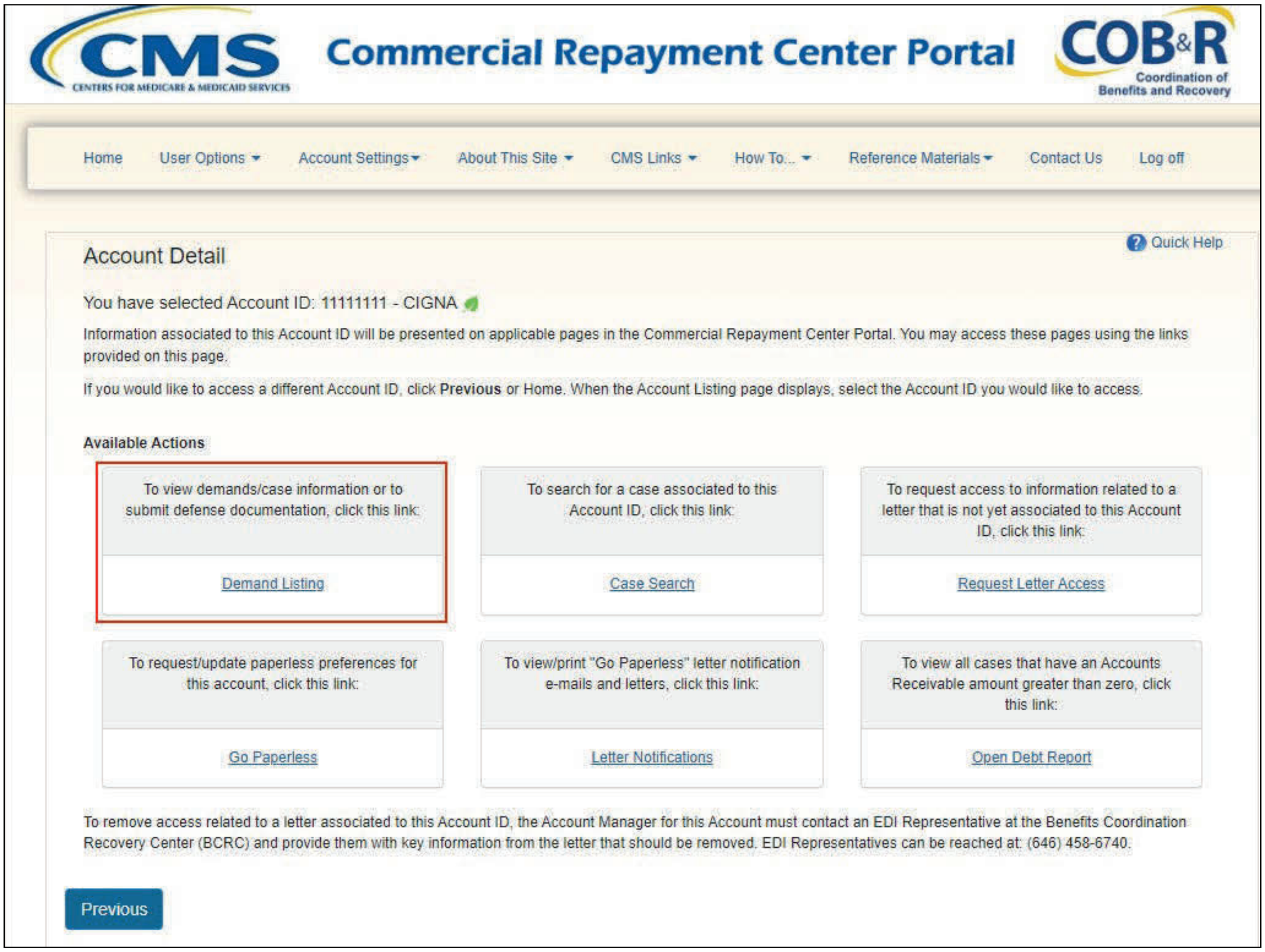
Slide notes

After a successful login, the Account Listing page will display.

This page lists the accounts associated with your Login ID. Select the Account ID link for the account you want to access.

Note: CRCP users may request access to view unmasked Medicare beneficiary Protected Health Information (PHI)/Personally Identifiable Information (PII). Individuals requesting this access must complete the ID Proofing and Multi-Factor Authentication (MFA) process. During the process, the Multi-Factor Authentication Voice Call/Text Message (SMS) factors were previously available options but will only be available for use to view unmasked claim information for a limited time after March 1st, 2025. If you wish to continue to use Multi-Factor Authentication after that time, you will need to register another factor via the Factor Maintenance link found on your home page. The new factor options are Okta Verify and/or Google Authenticator. For more information on MFA, see the Multi-Factor Authentication CBT course.

Slide 8 of 23 - Account Detail

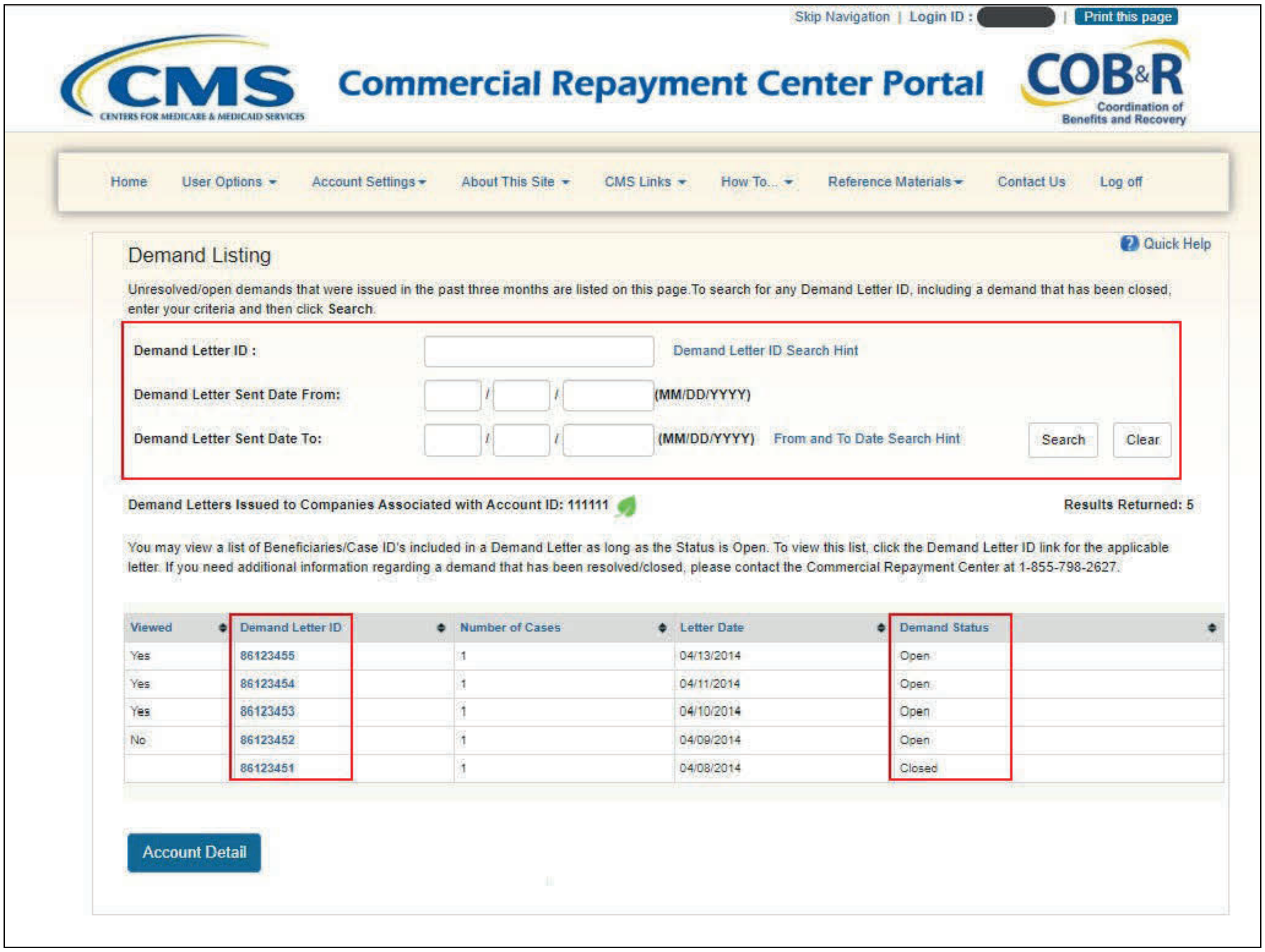


Slide notes

When the Account Detail page displays, click the Demand Listing link.

Note: The Open Debt Report, Go Paperless, and Letter Notifications hyperlinks and associated text is only available for Account Managers.

Slide 9 of 23 – Demand Listing Page



Slide notes

The Demand Listing page appears. By default, this page lists all unresolved/open demands that the CRC has issued in the past three months.

You may search for any Demand Letter ID using the Search function. See the "Demands" CBT for more information.

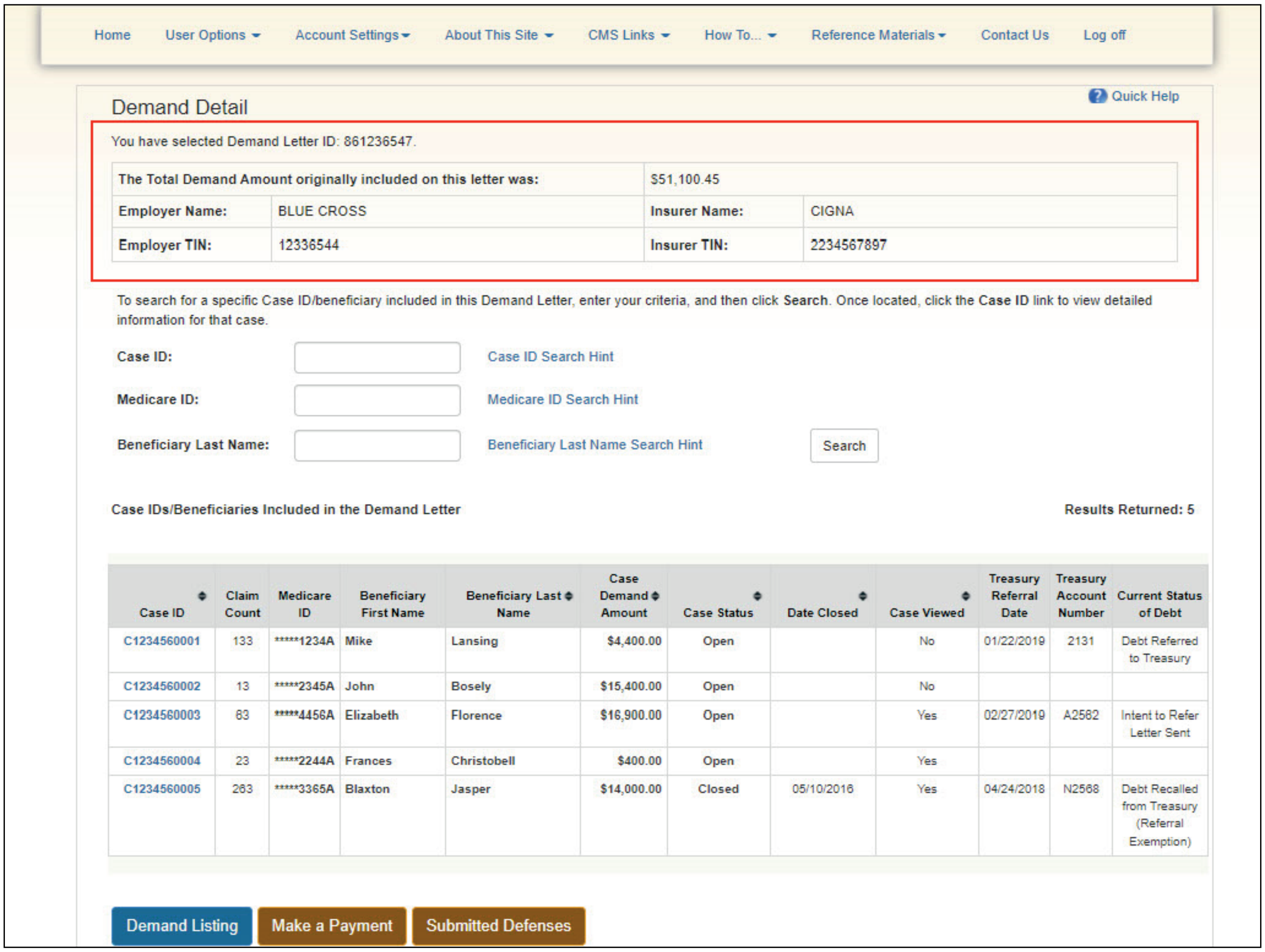
Note: No more than 100 letters will display at any given time.

To view case specific information, first locate the Demand Letter ID that includes the case you want to examine and then click the Demand Letter ID link. Note: This link will only be enabled if the Demand Status is 'Open'.

You will not be able to view beneficiary/case information if the Demand Status is 'Closed'. The Demand Status is 'Closed' when the status of each case included in a Demand Letter ID is 'Closed'.

If you need information regarding a demand that has been closed, contact the CRC at 1-855-798-2627.

Slide 10 of 23 – 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:	12336544	**Insurer TIN:**	2234567897

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

Case ID: Case ID Search Hint

Medicare ID: Medicare ID Search Hint

Beneficiary Last Name: Beneficiary Last Name Search Hint Search

Case IDs/Beneficiaries Included in the Demand Letter **Results Returned: 5**

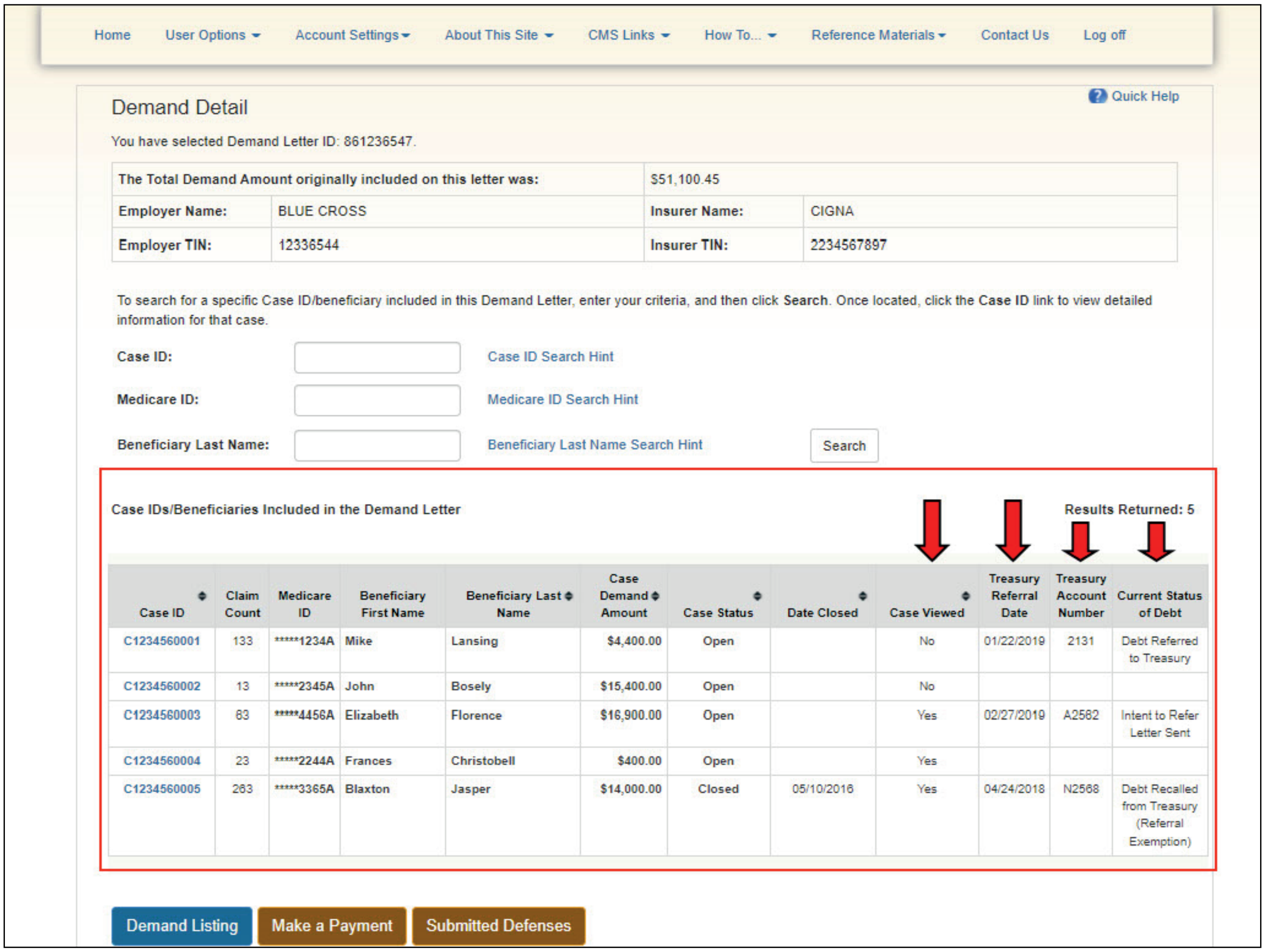
Case ID	Claim Count	Medicare ID	Beneficiary First Name	Beneficiary Last Name	Case Demand Amount	Case Status	Date Closed	Case Viewed	Treasury Referral Date	Treasury Account Number	Current Status of Debt
C1234560001	133	*****1234A	Mike	Lansing	$4,400.00	Open		No	01/22/2019	2131	Debt Referred to Treasury
C1234560002	13	*****2345A	John	Bosely	$15,400.00	Open		No			
C1234560003	63	*****4456A	Elizabeth	Florence	$16,900.00	Open		Yes	02/27/2019	A2562	Intent to Refer Letter Sent
C1234560004	23	*****2244A	Frances	Christobell	$400.00	Open		Yes			
C1234560005	263	*****3365A	Blaxton	Jasper	$14,000.00	Closed	05/10/2016	Yes	04/24/2018	N2568	Debt Recalled from Treasury (Referral Exemption)

Demand Listing | Make a Payment | Submitted Defenses

Slide notes

Once you click the Demand Letter ID link, the Demand Detail page appears.

Slide 11 of 23 - Demand Detail Page



Slide notes

The bottom portion of this page lists all of the beneficiaries/Case IDs included in the demand letter.

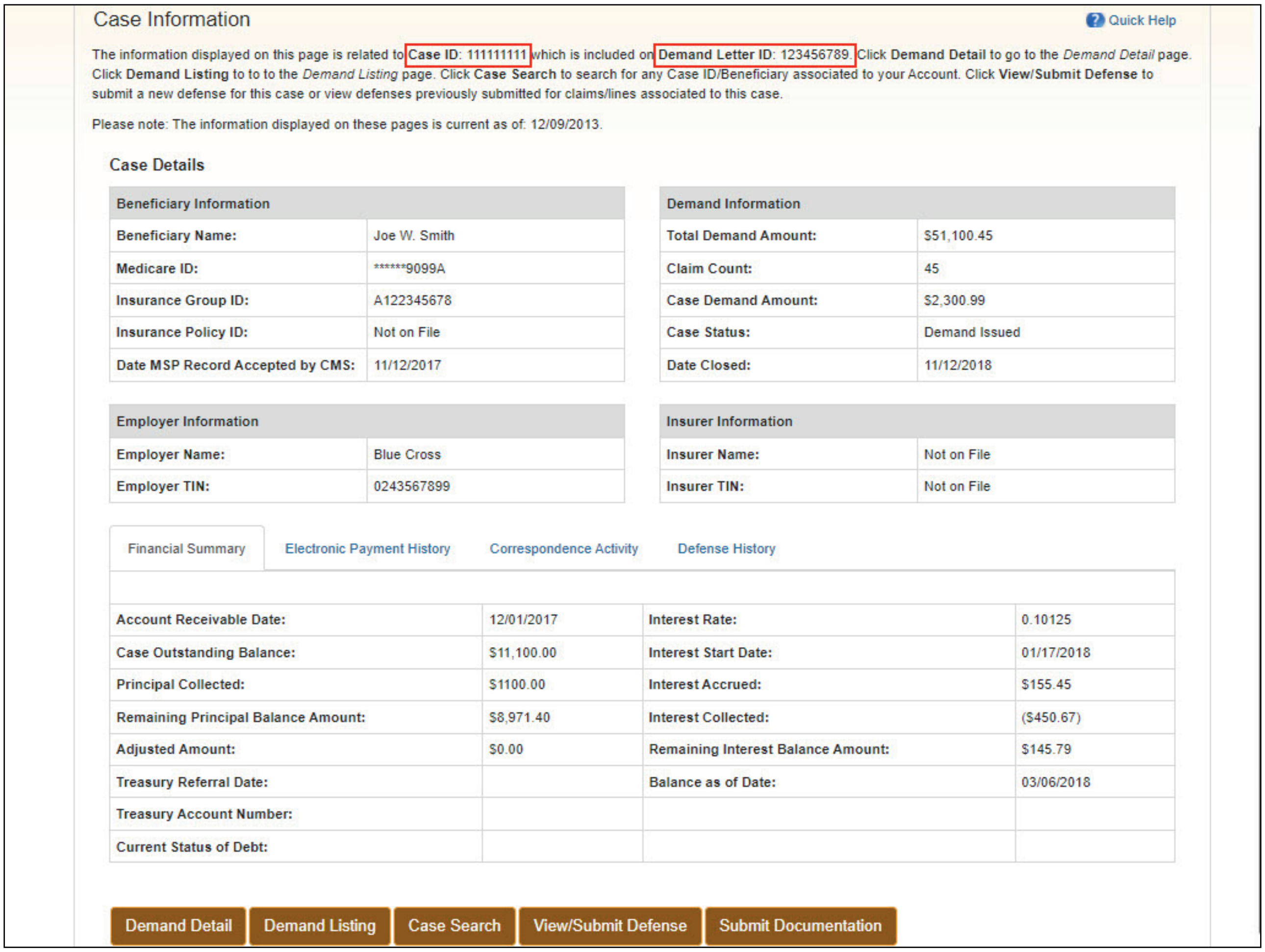
For each beneficiary included in the demand, a masked Medicare ID is displayed along with the Beneficiary Name, Case Amount, Case Status, Date Closed, and Case Viewed fields.

A Case Viewed column was added to this page to help identify when new Demands have been added to the account and a Treasury Referral Date, Treasury Account Number, and Current Status of Debt fields have also been added to provide additional treasury information.

The Make a Payment button and the Submitted Defenses button also display on the Demand Detail page.

Click a Case ID link to view detailed case information for the selected case.

Slide 12 of 23 - Case Information



Slide notes

The Case Information page appears. The Case ID and Demand Letter ID are shown at the top of the page. If you have selected the incorrect Case ID, click Previous to return to the Demand Detail page.

All information included on the Case Information page is current as of the date noted at the top of the page. If you have any questions regarding the information included on this page, please contact the CRC at 1-855-798-2627.

The Case Details section of this page is broken into four sections:

- Beneficiary,
- Demand,
- Employer, and
- Insurer Information.

The Beneficiary Information section includes the Beneficiary's Name, masked Medicare ID, Insurance Group ID, and Insurance Policy ID.

The Demand Information section includes the Total Demand Amount, Case Demand Amount, Case Outstanding Balance, and Case Status.

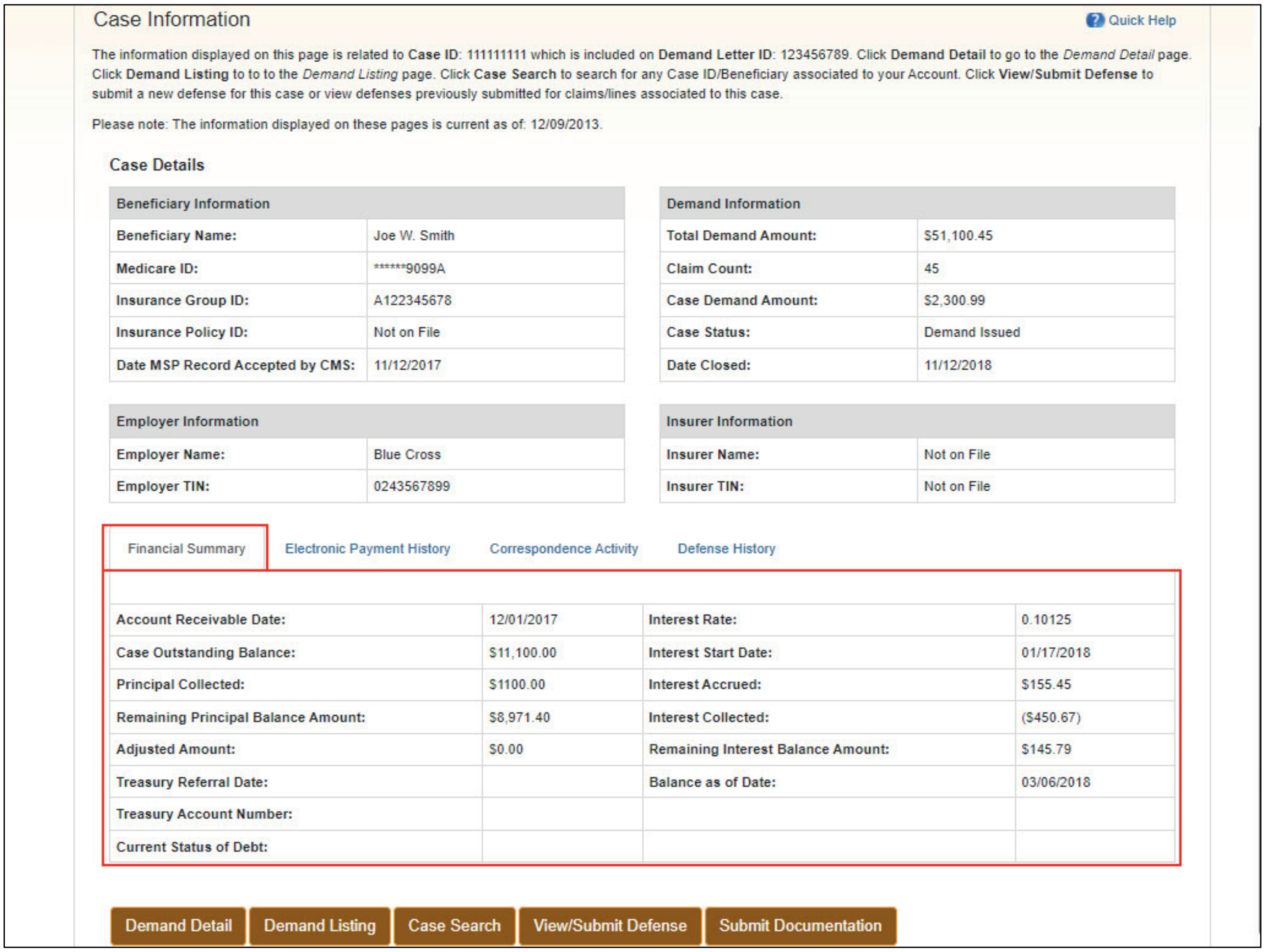
The Employer Information and Insurer Information sections include the company name and Tax Identification Number (TIN) for the employer and the insurer (if it is available).

Note: If there is no data to display for a particular field in the Case Details section, the CRCP will show the phrase ‘Not on File’.

The bottom half of the Case Information page includes tabbed sections where you can view information regarding the financial summary, electronic payment history, correspondence activity, and defense history.

Note: Links/buttons have been added to the Case Information Page for easy access to the Demand Listing page, Case Search page and View/Submit Defenses. Also, certain fields on the Make a Payment and on the Financial Summary Tab on the Case Information pages will now show data reported in real-time from HIGLAS. Additionally, updates have been made to clarify that balance amounts on the Open Debt Report may not reflect recent adjustments and may differ from what is shown on the CRCP case pages.

Slide 13 of 23 - Financial Summary Tab



Case Information

Quick Help

The information displayed on this page is related to **Case ID**: 111111111 which is included on **Demand Letter ID**: 123456789. Click **Demand Detail** to go to the *Demand Detail* page. Click **Demand Listing** to to to the *Demand Listing* page. Click **Case Search** to search for any Case ID/Beneficiary associated to your Account. Click **View/Submit Defense** to submit a new defense for this case or view defenses previously submitted for claims/lines associated to this case.

Please note: The information displayed on these pages is current as of: 12/09/2013.

Case Details

Beneficiary Information	
Beneficiary Name:	Joe W. Smith
Medicare ID:	******9099A
Insurance Group ID:	A122345678
Insurance Policy ID:	Not on File
Date MSP Record Accepted by CMS:	11/12/2017

Demand Information	
Total Demand Amount:	$51,100.45
Claim Count:	45
Case Demand Amount:	$2,300.99
Case Status:	Demand Issued
Date Closed:	11/12/2018

Employer Information	
Employer Name:	Blue Cross
Employer TIN:	0243567899

Insurer Information	
Insurer Name:	Not on File
Insurer TIN:	Not on File

Financial Summary | Electronic Payment History | Correspondence Activity | Defense History

Account Receivable Date:	12/01/2017	Interest Rate:	0.10125
Case Outstanding Balance:	$11,100.00	Interest Start Date:	01/17/2018
Principal Collected:	$1100.00	Interest Accrued:	$155.45
Remaining Principal Balance Amount:	$8,971.40	Interest Collected:	($450.67)
Adjusted Amount:	$0.00	Remaining Interest Balance Amount:	$145.79
Treasury Referral Date:		Balance as of Date:	03/06/2018
Treasury Account Number:			
Current Status of Debt:			

Demand Detail | Demand Listing | Case Search | View/Submit Defense | Submit Documentation

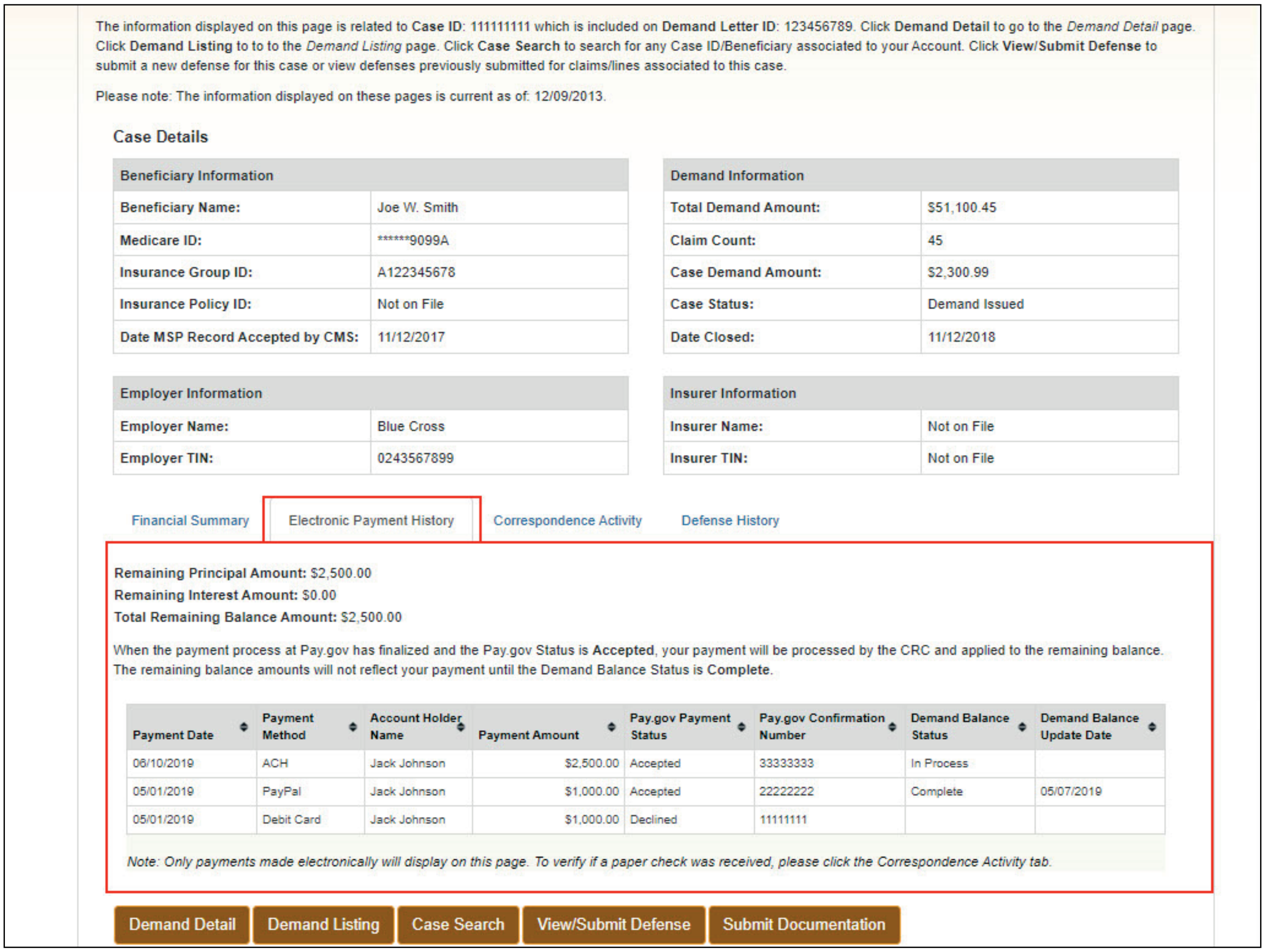
Slide notes

The Financial Summary tab shows the Account Receivable Date, Case Outstanding Balance, Principal Collected, Remaining Principal Balance Amount, Adjusted Amount, Treasury Referral Date, Treasury Account Number, Current Status of Debt, Interest Rate, Interest Start Date, Interest Accrued, Interest Collected, Remaining Interest Balance Amount, and the Balance as of Date.

When the Account Receivable balance goes to zero for a case, the Principal Collected, Adjusted Amount, Interest Accrued, and Interest Collected will display zero in these fields. All other fields will remain unchanged.

Note: The Financial Summary tab now includes three fields that show real-time data from HIGLAS.

Slide 14 of 23 - Electronic Payment History Tab



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Case Details

Beneficiary Information	
Beneficiary Name:	Joe W. Smith
Medicare ID:	******9099A
Insurance Group ID:	A122345678
Insurance Policy ID:	Not on File
Date MSP Record Accepted by CMS:	11/12/2017

Demand Information	
Total Demand Amount:	$51,100.45
Claim Count:	45
Case Demand Amount:	$2,300.99
Case Status:	Demand Issued
Date Closed:	11/12/2018

Employer Information	
Employer Name:	Blue Cross
Employer TIN:	0243567899

Insurer Information	
Insurer Name:	Not on File
Insurer TIN:	Not on File

Financial Summary | Electronic Payment History | Correspondence Activity | Defense History

Remaining Principal Amount: $2,500.00
Remaining Interest Amount: $0.00
Total Remaining Balance Amount: $2,500.00

When the payment process at Pay.gov has finalized and the Pay.gov Status is **Accepted**, your payment will be processed by the CRC and applied to the remaining balance. The remaining balance amounts will not reflect your payment until the Demand Balance Status is **Complete**.

Payment Date	Payment Method	Account Holder Name	Payment Amount	Pay.gov Payment Status	Pay.gov Confirmation Number	Demand Balance Status	Demand Balance Update Date
06/10/2019	ACH	Jack Johnson	$2,500.00	Accepted	33333333	In Process	
05/01/2019	PayPal	Jack Johnson	$1,000.00	Accepted	22222222	Complete	05/07/2019
05/01/2019	Debit Card	Jack Johnson	$1,000.00	Declined	11111111		

Note: Only payments made electronically will display on this page. To verify if a paper check was received, please click the Correspondence Activity tab.

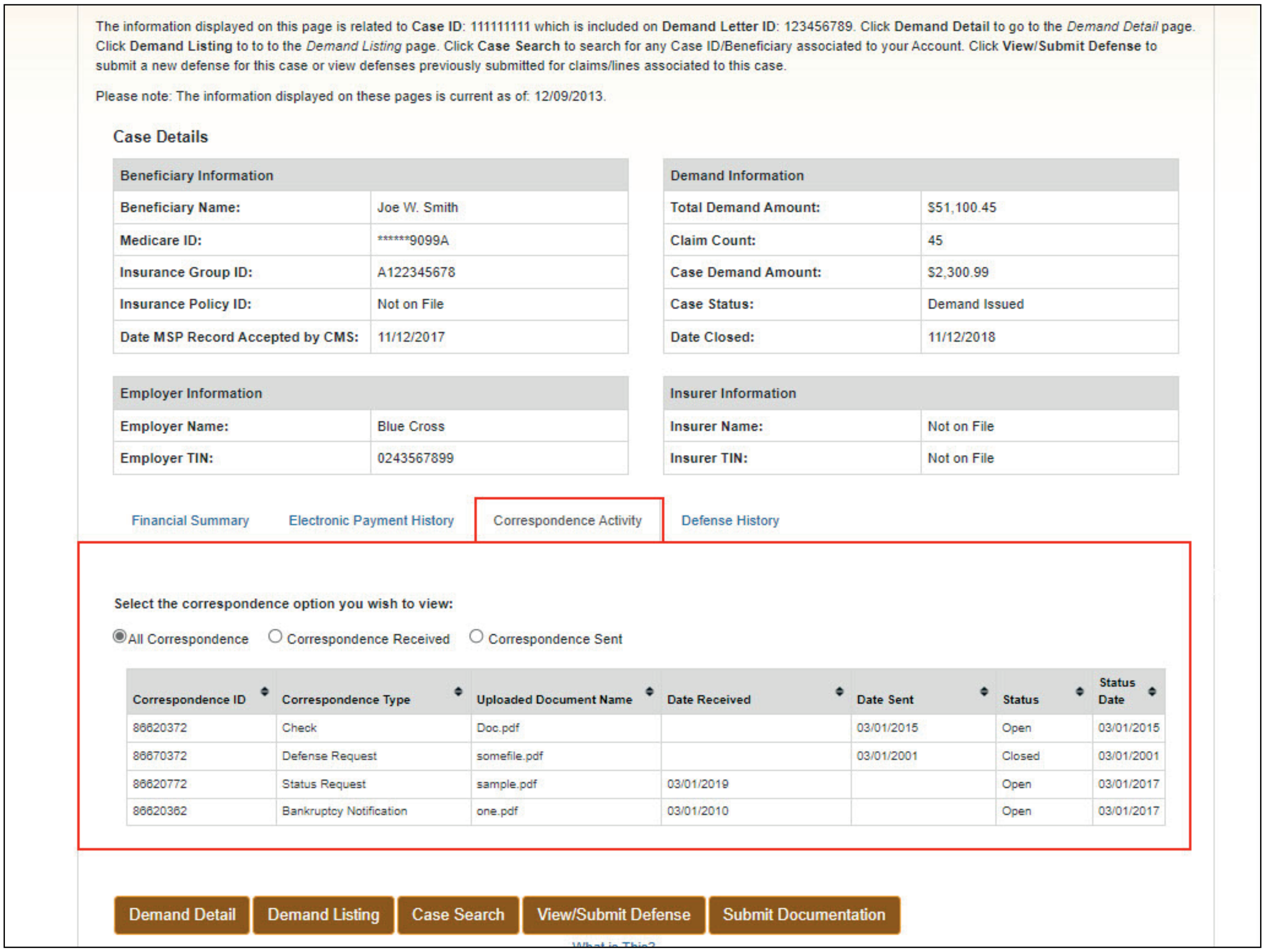
Demand Detail | Demand Listing | Case Search | View/Submit Defense | Submit Documentation

Slide notes

The Electronic Payment History Tab shows the remaining principle amount, remaining interest, and total remaining balance. Additionally, the Pay.gov payment date, method, account holder name, amount, payment status, confirmation number, demand balance status, and the demand balance update date are displayed.

Click any column heading to sort the information displayed. Click Previous at any time to return to the Demand Detail page.

Slide 15 of 23 – Correspondence Activity Tab



Slide notes

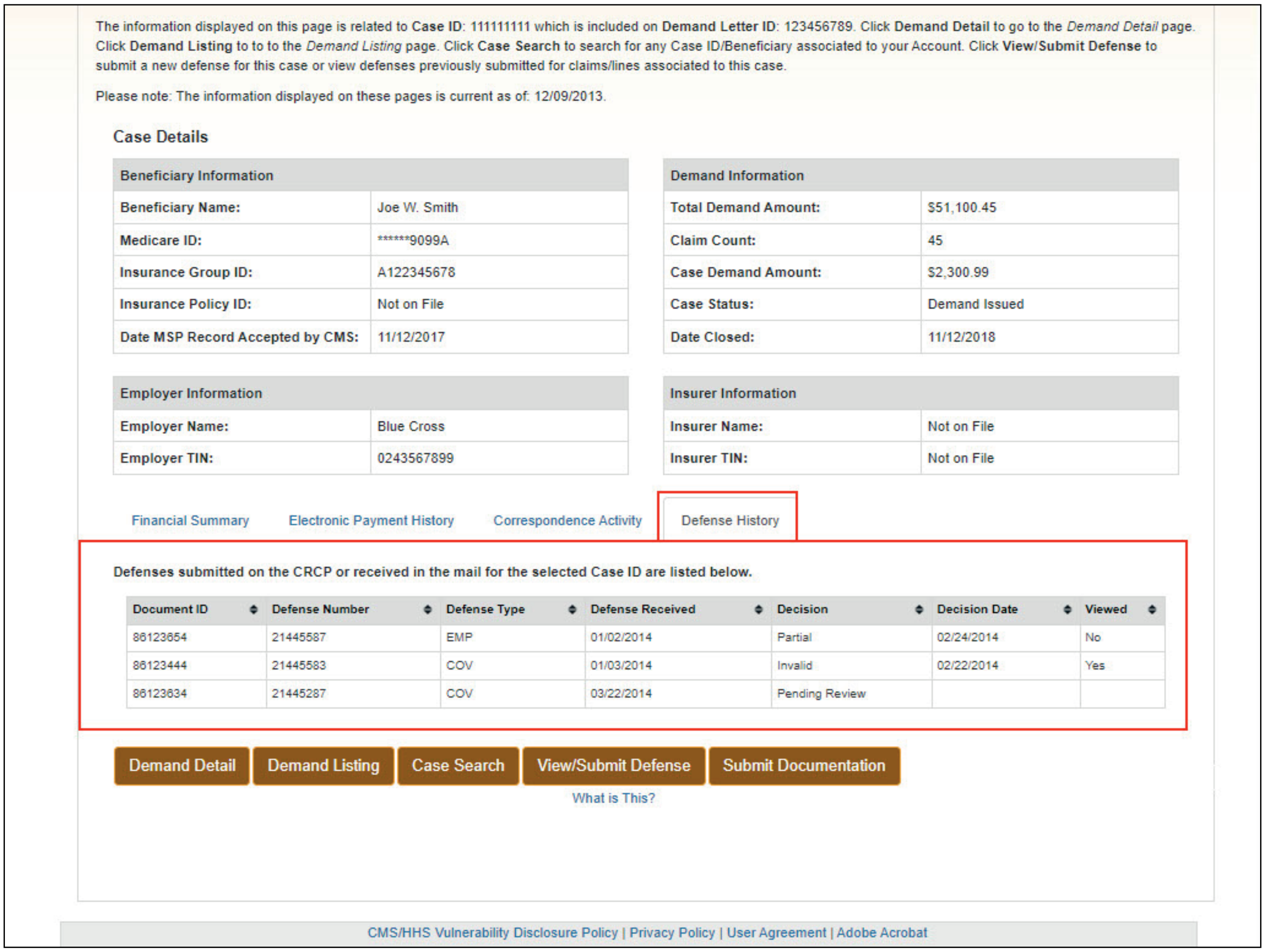
The Correspondence Activity tab shows all incoming and outgoing correspondence related to the Case ID, except correspondence related to a defense.

For correspondence sent to the CRC, you will see the Document ID (in the Correspondence ID column), date received at the CRC, and the letter description.

For correspondence that the CRC has sent, you will see the Letter ID (in the Correspondence ID column), the date sent from the CRC, and the letter description. Click on any column heading to sort the information displayed.

To view correspondence related to a defense, click the Defense History tab.

Slide 16 of 23 - Defense History Tab



Slide notes

The Defense History tab lists information regarding defenses that you have submitted through the CRCP as well as those defenses you have sent to the CRC by mail for the selected Case ID.

For each defense you have submitted, the Document ID, Defense Number, Defense Type, and Defense Received date is shown. The Defense Number is the number assigned by the CRC to your defense correspondence.

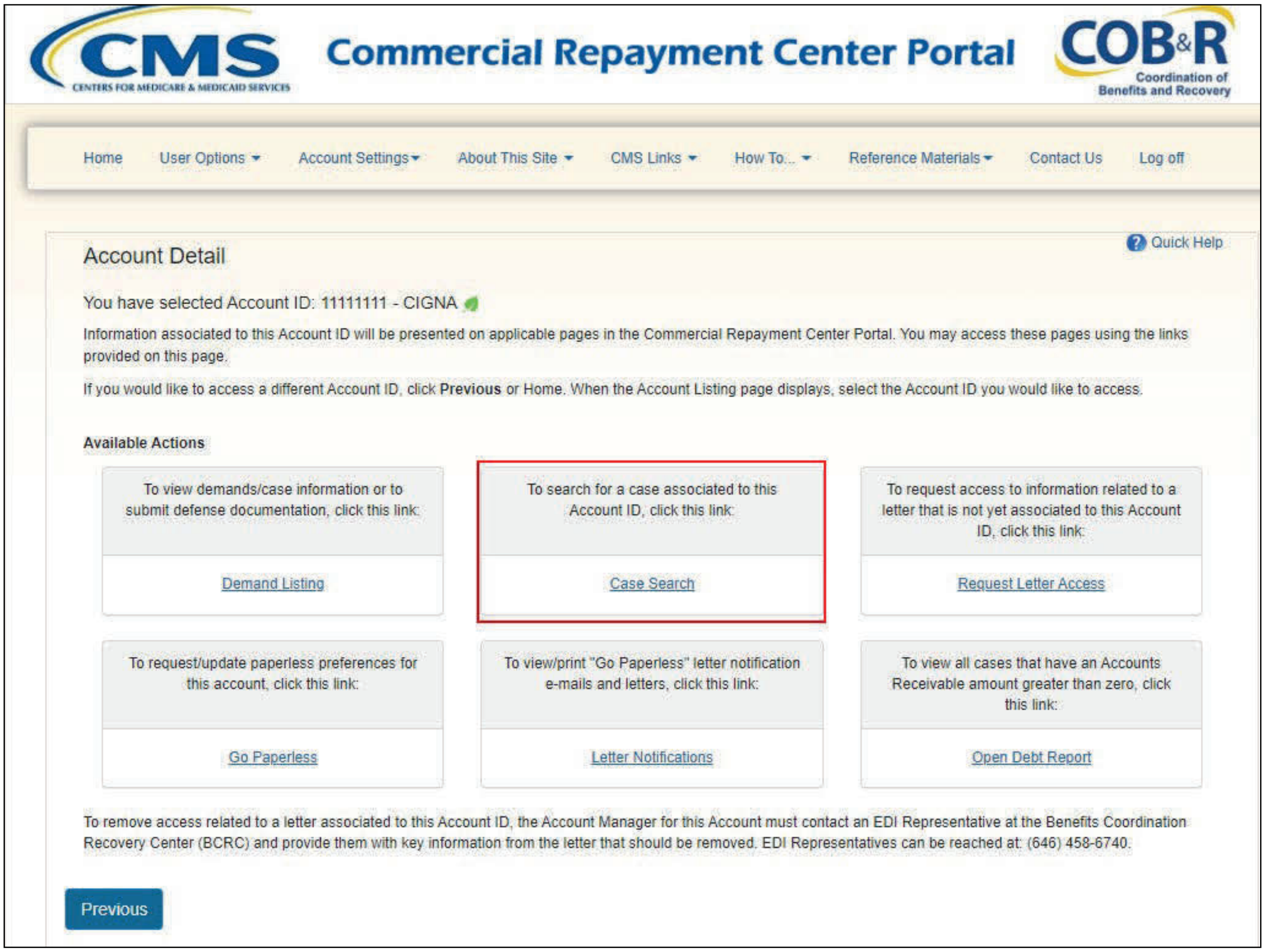
The Defense Received date is the date the CRC received the incoming defense correspondence. If the CRC has responded to your defense, the decision is displayed in the Decision (Outgoing Response) column for the selected case.

The date the CRC made the decision will also be shown.

Until the CRC makes a decision regarding the defense, a value of ‘Pending’ will be displayed in the Decision column and the Decision Date will be blank. You can sort the information by clicking any column heading.

Click the Submitted Documents tab to view files that were submitted on the CRCP.

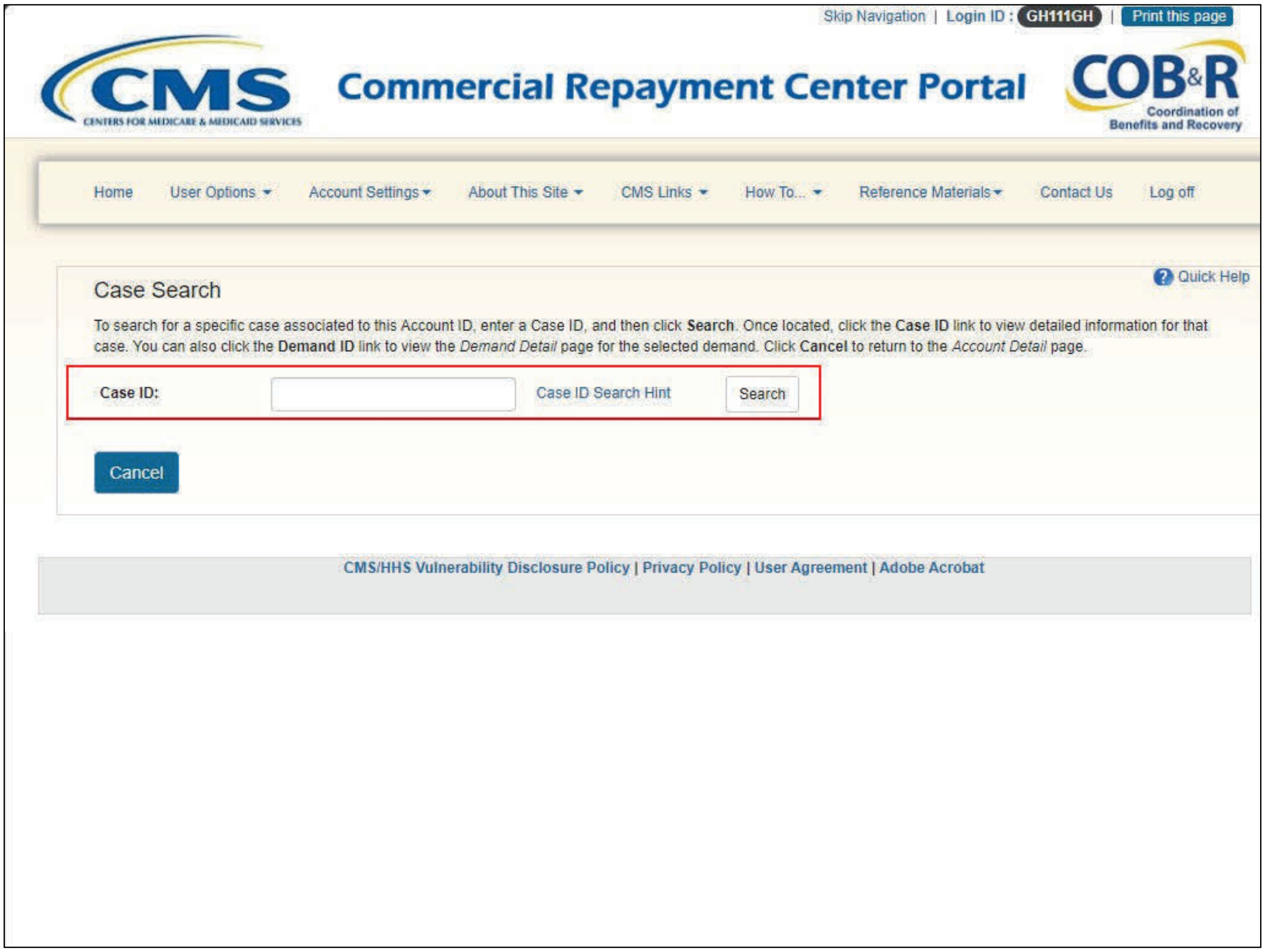
Slide 17 of 23 - Account Detail - Case Search Link



Slide notes

You now also have the option to perform a direct search for a case associated to your account and access the Case Information page. From the Account Detail page, click the Case Search link.

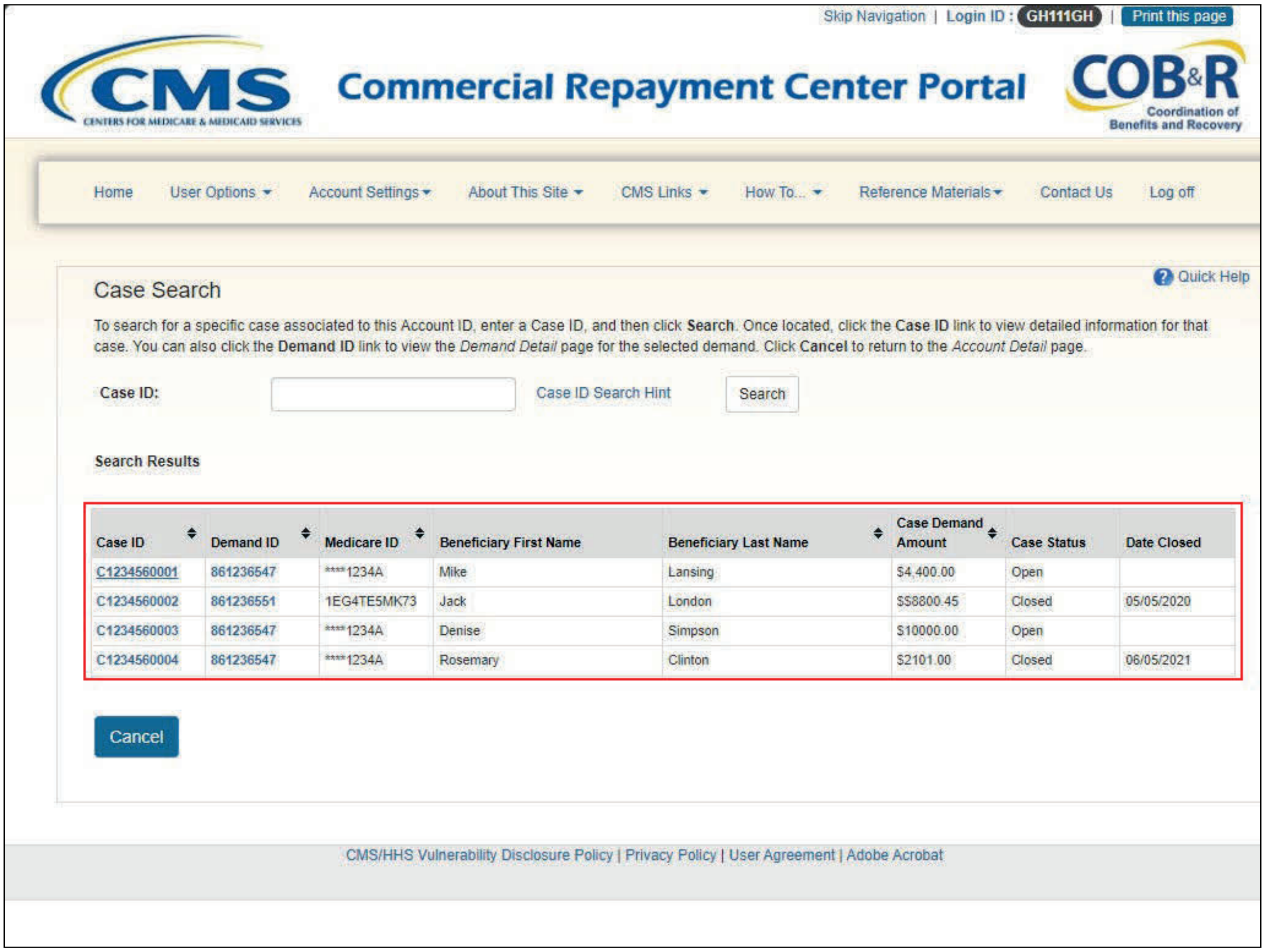
Slide 18 of 23- Case Search Page



Slide notes

From the Case Search page, you can enter a Case ID and click Search.

Slide 19 of 23 - Case Search Results Page



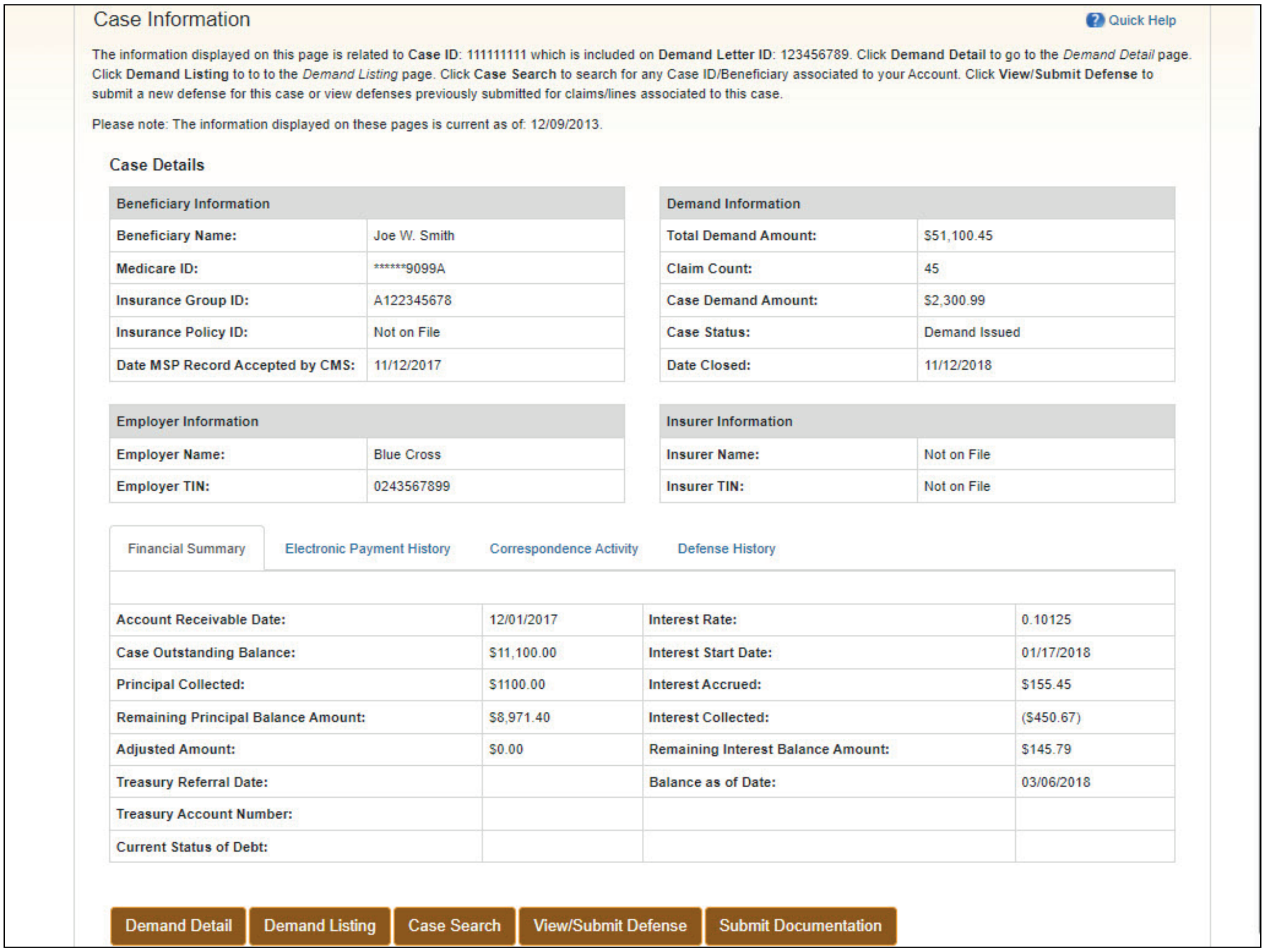
Slide notes

Your search results will display in a table including the following columns:

- Case ID,
- Demand ID,
- Masked Medicare ID,
- Beneficiary First Name,
- Beneficiary Last Name,
- Case Demand Amount,
- Case Status, and
- Date Closed.

Click the Case ID link to access the Case Information page.

Slide 20 of 23 - Case Information Page



Case Information

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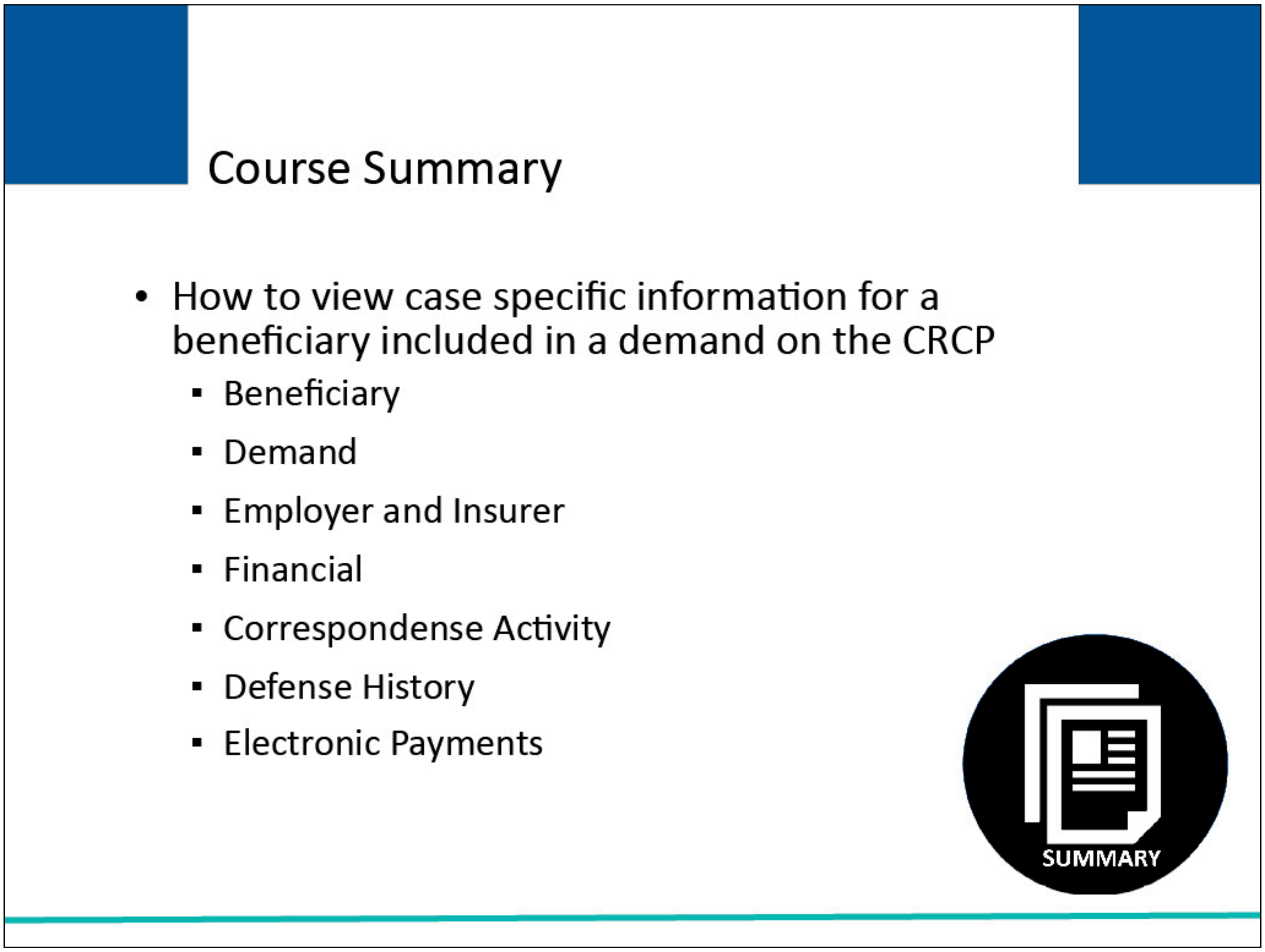
Treasury Referral Date:		**Balance as of Date:**	03/06/2018
Treasury Account Number:			
Current Status of Debt:			

Demand Detail | Demand Listing | Case Search | View/Submit Defense | Submit Documentation

Slide notes

The Case Information page will appear.

Slide 21 of 23 - Course Summary



Slide notes

This course explained how to view case-specific information for a beneficiary included in a demand on the CRCP.

It described how to utilize the Case Information page to see the following case-related information:

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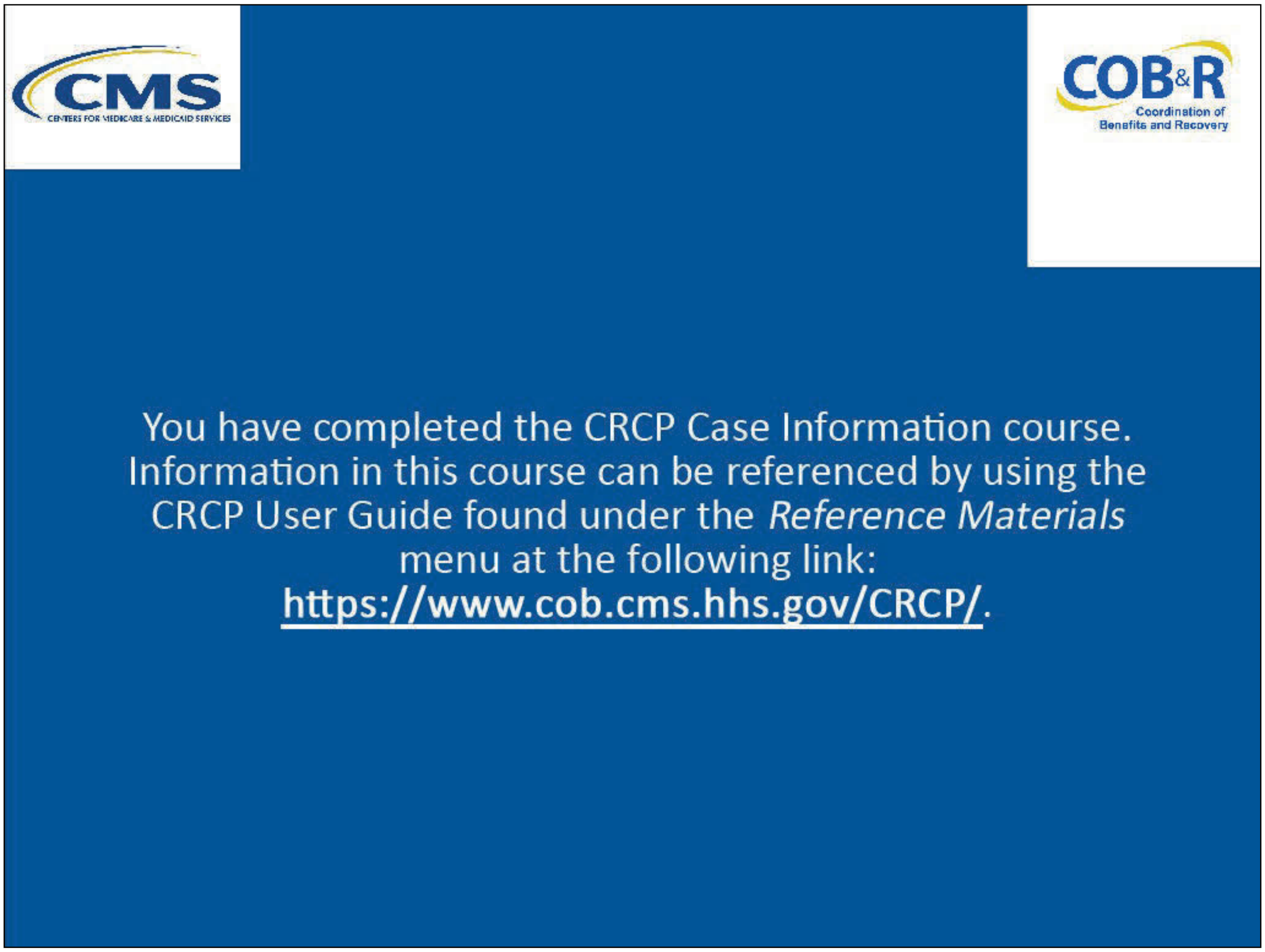
- Employer and Insurer,
- Financial Summary,
- Correspondence Activity,
- Defense History, and
- Electronic Payments.

Slide 22 of 23 - Conclusion



Slide notes

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

Slide 23 of 23 - CRCP Training Survey

Slide notes

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