Go Paperless
Quick Start Guide

For the Section 111 Mandatory Reporting and Medicare Secondary Payer Recovery Portal (MSPRP) Applications

Version 1.0

August 24, 2021

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REVISION HISTORY

Version	Date	Organization/Point of Contact	Description of Changes
1.0	08/24/2021	Ashley Bryant	Baseline

1.0 Introduction

1.1 Purpose

The purpose of the *Go Paperless Quick Start Guide* is to provide “early adopters,” with step-by-step instructions for setting up and using the new Go Paperless feature. Go Paperless allows users to choose whether they want to receive letter notifications electronically and view letters online (i.e., paperless), or to continue to receive letters by mail. Full implementation of this feature is planned for January 2022.

As an early adopter, you will set up your Go Paperless options by submitting your selections using the NGHP TIN Reference File (Section 2.1). Once submitted, you will begin receiving letter notification emails for your Non-Group Health Plan (NGHP) correspondence instead of mailed letters. You can then log in to the Medicare Secondary Payer Recovery Portal (MSPRP) to view your confirmation emails and letters online, as well as to print and download letters (if logged in using multi-factor authentication (MFA)), and to update the Go Paperless Email Distribution List (Section 2.2).

Important Note: If you want to continue to opt in to Go Paperless after this feature is fully implemented, submit future input files by entering spaces in the Go Paperless fields to keep your current selections (Table 1). Otherwise, select other options on your input file to change your preferences.

1.2 Go Paperless

Go Paperless allows you to choose whether you want to receive letters electronically (i.e., paperless) or by mail. Section 111 submitters can choose to opt in or opt out of Go Paperless using the NGHP TIN Reference File (Section 2.1). MSPRP users can then receive, view, and print letter notification emails and letters. MSPRP users may also add an email address to the distribution list for receiving Go Paperless notification emails. Go Paperless is only available for accounts that are associated with an insurer or recovery agent that has opted in to Go Paperless.

2.0 Getting Started: Section 111 and MSPRP

2.1 Setting Up Go Paperless via the NGHP TIN Reference File

To begin, you will need to submit a NGHP TIN Reference File, configuring the file to add the following three new Go Paperless fields (currently filler reserved for future use) and then designate your selections to opt in to Go Paperless: TIN/Office Code Paperless Indicator (Field 23), Recovery Agent Paperless Indicator (Field 24), and Recovery Agent TIN (Field 25). See Table 1 for field formats.

On the NGHP TIN Reference Response File, you will see five new fields (Fields 48-52) returned (Table 2).

Note: These new fields will be added to the S111 system, and to NGHP user guide, when Go Paperless is fully implemented.

Table 1: NGHP TIN Reference File Detail Record – 2220 bytes

Field	Name	Size	Start Pos.	End Pos.	Data Type	Description
23	TIN/Office Code Paperless Indicator	1	582	582	Alphabetic	Indicates the paperless selection for the TIN/Office Code combination. Valid values: Y = the TIN/Office Code address is opting in to "Go Paperless" and will receive letter notification emails instead of mailed hard copies of NGHP recovery letters N = the TIN/Office Code address is opting out of "Go Paperless" and will receive hard copies of NGHP recovery letters Space = no change to the currently saved paperless selection for the address. (If the currently saved value is space or 'N', the address will continue to receive mailed letters. If the currently saved value is 'Y', then the address will remain paperless.) **Optional.**

Field	Name	Size	Start Pos.	End Pos.	Data Type	Description
24	Recovery Agent Paperless Indicator	1	583	583	Alphabetic	Indicates the paperless selection for the Recovery Agent Address associated to the TIN/Office Code. Valid values: Y = the recovery agent address is opting in to "Go Paperless" and will receive letter notification emails instead of mailed hard copies of NGHP recovery letters N = the recovery agent address is opting out of "Go Paperless" and will receive hard copies of NGHP recovery letters Space = no change to the currently saved paperless selection for the address. (If the currently saved value is space or 'N', the address will continue to receive mailed letters. If the currently saved value is 'Y', then the address will remain paperless.) **Optional.**
25	Recovery Agent TIN	9	584	592	Numeric	Recovery Agent's Federal Tax Identification Number. **Required if Recovery Agent Paperless Indicator (Field 24) = 'Y'.**
26	Reserved for Future Use	1628	593	2220	Alpha-Numeric	Fill with spaces.

Table 2: NGHP TIN Reference Response File Detail Record – 1000 bytes

Field	Name	Size	Start Pos.	End Pos.	Data Type	Description
48	Submitted TIN/Office Code Paperless Indicator	1	908	908	Alphabetic	TIN/Office Code Paperless Indicator as provided on input record.
49	Applied TIN/Office Code Paperless Indicator	1	909	909	Alphabetic	TIN/Office Code Paperless Indicator after validation is completed.

Field	Name	Size	Start Pos.	End Pos.	Data Type	Description
50	Submitted Recovery Agent Paperless Indicator	1	910	910	Alphabetic	Recovery Agent Paperless Indicator as provided on input record.
51	Submitted Recovery Agent TIN	9	911	919	Numeric	Recovery Agent TIN as provided on the input record.
52	Applied Recovery Agent Paperless Indicator	1	920	920	Alphabetic	Recovery Agent Paperless Indicator after validation is complete.
53	Reserved for Future Use	80	921	1000	Alphanumeric	Filled with spaces.

2.2 Viewing and Updating Go Paperless Settings via the MSPRP

2.2.1 Viewing Go Paperless Accounts and Cases

Once you have designated your Go Paperless options using a NGHP TIN Reference File, a green leaf icon is added to the following MSPRP pages, which will allow you and other users to see which accounts and cases have opted in to Go Paperless: *Account List*, *Welcome!*, *Case Listing*, *Case Information*, and *Open Debt Report*. This icon appears next to the account name, account ID, or case ID, depending on the page being accessed.

Note: This icon appears for the account if at least one address associated to an MSPRP account is currently opted in to Go Paperless. The icon appears for a case when the MSPRP account is currently receiving letter notification emails instead of mailed letters for the case.

Figure 2-1: Go Paperless Green Leaf Icon

Figure 2-2: Account List

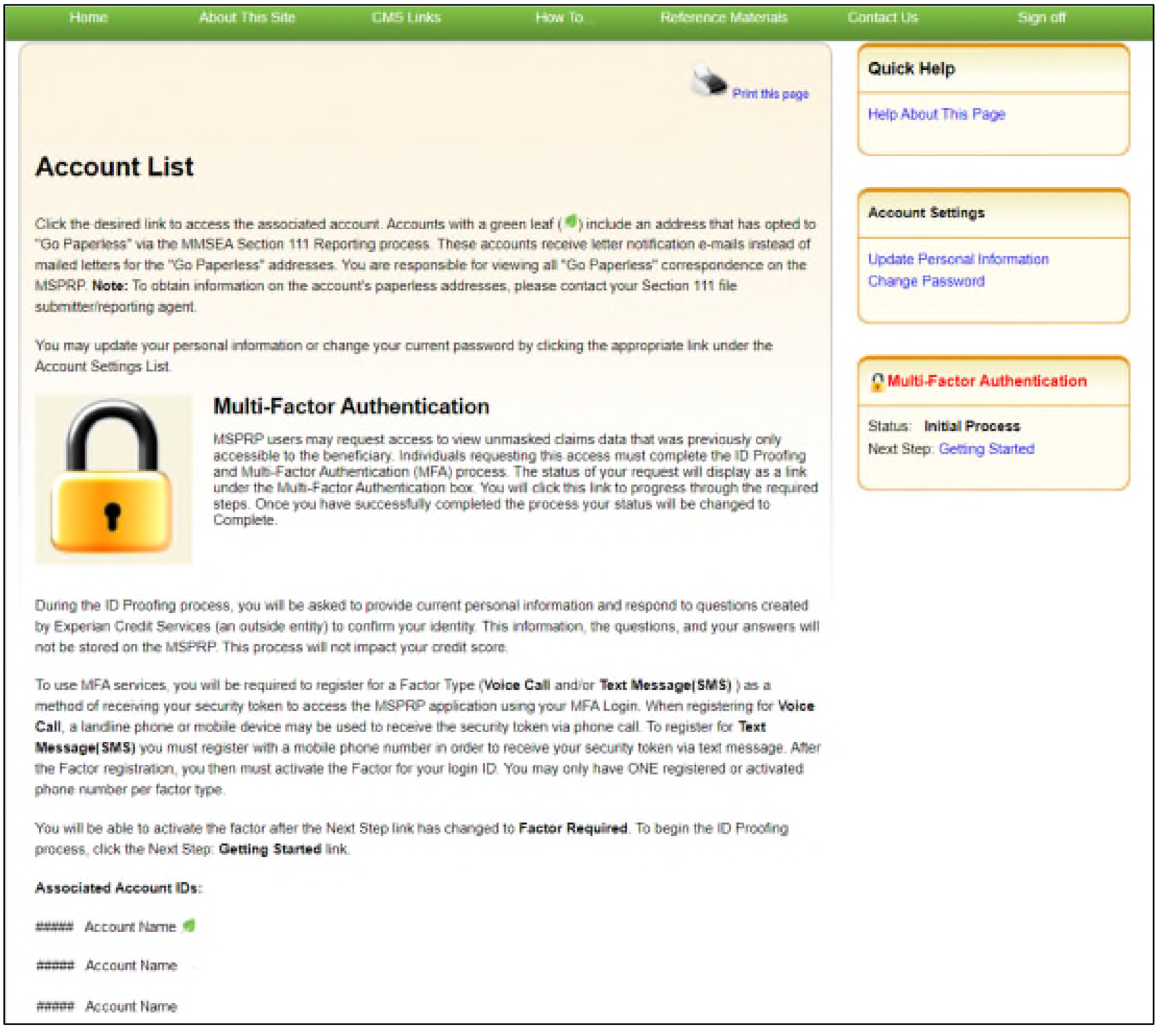


Figure 2-3: Welcome!

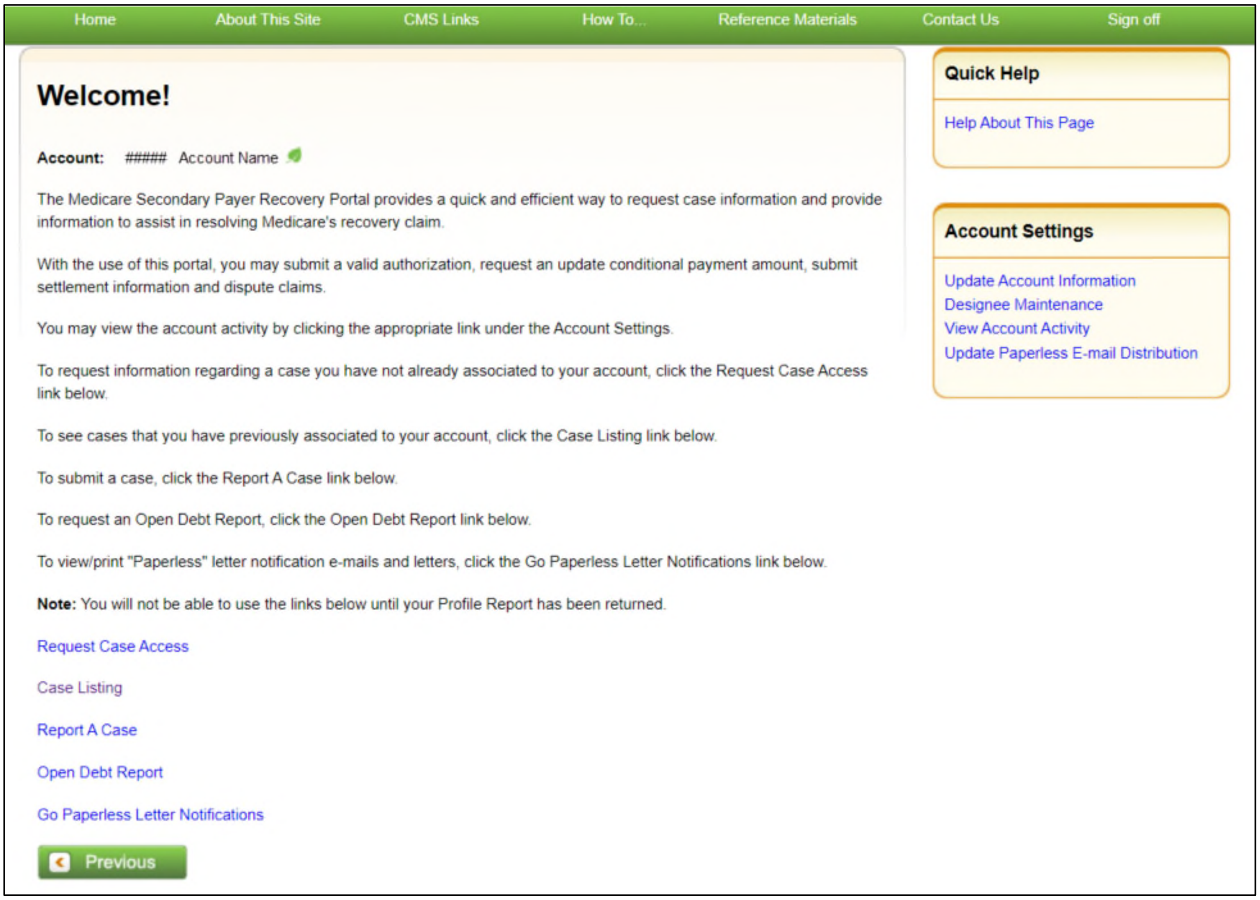
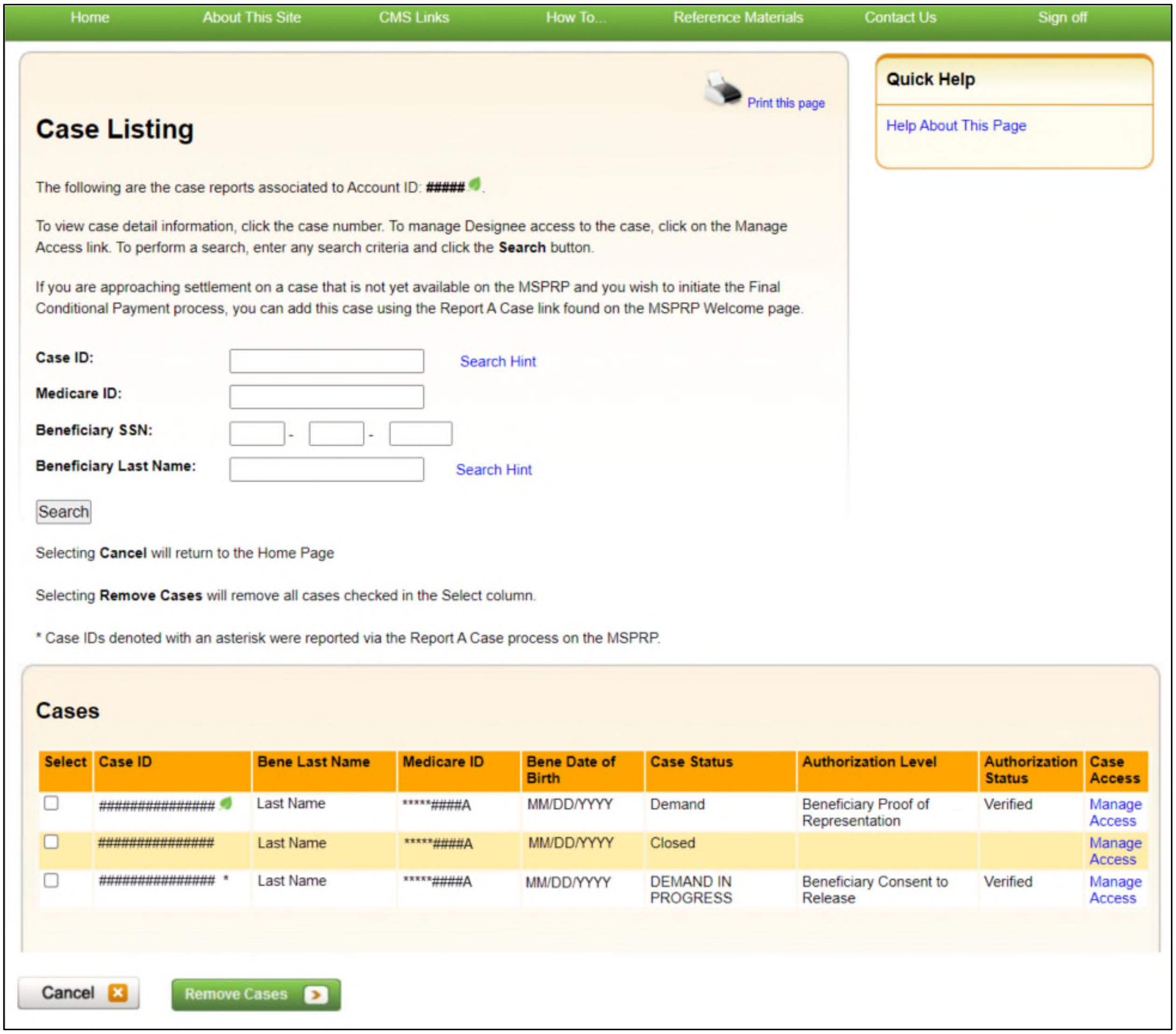


Figure 2-4: Case Listing


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

Print this page

Quick Help

Help About This Page

Case Listing

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

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

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

Case ID: Search Hint

Medicare ID:

Beneficiary SSN: - -

Beneficiary Last Name: Search Hint

Search

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

Selecting **Remove Cases** will remove all cases checked in the Select column.

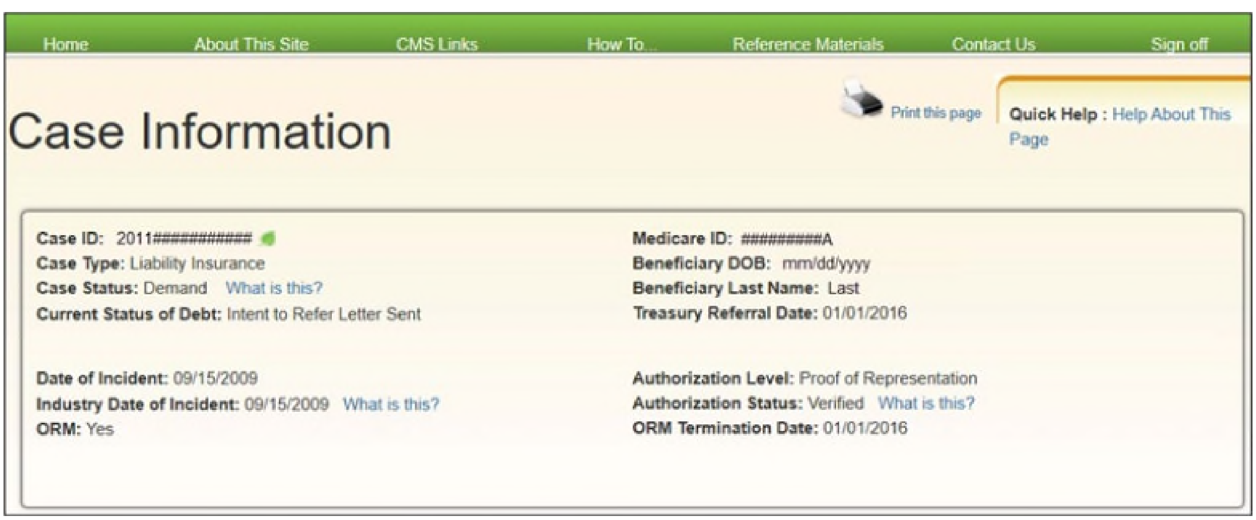
* Case IDs denoted with an asterisk were reported via the Report A Case process on the MSPRP.

Cases

Select	Case ID	Bene Last Name	Medicare ID	Bene Date of Birth	Case Status	Authorization Level	Authorization Status	Case Access
☐	###############	Last Name	*****####A	MM/DD/YYYY	Demand	Beneficiary Proof of Representation	Verified	Manage Access
☐	###############	Last Name	*****####A	MM/DD/YYYY	Closed			Manage Access
☐	############### *	Last Name	*****####A	MM/DD/YYYY	DEMAND IN PROGRESS	Beneficiary Consent to Release	Verified	Manage Access

Cancel Remove Cases

Figure 2-5: Case Information (Header Fields)


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

Print this page

Quick Help : Help About This Page

Case Information

Case ID: 2011############

Case Type: Liability Insurance

Case Status: Demand What is this?

Current Status of Debt: Intent to Refer Letter Sent

Medicare ID: #########A

Beneficiary DOB: mm/dd/yyyy

Beneficiary Last Name: Last

Treasury Referral Date: 01/01/2016

Date of Incident: 09/15/2009

Industry Date of Incident: 09/15/2009 What is this?

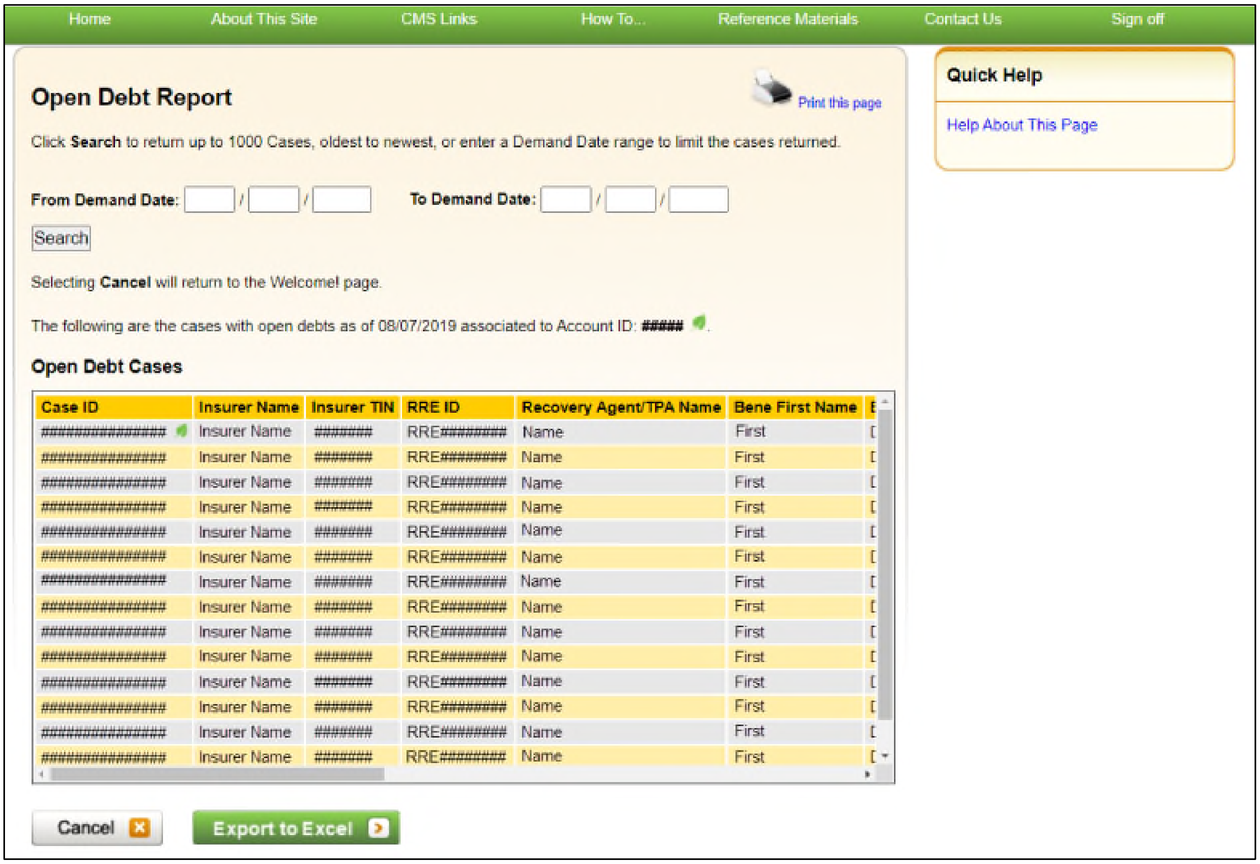
ORM: Yes

Authorization Level: Proof of Representation

Authorization Status: Verified What is this?

ORM Termination Date: 01/01/2016

Figure 2-6: Open Debt Report



2.2.2 Viewing Go Paperless Letter Notifications and Emails

If you are an account manager (AM) or account designee (AD), you can view letter notification emails and letters sent to the account within the last 30 days for Go Paperless addresses using the *Go Paperless Letter Notifications* page. You may also view these letters at any time on the *Letter Activity* tab of the *Case Information* page.

To view Go Paperless letter notification emails and letters:

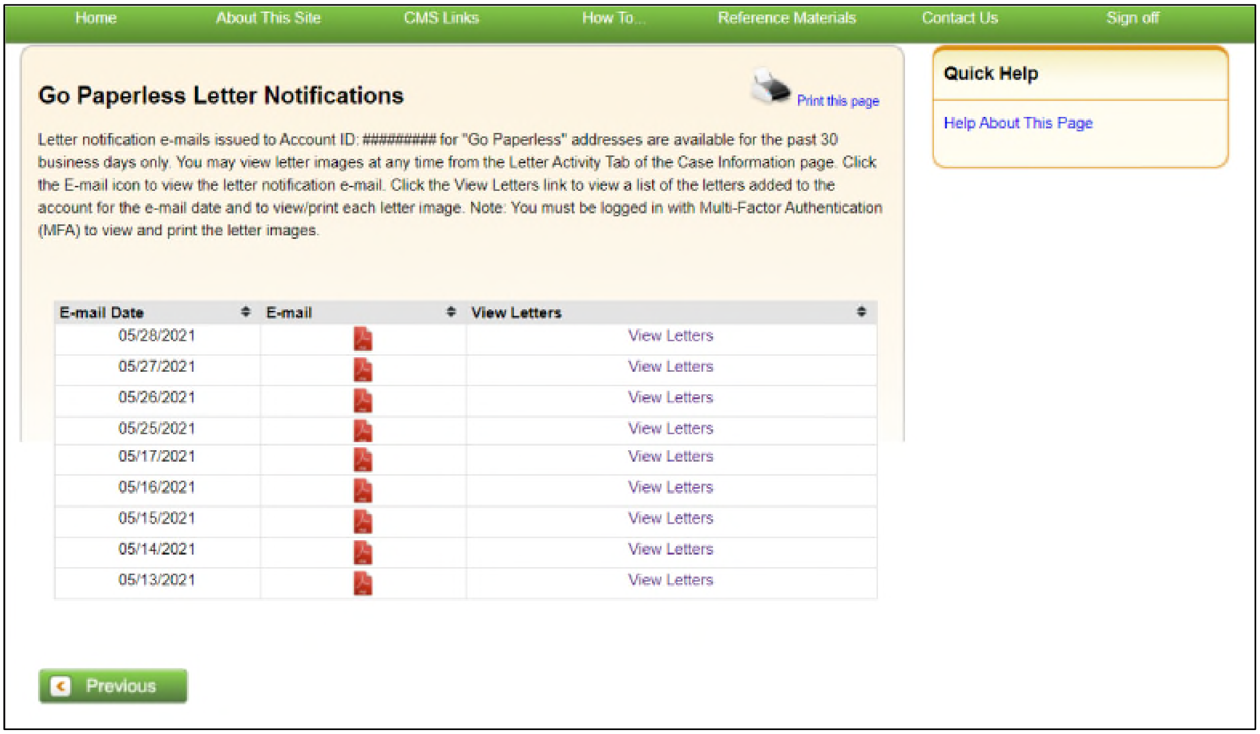
1. Log in to the MSPRP: https://www.cob.cms.hhs.gov/MSPRP/
2. From the *Account List* page, click the **Associated Account ID** for the paperless account you want to view.

   The *Welcome!* page appears (Figure 2-3).
3. Click the **Go Paperless Letter Notifications** link.

   The *Go Paperless Letter Notifications* page appears (Figure 2-7).

   Note: This link only appears if you are an AM or AD viewing an account that is associated with at least one address that is opted in to Go Paperless or the account has at least one letter notification email that was sent within the last 30 business days.

Figure 2-7: Go Paperless Letter Notifications



4. Click the PDF icon to view a PDF of the letter notification email in a new window.

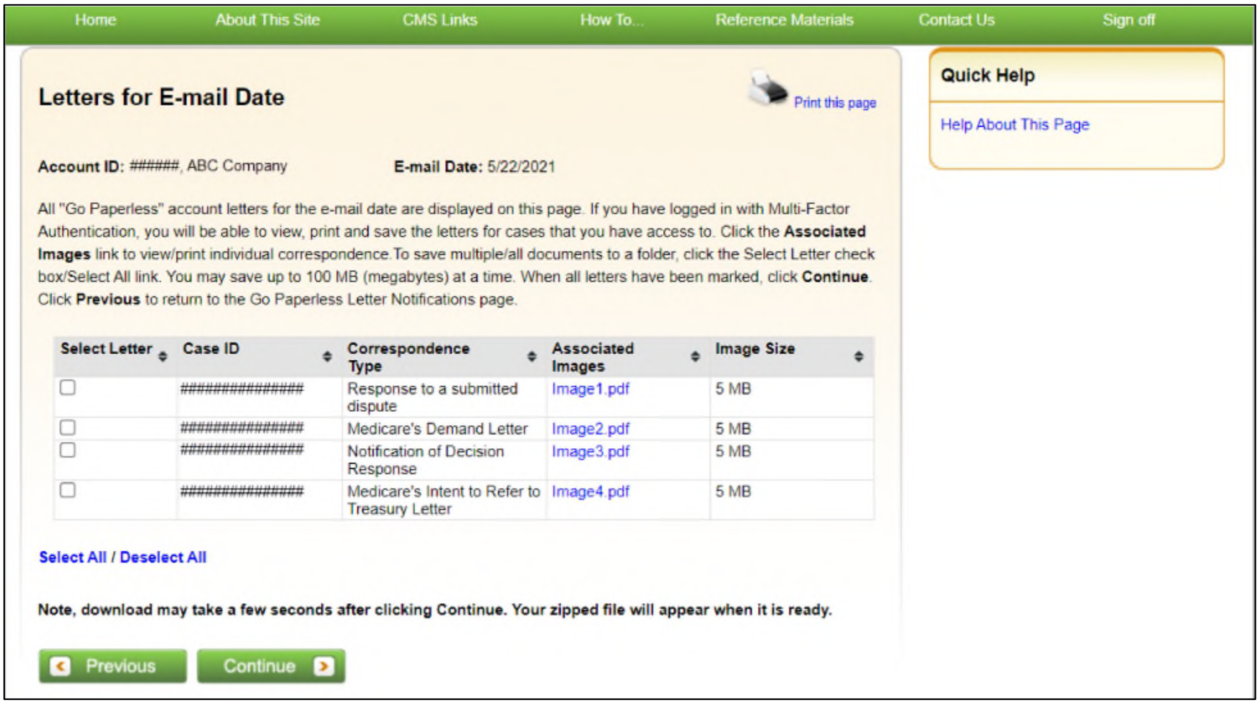
   Note: Close or minimize this window to return to the *Go Paperless Letter Notifications* page.

5. Click the **View Letters** link to view a list of letters added to the account for the selected email date.

   The *Letters for E-mail Date* page appears (Figure 2-8).

   Note: You must be logged in with MFA to view, print, and save the letters and their associated images.

Figure 2-8: Letters for E-mail Date



6. To download individual letters, click the hyperlinked filename in the *Associated Images* column to open a PDF of the associated letter image in a new window.
7. To download multiple letters, click one or more of the *Select Letter* checkboxes or click the **Select All** link and click **Continue** to save.

   Notes: You may only save files of up to 100 MB (megabytes) total at one time.

   You can deselect all the letters by clicking **Deselect All** link.

2.2.3 Updating the Go Paperless Email Distribution List

If you are an AM, you can manually enter or update one additional email address for an individual or distribution list to receive letter notification emails. You can also indicate whether you want ADs to be copied on these emails.

To update the Go Paperless email distribution list:

1. From the *Account List* page, click the **Associated Account ID** for the paperless account you want to view.

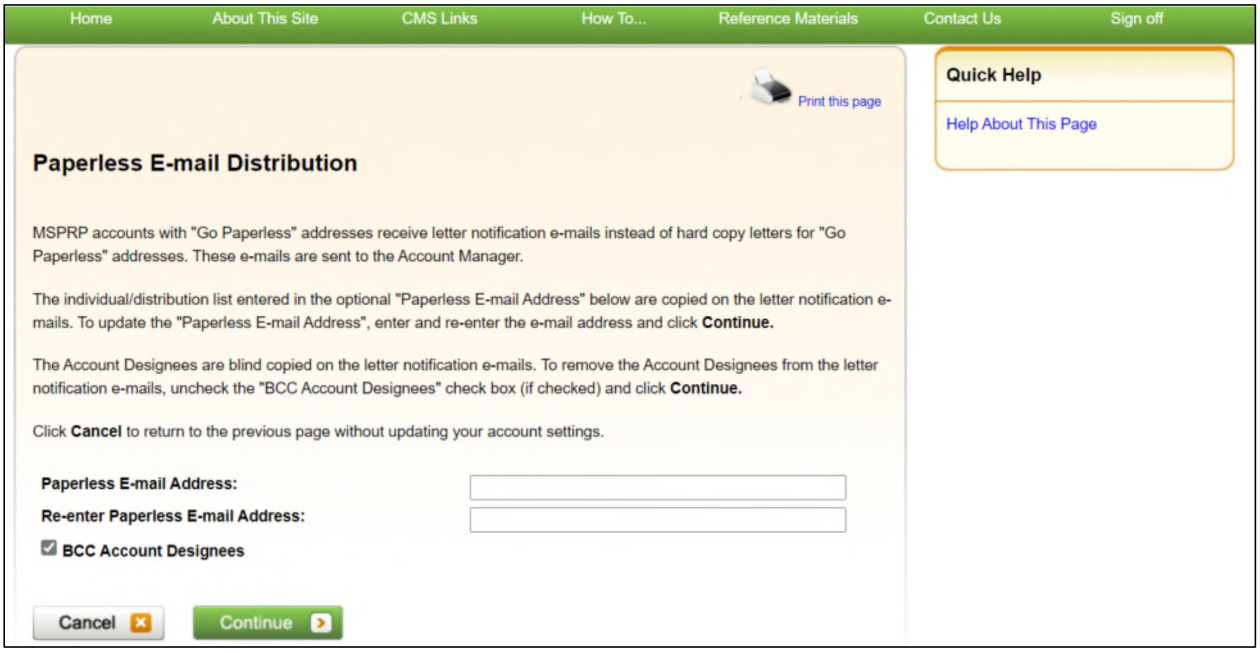
   The *Welcome!* page appears (Figure 2-3).

2. Click the **Update Paperless E-mail Distribution** link.

   The *Paperless E-mail Distribution* page appears (Figure 2-9).

   Note: This link only appears if you are an AM viewing an account that is associated with at least one address that is opted in to Go Paperless.

Figure 2-9: Paperless E-mail Distribution



3. Enter the additional email address that you want to be copied on the letter notification emails, if any, and re-enter the email address.
4. Deselect the *BCC Account Designees* checkbox if you do not want the ADs to be copied on the letter notification email or select the checkbox if you want the ADs to be copied.
5. Click **Continue** to confirm your changes and go to the *Paperless E-mail Distribution Confirmation* page (Figure 2-10) or **Cancel** to discard your changes and return to the previous page.
6. From the *Paperless E-mail Distribution Confirmation* page, review your changes and click **Continue** to return to the *Welcome!* page.

   Note: You will receive a confirmation email with your updates, and the account representative (AR) will be copied on the email.

Figure 2-10: Paperless E-mail Distribution Confirmation