

## New Registration - PIN Request

### Slide 1 of 23 - New Registration - PIN Request



**CMS**  
CENTERS FOR MEDICARE & MEDICAID SERVICES

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

# Commercial Repayment Center Portal (CRCP)

## New Registration - PIN Request

Version 3.6, 01/08/2024  
Note: CMS reserves the right to modify this presentation. To ensure you have the most current version, verify that the version and date on this page match the version and date on the corresponding page of the PDF currently available on:  
<http://go.cms.gov/cobro>.

### Slide notes

Welcome to the Commercial Repayment Center Portal (CRCP) New Registration - PIN Request 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/>.

**Slide notes**


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

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

**Slide 3 of 23 - Course Overview**

## Course Overview

- **Registration and Account Setup - 2 Steps**
  - **Step 1 - PIN Request**
    - CRCP User Roles
    - Authorized Representative's next steps
  - **Step 2 - Account Setup**
    - See "Account Setup" course



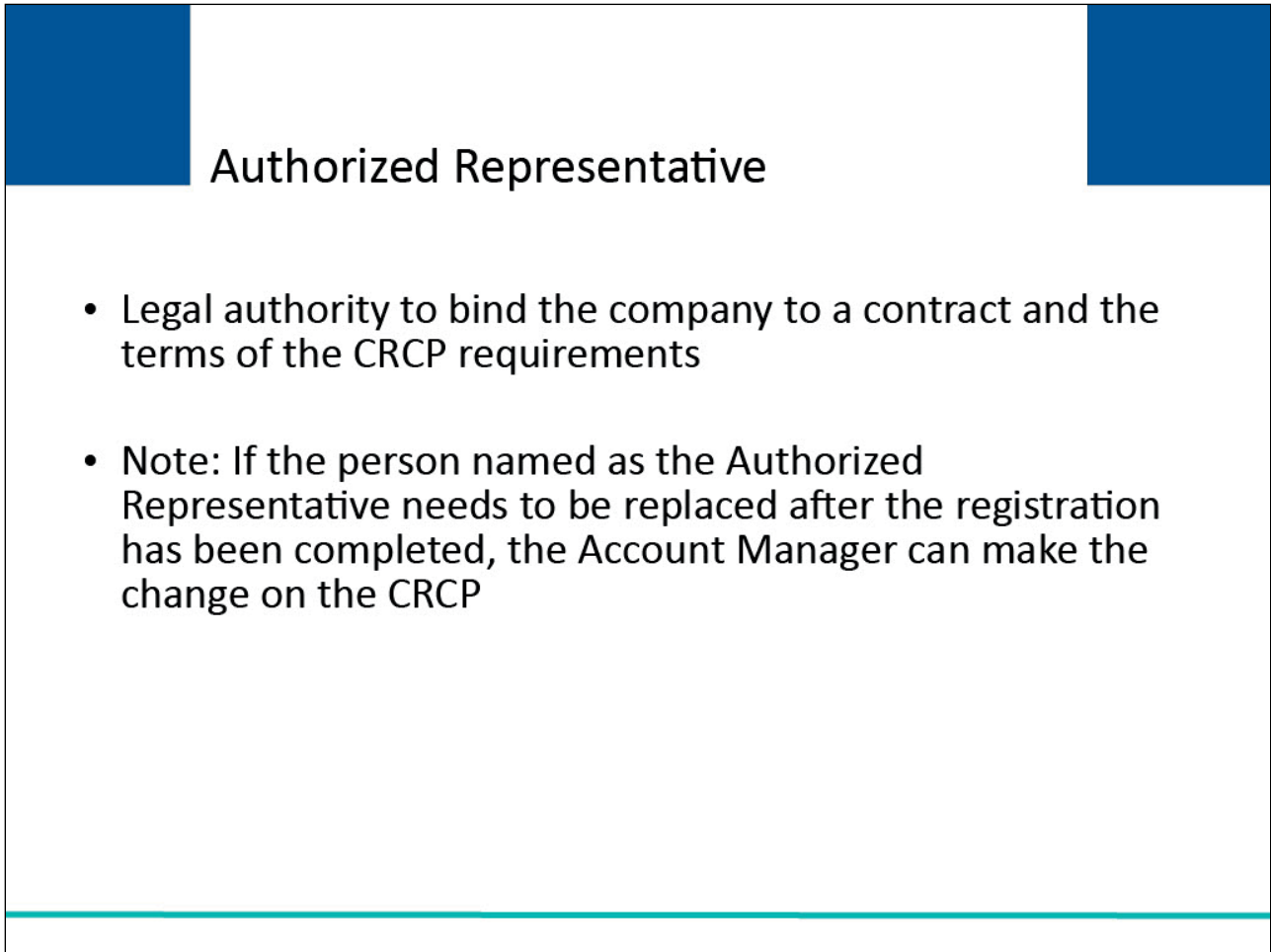
**Slide notes**

The CRCP requires a two-step process to register and setup a new account:

- Step 1: New Registration - PIN Request (performed by the Authorized Representative, or another person on the Authorized Representative's behalf) and
- Step 2: Account Setup (performed by the Account Manager).

This module reviews the New Registration - PIN Request process, including the CRCP User Roles and Authorized Representative's next steps after New Registration - PIN Request completion. See the "Account Setup" course for information on Step 2.

**Slide 4 of 23- Authorized Representative**



## Authorized Representative

- Legal authority to bind the company to a contract and the terms of the CRCP requirements
- Note: If the person named as the Authorized Representative needs to be replaced after the registration has been completed, the Account Manager can make the change on the CRCP

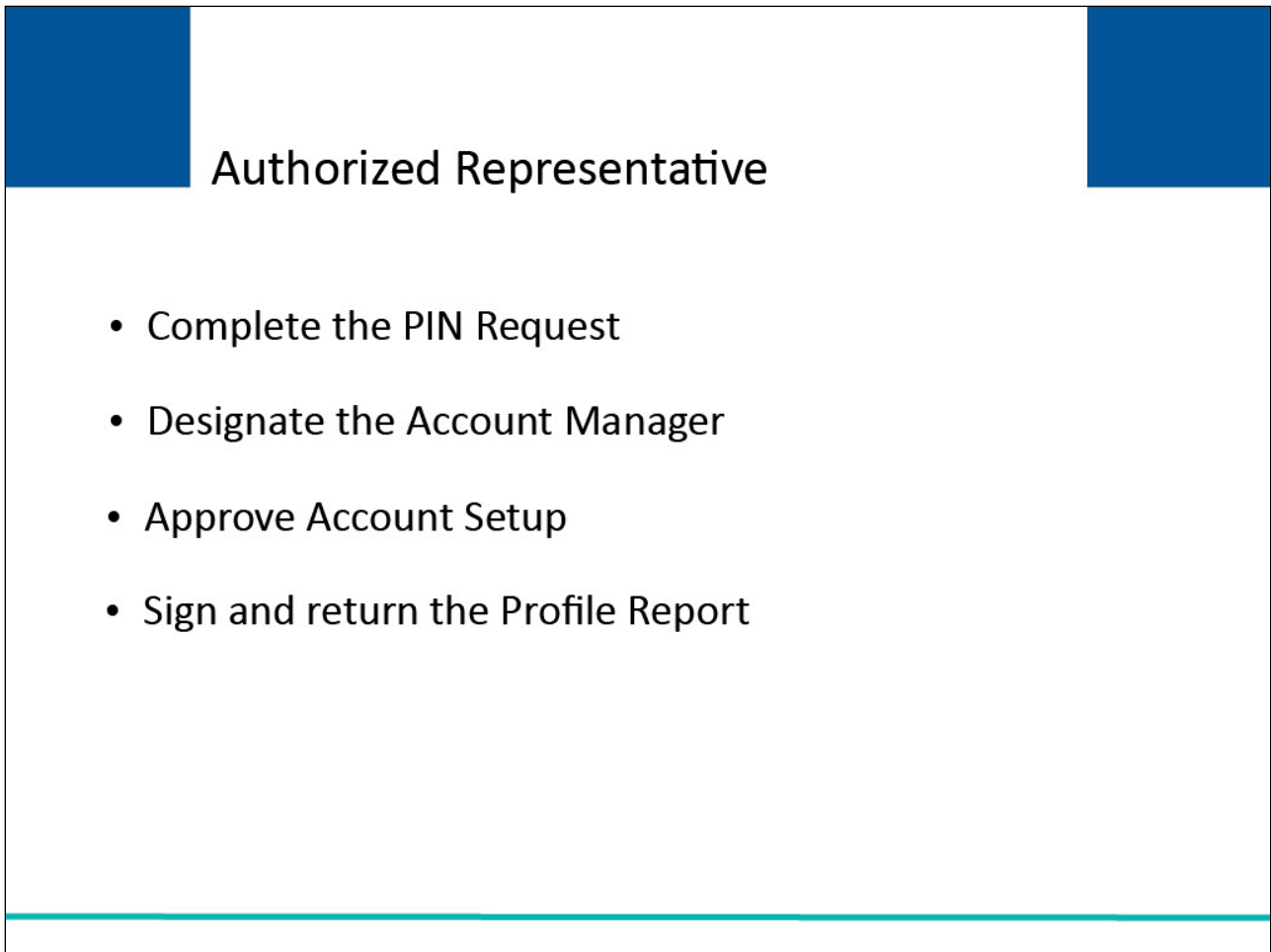
**Slide notes**

To begin, the employer/insurer entity must identify the Authorized Representative.

The Authorized Representative is the individual who has the legal authority to bind the company to the contract and the terms of CRCP requirements and processing.

Note: If the person named as the Authorized Representative needs to be replaced after the New Registration - PIN Request has been completed, the Account Manager can make the change on the CRCP.

**Slide 5 of 23 - Authorized Representative**



## Authorized Representative

- Complete the PIN Request
- Designate the Account Manager
- Approve Account Setup
- Sign and return the Profile Report

**Slide notes**

The Authorized Representative, or someone approved by the Authorized Representative, must complete the New Registration (PIN Request) on the CRCP and provide all of the information requested by the system.

This person is responsible for designating the Account Manager.

Additionally, the Authorized Representative must approve the Account Setup, by physically signing the Profile Report and returning it to the Benefits Coordination & Recovery Center (BCRC) Electronic Data Interchange (EDI) Department. The Profile Report is generated after the Account Setup process is completed.

It includes all information previously recorded during the New Registration - PIN Request, and any additional information provided during the Account Setup.

**Slide 6 of 23 - Authorized Representative**

## Authorized Representative

- Cannot be a CRCP user
  - Cannot be the Account Manager or Account Designee
- Can register as the Authorized Representative for more than one CRCP account

**Slide notes**

The Authorized Representative cannot be an actual user of the CRCP, that is, cannot be the Account Manager or Account Designee. However, he or she can register as the Authorized Representative for more than one CRCP account.

Please note: Only those individuals who are assigned the role of an Account Manager or Account Designee can access and use the CRCP.

**Slide 7 of 24 - Account Manager and Account Designee**

## Account Manager and Account Designee

- Account Manager (only) functions
  - Complete Account Setup
  - Administer the CRCP account
  - Invite other users (Account Designees to assist)
- Account Manager and Account Designee functions
  - Track GHP recovery cases
  - Submit documented defenses

**Slide notes**

The Account Manager is assigned by the Authorized Representative.

This individual is responsible for completing Account Setup, administering the account on the CRCP, and inviting others to assist as Account Designees.

Both the Account Manager and the Account Designee have the ability to track Group Health Plan (GHP) recovery cases and submit documented defenses.

**Slide 8 of 24 - PIN Request on the CRCP**

## PIN Request on the CRCP

- PIN Request requires
  - Account Type selection
  - Company Tax Identification Number (TIN)
  - Authorized Representative contact information
    - Name, Job Title, Address, Phone, and E-mail
  - Letter Information (Defense or Demand)
    - Letter ID
    - Key piece of information from the letter

**Slide notes**

Once the Authorized Representative has been identified, they may complete the New Registration - PIN Request process.

The New Registration - PIN Request will require the selection of the Account Type (Employer and Other Plan Sponsors or Insurers and Claims Processing Third Party Administrators), Company Tax Identification Number or TIN; Authorized Representative contact information, that is, Name, Job Title, Address, Phone, and email; and letter information.

To supply the letter information, the Authorized Representative will need one of the following letters that were received from the Commercial Repayment Center (CRC): Defense or Demand.

The Authorized Representative will need the Letter ID and a key piece of information from that letter.



Slide 9 of 24 - Login Warning Page

Slide notes

The Authorized Representative, or another person on the Authorized Representative’s behalf, will begin the PIN Request process by going to the CRCP URL at: [CMS CRCP Website](#).

Each time a user visits the CRCP website, the Login Warning page appears. This page provides information about CRCP security measures including access, penalties, and privacy laws.

Scroll to the bottom of this page to review the entire statement. All users must agree to the terms of this warning each time they access the CRCP. Click the I Accept link at the bottom of the page to continue.

Slide 10 of 24 - Welcome to the CRCP

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

### Welcome to the CRCP

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

For information about the availability of auxiliary aids and services, please visit:  
<http://www.medicare.gov/about-us/nondiscrimination/nondiscrimination-notice.html>

#### CRCP Messages

7/3/2023 Important Note: An updated CRCP User Guide is now available at the Reference Material link above. Updates in this version include the ability for CRCP users to now submit correspondence on the CRCP for any case that has not been referred to Treasury. A Submit Documentation button has been added to the Case Information page, along with subsequent pages used to upload and submit documents. Please refer to Chapter 1 for a full summary of updates.

#### Getting Started

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

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

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

For more information on the registration process and CRCP user roles, please refer to the *How to Get Started* help document, located under the *How To* menu on the Navigation bar. To begin the registration process, your CRCP Authorized Representative will click the **New Registration (PIN Request)** button.

**Step 1** **Step 2**

**New Registration (PIN Request)** **Account Setup**

(Letter ID and TIN required) (Account ID and PIN required)

Sign in to your account:  
Login ID:   
Forgot Login ID  
Password:   
Forgot Password  
**Login** Clear

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

Slide notes

The Welcome to the CRCP page will appear. Click the New Registration - PIN Request button to initiate this process.

Slide 11 of 24 - Personal Identification Number Request Page

Personal Identification Number (PIN) Request [Quick Help](#)

The information requested on this page will be used to verify that the registrant has the correct credentials to register the entity for a Commercial Repayment Center Portal (CRCP) account. In order to complete the PIN Request, you will need one of the following letters from the Commercial Repayment Center: Defense or Demand.

At the successful completion of the PIN Request, you will be provided with an Account ID and emailed a PIN which will be used by your Account Manager to complete the final part of the registration process and set up the account. When you have completed your entry, click Continue to proceed. Click Cancel to cancel the PIN Request process.

An asterisk (\*) indicates a required field.

**Company Information**

\* Select the type of Account for which you are registering:

\* Company Tax Identification Number (TIN):

**Letter Information**

Enter and re-enter the Letter ID for the letter you are using to request a PIN: [Entry Hint](#)

\* Letter ID:

\* Re-enter Letter ID:

\* Select the type of letter you are using to request the PIN and provide the required key piece of information for that letter type: [Entry Hint](#)

Defense Letter - Enter the Case ID:

Demand Letter - Enter the Total Debt Due printed on the letter:  .

Slide notes

The Personal Identification Number (PIN) Request page will appear.

The information entered on this page will be used to verify that you have the appropriate credentials to create a CRCP account. All fields denoted with an asterisk are required.

Click the drop-down arrow to select the type of account you are registering for: employer (applies to employers and other plan sponsors) or insurer (applies to insurers and claims processing Third Party Administrators or TPAs). Enter the 9-digit Company TIN.

A masked TIN is found in the upper left corner of the Defense or Demand letter in the “Regarding” section of the letter.

Note: The CRCP will not allow the Authorized Representative to complete the PIN Request with a blank TIN. The TIN supplied is used to authenticate the registrant prior to establishing the CRCP account.

Enter and re-enter the Letter ID for the letter you are using to request the PIN. The Letter ID is a number that begins with ‘86’.

This number can be found in the upper left corner of the Defense or Demand letter in the “Regarding” section of the letter.

You must enter all numbers when you are keying the Letter ID on this page. Spaces and special characters are not allowed.

Slide 12 of 24 - Personal Identification Number Request Page

Personal Identification Number (PIN) Request [Quick Help](#)

The information requested on this page will be used to verify that the registrant has the correct credentials to register the entity for a Commercial Repayment Center Portal (CRCP) account. In order to complete the PIN Request, you will need one of the following letters from the Commercial Repayment Center: Defense or Demand.

At the successful completion of the PIN Request, you will be provided with an Account ID and emailed a PIN which will be used by your Account Manager to complete the final part of the registration process and set up the account. When you have completed your entry, click Continue to proceed. Click Cancel to cancel the PIN Request process.

An asterisk (\*) indicates a required field.

**Company Information**

\* Select the type of Account for which you are registering: Please Select

\* Company Tax Identification Number (TIN):

**Letter Information**

Enter and re-enter the Letter ID for the letter you are using to request a PIN: [Entry Hint](#)

\* Letter ID:

\* Re-enter Letter ID:

\* Select the type of letter you are using to request the PIN and provide the required key piece of information for that letter type: [Entry Hint](#)

Defense Letter - Enter the Case ID:

Demand Letter - Enter the Total Debt Due printed on the letter:

Cancel Continue

Slide notes

Next, select the radio button for the type of letter (Defense or Demand) you are using to request a PIN.

Finally, include the required key piece of information for that letter type. You can locate this information at the top of each letter in the “Regarding” section.

If you are using a Defense Letter, enter the Case ID. If the Case ID begins with a ‘C’, include these characters when you enter the Case ID.

For a Demand Letter, enter the Total Debt Due printed on the letter. Enter the dollar amount in the Dollars field and the two-digit cents amount in the Cents field. Do not enter the dollar symbol or the decimal.

After all required information has been entered, click Continue.

Note: If at any point during the New Registration - PIN Request process you wish to stop, click Cancel.

Once clicked, a Cancel Confirmation page displays where you will be given the opportunity to continue with the cancel request or return and complete the New Registration - PIN Request process.

**Slide 13 of 23- Validation**

## Validation

- System validates each field
  - If errors are found, the system displays a message indicating what error(s) were found
    - You must correct the error before proceeding
  - System revalidates the data once it has been entered

**Slide notes**

The system will validate each field on each New Registration - PIN Request page for accuracy and completeness.

If errors are found, the system displays applicable error messages on the screen indicating what error condition or conditions were found.

When errors are discovered, you must correct the error before the system will allow you to proceed. Once the data has been corrected, the system will revalidate all data that has been entered.

Slide 14 of 23- Contact Us

The screenshot shows the 'Contact Us' page of the Commercial Repayment Center Portal. At the top left is the CMS logo (Centers for Medicare & Medicaid Services). At the top center is the text 'Commercial Repayment Center Portal'. At the top right is the COB&R logo (Coordination of Benefits and Recovery). Below the logos are two buttons: 'Print this page' and 'Close'. The main content area is titled 'Contact Us' and contains two sections:

- Contact the Benefits Coordination & Recovery Center (BCRC)**  
If you have a problem with Account Setup, Login or Password issues or other technical problems using the CRCP, please contact an EDI Representative at the 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.
- Contact the Commercial Repayment Center (CRC)**  
If you need assistance regarding a Documented Defense or specific information related to a Group Health Plan recovery case, 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 (TTY/TDD: 1-855-797-2627 for the hearing and speech impaired).

Slide notes

If the Letter ID, key data element and/or TIN entered on the PIN Request page cannot be matched to a record in the CRCP, the Contact the Commercial Repayment Center (CRC) page displays.

Contact a CRC Customer Service Representative at 1-855-798-2627 for assistance. After you have resolved the issue, you may attempt the New Registration - PIN Request process again.

Slide 15 of 23 - Authorized Representative Information Page

The screenshot shows the 'Authorized Representative (AR) Information' page. At the top, there are logos for CMS (Centers for Medicare & Medicaid Services) and COB&R (Coordination of Benefits and Recovery). Navigation links include 'Skip Navigation', 'Login ID', and 'Print this page'. A menu bar contains 'About This Site', 'CMS Links', 'How To...', 'Reference Materials', and 'Contact Us'. The main content area has a title 'Authorized Representative (AR) Information' and a 'Quick Help' link. Below the title, there are three paragraphs of instructions: 1. 'The person named on this page should be the individual in the organization who has the legal authority to bind the organization to a contract and the terms of CRCP requirements. This individual will not be able to access the CRCP application and cannot be a user of this system.' 2. 'The AR must approve the organization's profile during the initial account setup and through any subsequent changes. Please refer to the Data Use Agreement in the CRCP User Guide to make sure the person named as the entity's AR has the authority to sign this agreement.' 3. 'When you have completed your entry, click Continue to proceed. Click Cancel to cancel the PIN Request process. If you click Cancel, all data will be lost.' Below these instructions, a note states 'An asterisk (\*) indicates a required field.' The form contains several fields: '\*AR First Name:', 'MI:', '\*Last Name:', '\*AR Title:', '\*AR E-Mail Address:', '\*Re-enter AR E-Mail Address:', '\*AR Phone:', and 'Fax:'. Each field has a red asterisk icon indicating it is required. At the bottom of the form are 'Cancel' and 'Continue' buttons. The footer contains links for 'CMS/HHS Vulnerability Disclosure Policy', 'Privacy Policy', 'User Agreement', and 'Adobe Acrobat'.

Slide notes

After successfully completing the PIN Request page, the Authorized Representative (AR) Information page will appear. Information related to the Authorized Representative must be entered on this page.

It is critical that you enter the correct contact information for the Authorized Representative, including his/her correct email address.

If you enter the email address of the Account Manager or Account Designee instead of the email address of the Authorized Representative, those individuals will be unable to register as users of the CRCP.

Note: The Authorized Representative can only have that one role in the CRCP. This person cannot be an Account Manager or an Account Designee.

The CRCP will verify that the submitted email address for the Authorized Representative does not match an email address for any CRCP Account Manager or Account Designee, otherwise an error will display.

After entering the Authorized Representative information, click Continue to proceed.



Slide 16 of 24 - PIN Request Summary Page

Navigation: [About This Site](#) | [CMS Links](#) | [How To...](#) | [Reference Materials](#) | [Contact Us](#)

### PIN Request Summary Quick Help

Please verify that the information displayed on this page is correct. If any changes are necessary, click the Edit button next to the section that requires modifications. If you are satisfied with the information, click Continue. Click Cancel to cancel the PIN Request process. If you click Cancel, all data will be lost. You may print this page for your records.

Personal Identification Number (PIN) Request Information		Edit
Account Type:	Insurer - Insurers and Claims Processing Third Party Administrators (TPAs)	
Company Tax Identification Number (TIN):	123456789	
Letter ID:	862233445566	
Letter Type:	Demand Letter	
Letter Key:	03/17/2014	

Authorized Representative (AR) Information		Edit
AR Name:	FirstName M LastName	
AR Title:	Auth Rep.	
E-mail Address:	pinrequestemail@emaildomain.com	
Phone:	(123) 111 - 1234 Ext: 34567	
Fax:	(111) 111 - 1111	

Company Information	
Company Name:	ACME Insurance

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

Slide notes

The PIN Request Summary page displays. You can print this page by clicking the Print this page link.

This page lists all of the information that was previously entered. Review and verify all information before continuing.

To make any corrections, click the Edit button next to the applicable section. The system will display that entry information page.

For example, to change information entered on the Personal Identification Number, or PIN Request page, click the Edit button displayed next to that page heading. When the Personal Identification Number (PIN) Request page displays, add, change, or delete any information. Once all corrections have been made, click Continue until you have navigated back to the PIN Request Summary page.

Slide 17 of 23 - PIN Request Summary Page

Navigation: [About This Site](#) | [CMS Links](#) | [How To...](#) | [Reference Materials](#) | [Contact Us](#)

### PIN Request Summary Quick Help

Please verify that the information displayed on this page is correct. If any changes are necessary, click the Edit button next to the section that requires modifications.  
If you are satisfied with the information, click Continue. Click Cancel to cancel the PIN Request process. If you click Cancel, all data will be lost. You may print this page for your records.

Personal Identification Number (PIN) Request Information		Edit
Account Type:	Insurer - Insurers and Claims Processing Third Party Administrators (TPAs)	
Company Tax Identification Number (TIN):	123456789	
Letter ID:	862233445566	
Letter Type:	Demand Letter	
Letter Key:	03/17/2014	

Authorized Representative (AR) Information		Edit
AR Name:	FirstName M LastName	
AR Title:	Auth Rep.	
E-mail Address:	pinrequestemail@emaildomain.com	
Phone:	(123) 111 - 1234 Ext: 34567	
Fax:	(111) 111 - 1111	

Company Information	
Company Name:	ACME Insurance

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

Slide notes

When the PIN Request Summary information has been verified, click Continue to submit the PIN Request.

Slide 18 of 23- PIN Request Completed Successfully Page

The screenshot shows the 'Commercial Repayment Center Portal' website. At the top left is the CMS logo (Centers for Medicare & Medicaid Services). At the top right is the COB&R logo (Coordination of Benefits and Recovery). Below the logos is a navigation bar with links: 'About This Site', 'CMS Links', 'How To...', 'Reference Materials', and 'Contact Us'. The main content area has a heading 'CRCP PIN Request Completed Successfully. Thank You.' and a 'Quick Help' link. A red-bordered box highlights the text: 'You have successfully completed the PIN Request for the Commercial Repayment Center Portal. Your assigned Account ID is: 123456. It is important to print this page for your records.' Below this are sections for 'Next Steps', 'Account Setup', and a 'Commercial Repayment Center Portal' link. At the bottom of the page is a footer with links for 'CMS/HHS Vulnerability Disclosure Policy', 'Privacy Policy', 'User Agreement', and 'Adobe Acrobat'.

Slide notes

The PIN Request Completed Successfully Thank You page appears confirming that the PIN Request has been successfully submitted.

The assigned Account ID is displayed on the PIN Request Completed Successfully Thank You page. It is important that you print this page for your records and to use when completing the Account Setup portion of creating your account.

Click the Commercial Repayment Center Portal link to return to the Welcome to the CRCP page.

**Slide 19 of 23 - Next Steps**

## Next Steps

- CRCP validates PIN Request information
- CRC mails letter to Authorized Representative within 12 business days
  - Includes the Account ID and PIN
  - Sent to the business mailing address on letter used to submit PIN Request
- Contact the CRC if letter is not received within 12 business days
  - CRC Phone: 1-855-798-2627

**Slide notes**

The information submitted in the New Registration - PIN Request step will be vetted by the CRCP to ensure it is valid and complete. Within 7 business days, the CRC will email the Authorized Representative.

This email will include the PIN and instructions for Account Setup. It will be sent to the email address on the letter that was used to submit the PIN Request.

If this email is not received within 7 business days, contact an EDI Representative at 1-646-458-6740 or by email at: [COBVA@ehmedicare.com](mailto:COBVA@ehmedicare.com).

Note: The email will only include the PIN, the Account ID will need to be recorded from the "CRCP PIN Request Completed Successfully. Thank you." Page. Both are required when completing Account Setup.

**Slide 20 of 23 - Next Steps**

## Next Steps

- Authorized Representative
  - Must give the Account ID and PIN to the Account Manager
- Account Manager
  - Must complete the Account Setup on the CRCP
    - Account ID and PIN are needed to begin
    - Please see the “Account Setup” CBT for more information

**Slide notes**


The Authorized Representative must give the Account ID and PIN to the Account Manager for the account to use to complete the Account Setup. The Account Manager must return to the CRCP to complete the Account Setup.

The Account Manager will need to enter the Account ID and PIN to begin account setup. For more information on the Account Setup process, please see the “Account Setup” CBT.

Slide 21 of 23- Course Summary

## Course Summary

- Registration and Account Setup - 2 Steps
  - Step 1 - PIN Request
    - CRCP User Roles
    - Authorized Representative's next steps
  - Step 2 - Account Setup
    - See "Account Setup" course





Slide notes

You are now able to discuss the two-step process to register and setup a new account in the CRCP:

- Step 1: New Registration - PIN Request (performed by the Authorized Representative, or another person on the Authorized Representative's behalf) and Step 2: Account Setup (performed by the Account Manager).
- This module reviewed the New Registration - PIN Request process, including the CRCP User Roles and Authorized Representative's next steps after New Registration - PIN Request completion. See the "Account Setup" course for information on Step 2.

**Slide 22 of 23 -CRCP New Registration – PIN Request Conclusion**

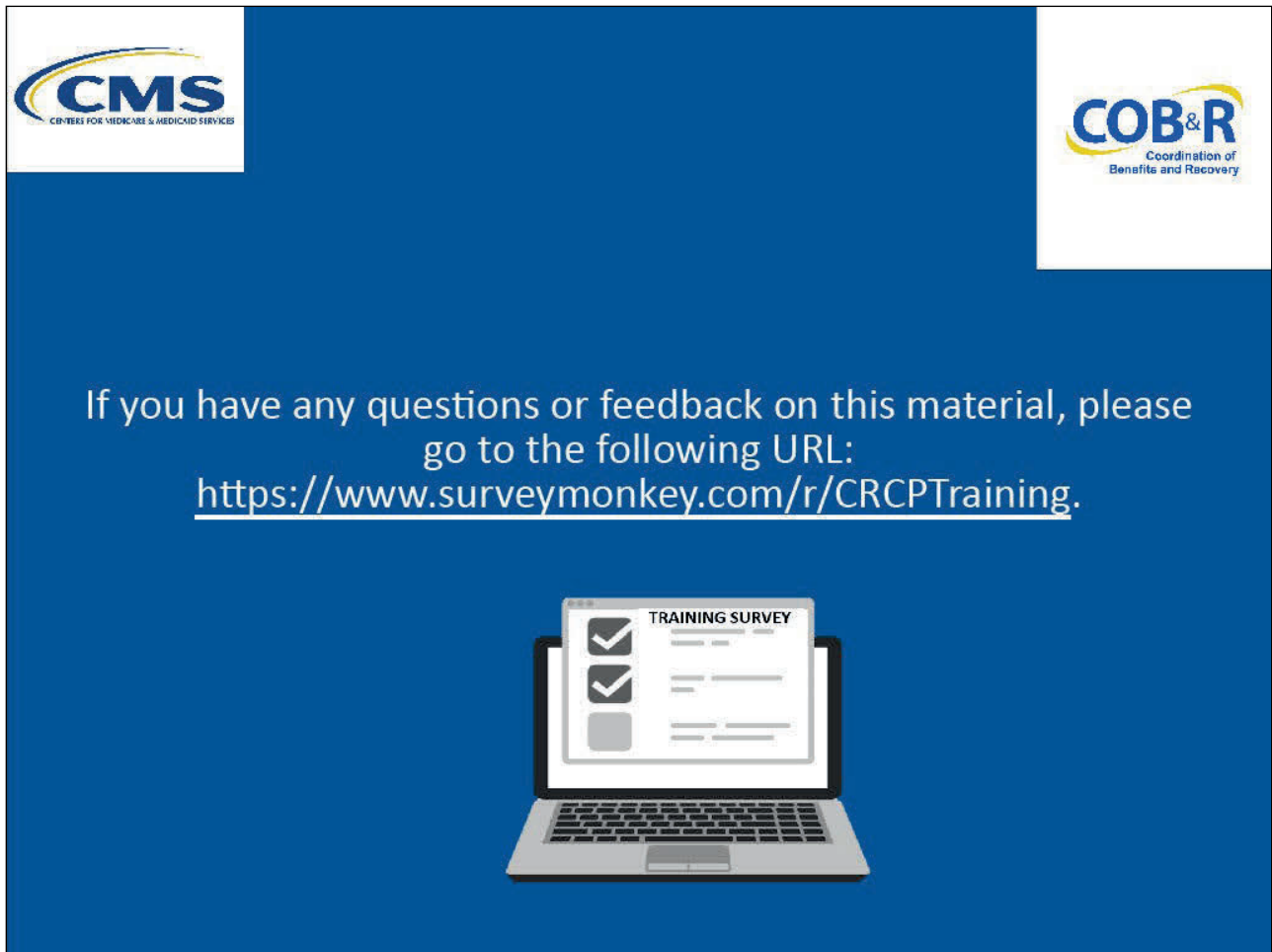


You have completed the CRCP New Registration - PIN Request course. Information in this course can be referenced by using the CRCP User Guide found under the *Reference Materials* menu at the following link:  
<https://www.cob.cms.hhs.gov/CRCP/>.

**Slide notes**

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

Slide 23 of 23 - CRCP Training Survey



The slide features a blue background. In the top left corner is the CMS logo (Centers for Medicare & Medicaid Services). In the top right corner is the COB&R logo (Coordination of Benefits and Recovery). The central text reads: "If you have any questions or feedback on this material, please go to the following URL: <https://www.surveymonkey.com/r/CRCPTraining>." Below the text is an illustration of a laptop displaying a "TRAINING SURVEY" form with two checked boxes.

**Slide notes**

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