

Massachusetts



Payment Intercept Program

Department of Revenue

PIP

User Guide

THE PAYMENT INTERCEPT PROGRAM

In March, 1998, Governor Cellucci signed legislation refining the statute under which DOR intercepts insurance claim payments and uses them to pay past-due child support obligations. As a result, the Payment Intercept Program (PIP) was created by DOR's Child Support Enforcement Division. Originally, this initiative required DOR and insurance companies to work together to identify pending claim payments owed to parents who have child support debts and to ensure that the money goes to support their children. The child support requirements of PIP are set out in [G.L. c. 175, § 24D](#) and [830 CMR 175.24D.1.1](#)

PIP has proven to be an extremely successful tool, resulting in child support collection of more than \$30 million since the program's inception, and was selected by the Federal Office of Child Support Enforcement as one of the nation's "Best Practices and Good Ideas in Child Support Enforcement" in 2001. DOR expanded its web site so that public retirement boards could access the PIP web site to determine whether individuals receiving public retirement payments owed past-due support.

Based on the success of PIP, new legislation was enacted to allow for the intercept of insurance claim payments to satisfy debts in addition to past-due support. In July 2003, [G.L. c. 175, § 24E](#) was enacted, authorizing MassHealth and the Department of Transitional Assistance (DTA) to intercept insurance payments for the purpose of recovering public assistance benefits. In December 2004, [G.L. c. 175, § 24F](#), was enacted authorizing DOR's Taxpayer Services Division to intercept insurance claim payments for the purpose of paying delinquent taxes owed to the Commonwealth.

DOR worked with industry representatives and the Division of Insurance to design PIP to facilitate timely processing of claims. With the expansion of PIP, DOR and MassHealth worked together to ensure that insurance companies would have a single point of entry for accessing and transmitting information about insurance claim payments to determine if the payments are subject to liens for past-due child support, delinquent taxes or recovery of public assistance benefits.

The Payment Intercept Program helps families provide for their children and also relieves the burden borne by the citizens of the Commonwealth when individuals fail to pay their taxes. PIP furthers the goal of the Medicaid program, which provides both medical and financial public assistance benefits to low-income families.

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Log In Page

The screenshot shows the login page for the Mass.gov Payment Intercept Program. At the top left is the Mass.gov logo and navigation links: home, online services, agencies, elected officials, help. The page title is 'Mass Dept of Revenue Payment Intercept Program'. On the left, there are three links: 'New Company Registration Request', 'Forgot Password', and 'Check on my request status'. In the center is a login form with the instruction 'Enter your User Name and Password below.' It contains two input fields for 'User Name' and 'Password', with a note 'Password is case-sensitive' and a 'Log In' button. On the right, there is a 'GET HELP' section with a link for 'Payment Intercept Program Help'. The footer contains copyright information: '©2005 Massachusetts Department of Revenue Version=1.0.1957.15175' and links for 'privacy policy' and 'terms of use'.

User Name: Enter your assigned User Name.

Password: Enter your personal Password. Passwords are case sensitive.

? **GET HELP:** Use this link to review on-line PIP Guide, Frequently Asked Questions (FAQ's), and review information about the Payment Intercept Program.

Links (for use only by PIP Master Administrator)

New Company Registration Request: Used only for an insurance company, organization or public retirement board that is not currently registered to use the PIP web site and wants to register.

Forgot Password: Used by a registered organization's PIP Master Administrator (PMA) to have his or her password reset by DOR when the organization has only one registered PMA. All other users can contact a PMA within their organization to have their password reset by the PMA

Check on My Request Status: Use this link to check on your new registration submission or to check on the forgot your password submission.

Home Page

Once your User Name and Password are verified, you will see the PIP Home page. The Home page includes PIP's message area, which we will use to keep all users about the program. DOR will periodically update this with new information.

Mass.gov • home • online services • agencies • elected officials • help

home lookup account management reports log off

Home Mass Dept of Revenue
Payment Intercept Program

Welcome <User Name> ,

Since its inception in 1999, the Child Support Enforcement Division's Payment Intercept Program (PIP) has collected more than \$30 million in past-due child support.

Because PIP has proven to be such a valuable tool in the collection of past-due child support, legislation was enacted enabling DOR's Taxpayer Services Division and MassHealth to intercept insurance claim payments through PIP as well.

Insurance companies now access the PIP secure Internet web site to identify pending claim payments owed to claimants who have child support or tax debts or who are subject to liens to secure repayment of public assistance benefits. As a result of your participation in PIP, children get the child support they deserve and taxpayers of the Commonwealth save millions of dollars.

On behalf of all of the children, families and taxpayers who benefit from your efforts, the Commonwealth says, "Thank You!"

GET HELP

- Payment Intercept Program Help

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Menu Bar

home	lookup	account management	reports	log off
	Perform lookup	Your Profile	Lookup History Report	
	Your lookup history	Change Password		
		View Users		
		Company Group Profile		

Menu Option Descriptions

Menu Item	Description
home	PIP Home Page: Find out information about PIP.
lookup	Perform Lookup: Submit a query for one or more SSN. Your Lookup History: View your lookup history.
account management	Your Profile: View and change your personal information. Change Password: Change your password. View Users: <i>(PMA Option Only)</i> View all user accounts for your company and perform administrative tasks relating to accounts. Company Group Profile: <i>(PMA Option Only)</i> View, edit, and add company information.
reports	Lookup History: <i>(PMA Option Only)</i> Cumulative report of all lookups performed by your company's PPA and PMA's.
log off	PIP Log off: Click to log off the PIP site.

LookUp Menu

lookup
Perform lookup
Your lookup history

LookUp Menu Options Descriptions

Perform LookUp: The Perform Lookup page is where users enter Social Security numbers (SSN) of claimants, beneficiaries or retirement board members to determine whether there is a match with data from DOR’s Child Support Enforcement Division, DOR’s Taxpayer Services Division, and MassHealth.

Lookup Social Security Number

Enter one or more social security numbers. Separate each social security number with a comma.

Social security numbers may contain dashes, but are not required. For instance, XXX-XX-XXXX and XXXXXXXXX are both acceptable forms.

Social Security Number(s)

[Submit](#)

Your LookUp History: Page where you can review all the Social Security numbers you have submitted through the PIP site. The LookUp History list is presented from the newest to oldest lookups.

Lookup History			
	<input type="checkbox"/> Personal Property Damage		Documents
3/30/05 11:54A	ROBERT JONES	Child Support	Match
Mismatch?	* Not on File *	MassHealth	NoMatch

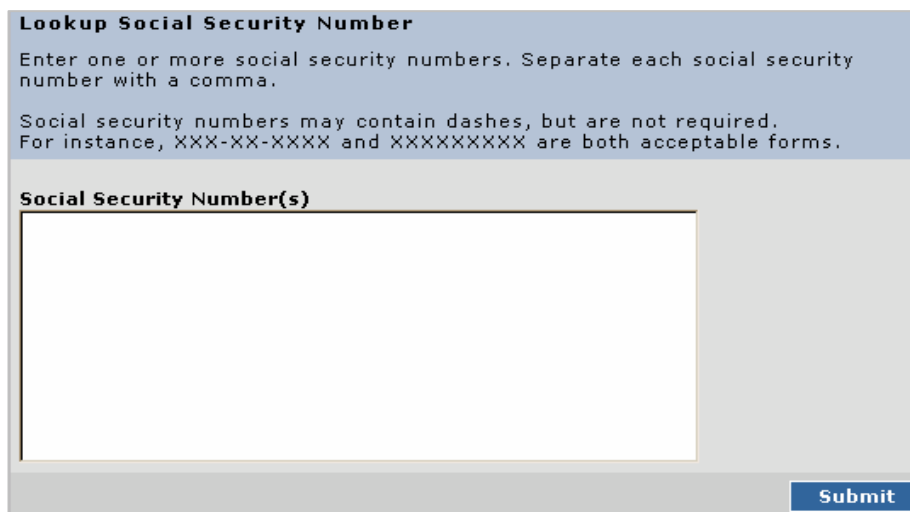
Perform LookUp Page

This is where you actually enter Social Security numbers (SSN's) of claimants, beneficiaries or retirement board members to determine whether there is a match with data from DOR's Child Support Enforcement, DOR's Taxpayer Services Division and MassHealth.

Social Security Number Format: Enter one or more SSN in the Social Security number(s) text box. Dashes within each SSN are acceptable but not required. If entering more than one SSN, you must use commas to separate each SSN.

Example: 111111111,222222222,333333333,444-44-4444

Submitting SSN's for Lookup: After you enter the SSN's, click on the <Submit> button to begin the lookup process.



The screenshot shows a web form titled "Lookup Social Security Number". The form has a light blue header with the title. Below the header, there is instructional text: "Enter one or more social security numbers. Separate each social security number with a comma." and "Social security numbers may contain dashes, but are not required. For instance, XXX-XX-XXXX and XXXXXXXXXX are both acceptable forms." Below this text is a large, empty text input box with a thin border. To the right of the input box, there is a blue button with the word "Submit" in white text.

REMINDER:

- THE LAW REQUIRES INSURANCE COMPANIES TO CHECK NO MORE THAN 10 DAYS PRIOR TO PAYING A CLAIM.
- IF YOU SUBMIT AN SSN MORE THAN 10 DAYS PRIOR TO PAYMENT, YOU MUST SUBMIT THE SSN AGAIN WITHIN 10 DAYS OF THE DATE YOU INTEND TO ISSUE THE SETTLEMENT CHECK.
- FAILURE TO DO SO MAY RESULT IN YOUR COMPANY BEING HELD LIABLE FOR ANY MONEY DOR OR MASSHEALTH WOULD HAVE COLLECTED.

Lookup Results Page

Every SSN submitted to PIP generates a LookUp result. If multiple SSN's are submitted at the same time, the LookUp Results page includes a result entry for each SSN submitted, with the following information:

- ✓ SSN submitted to PIP,
- ✓ Date and time of submission,
- ✓ Personal Property Damage box,
- ✓ Line entry with search results for each agency to which the SSN was submitted.

If you are an Insurance User:

Lookups will be performed against the Child Support, MassTax and MassHealth data.

If you are a Life Insurance User:

Lookups will be performed against the Child Support and MassTax data.

If you are a Retirement Board User:

Lookups will be performed against Child Support data only.

Notes Regarding Search Results:

1. **Child Support and MassTax Results:** You will know immediately whether or not the submitted SSN matches Child Support and MassTax data. The LookUp Result will instantaneously display “Match” or “No Match.” If there is a match, you will need to click on the Documents link, once it appears. If there is a potential match with MassHealth, the link will not appear until you provide additional information.
2. **MassHealth Results:** The only time you will receive an instantaneous response from MassHealth is when the submitted SSN does not match any SSN in MassHealth’s database, in which case “No Match” will immediately display. In the event a submitted SSN matches any SSN in the MassHealth database, you will need to provide some preliminary information about the claim, in addition to the SSN. You will see “Action Required” in the MassHealth Line entry.

Entered SSN Date &* Time of Lookup Mismatch?

Agency Name

Search Results

Entered SSN Date &* Time of Lookup Mismatch?	Personal Property Damage	Agency Name	Search Results
5/12/05 12:54P Mismatch?	<input type="checkbox"/> Personal Property Damage	Child Support	NoMatch
	* Not on File *	MassHealth	NoMatch
	* Not on File *	MassTax	NoMatch
5/12/05 12:54P Mismatch?	<input type="checkbox"/> Personal Property Damage	Child Support	NoMatch
	* Not on File *	MassHealth	Action Required
	MARIA EVORA	MassTax	NoMatch
	* Not on File *		

[New Search](#)

- Personal Property Damage or Life Insurance
- Name associated with SSN or,
- Not on File*

Search Results will display as one of the following:

- **No Match** - Agency does not have a lien for anyone associated with the submitted SSN.
- **Match** - Agency has a lien for individual with the name and submitted SSN.
- **Action Required** - Additional information needed before MassHealth can determine whether there is a potential match.
- **Pending:** Response due from MassHealth within 10 business days.
- **Incomplete:** Search not complete because user did not enter required information.
- **Expired:** No lien because MassHealth did not provide response within required 10 business days.

No Match - All Agencies

If a submitted SSN does not match with any agency, no further action is required.

Mismatch? link

<input type="checkbox"/> Personal Property Damage			
5/9/05 8:42A	* Not on File *	Child Support	NoMatch
Mismatch?	* Not on File *	MassHealth	NoMatch
	* Not on File *	MassTax	NoMatch

Use **Mismatch?** when the name displayed for the submitted SSN does not match the name of the claimant, beneficiary or retirement member. Some mismatches may occur because of misspelling, name changes relating to marriage or divorce, or possible fraud. You may need to do some research to make sure that none of these apply. The example below shows Robert Jones and Timothy Shurick as matching with the same SSN from two agencies. You confirm Robert Jones is the correct person that matches the submitted SSN.

Name Mismatch

<input type="checkbox"/> Personal Property Damage			Documents
3/30/05 11:54A	ROBERT JONES	Child Support	Match
Mismatch?	* Not on File *	MassHealth	NoMatch
	TIMOTHY SHURICK	MassTax	Match

Clicking **Mismatch?** will bring you to the “Are any line items incorrect?” page. Click on the box next to the incorrect name, which is Timothy Shurick in our example, and then click the <Save> button.

Are any line items incorrect?

This application searched multiple data sources to yield these results. If you think that any of the line items are incorrect for any reason, please let us know by selecting the checkbox next to the incorrect result and clicking Save.

<input type="checkbox"/>	ROBERT JONES	Child Support	Match
<input type="checkbox"/>	* Not on File *	MassHealth	NoMatch
<input checked="" type="checkbox"/>	TIMOTHY SHURICK	MassTax	Match

You will return to the Lookup History page. The **Mismatch?** link is now shaded and the incorrect name is ~~crossed out~~. Continue as if this was a “No Match” for that agency.

Lookup History

Personal Property Damage [Documents](#)

3/30/05 11:54A

Mismatch?	ROBERT JONES	Child Support	Match
	* Not on File *	MassHealth	NoMatch
	TIMOTHY SHURICK	MassTax	Match

Store and Forward Queue

If the PIP site is unable to immediately process a Social Security Number (SSN) Lookup request the SSN is placed in a Store and Forward Queue for processing. If this occurs, users will see the status of “**Pending**” for the SSN lookup entered.

Periodically, the site processes the queue. After the queue is processed, users will receive an email to check the status of the lookup.

When you see the status of “**Pending**”, users are required to wait until the status of the lookup changes before you can continue with that particular SSN lookup.

During this time, users can continue to perform new lookups, or, they can work / review previously submitted lookups.

Email received – Completing the Lookup:

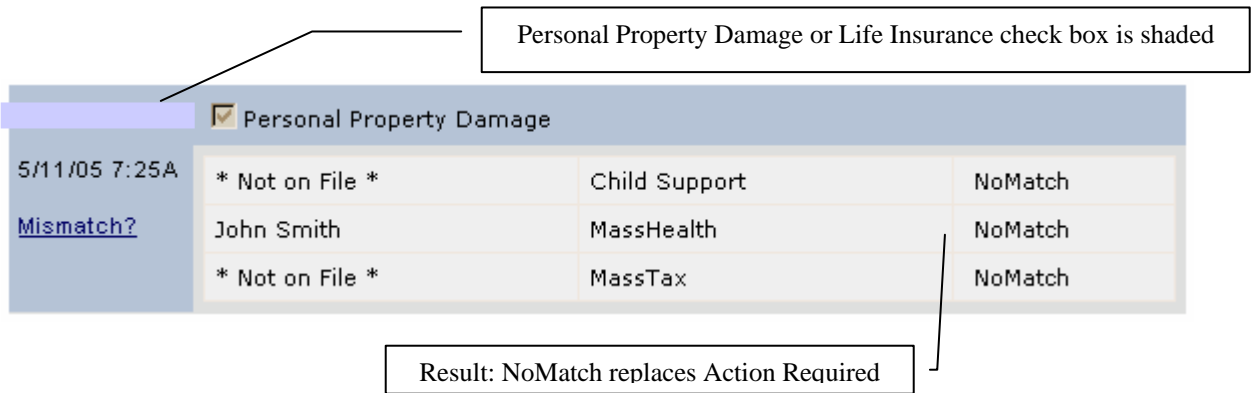
Using the link contained in the email to login to the pip site, users will be directed to the lookup whose status has changed. The following results are possible -

- User may be required to provide additional information if the lookup displays “**Action Required**”.
- Or, users may be given a definitive answer of **Match, NoMatch, Expired** or **Incomplete**
- If the status is “**Incomplete**” users are required to re-submit the social security number due to the fact that the additional information required for the lookup was not provided the first time the lookup was performed.
- A status of “**Expired**” can effectively be treated as if it were a **NoMatch**.

Personal Property or Life Insurance claim Check box

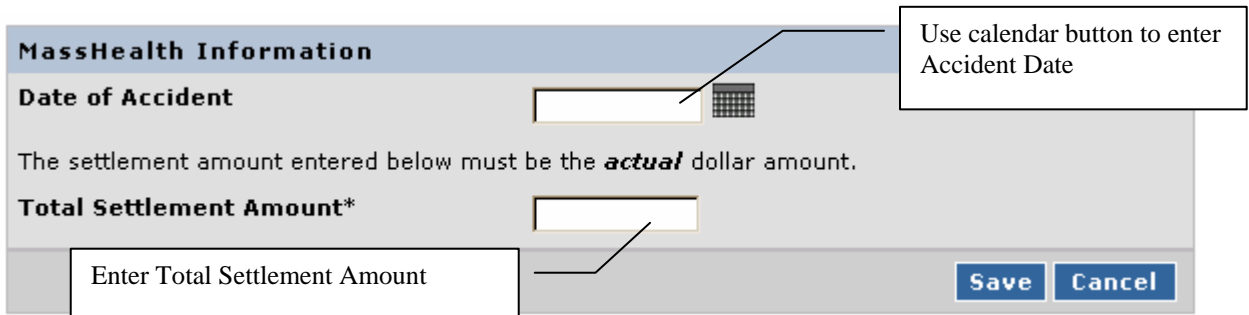
➤ Is the claim for **Personal Property Damage or Life Insurance**?

If **YES**: Select the “Personal Property Damage or Life Insurance” checkbox located at the top of the LookUp Result for that SSN. This will cause “Action Required” in the MassHealth entry to change to “No Match” instantaneously and “Personal Property Damage or Life Insurance” to become shaded. MassHealth cannot exert a lien against claims for personal property damage or Life Insurance claims.



If **NO**: If the claim is not for Personal Property Damage or Life Insurance, click on “**Action Required**” on the MassHealth line entry and you will see the MassHealth Information page, as shown below:

- **Date of Accident:** Enter actual accident date, using either the calendar button or in the format MM/DD/YY.
 - **Total Settlement Amount:** Enter the settlement amount in dollar figures. This is a mandatory field.
- If the Date of Accident DOES NOT MATCH the MassHealth Eligibility Dates, “Action Required” will instantaneously change to “No Match.”
- If the Date of Accident MATCHES the MassHealth Eligibility Date, you will be required to enter more information about the claim.



The **Supplemental Information Page** (shown below) will appear if Child Support and MassTax both reported “NoMatch.” is presented. All * marked fields are **mandatory**.

Attorney Involved?* <input checked="" type="radio"/> Yes <input type="radio"/> No	
Attorney Information	
Attorney Name*	<input type="text"/>
Address*	<input type="text"/> <input type="text"/>
City*	<input type="text"/>
State* / Zip Code*	MA <input type="text"/> - <input type="text"/>
Attorney Phone*	<input type="text"/>
MassHealth Information	
Type of Accident*	<input type="text"/>
Type of Injury Sustained* (select up to three)	<input type="checkbox"/> Abdomen <input type="checkbox"/> Emotional <input type="checkbox"/> Knee <input type="checkbox"/> Ankle <input type="checkbox"/> Facial <input type="checkbox"/> Leg <input type="checkbox"/> Arm <input type="checkbox"/> Fingers <input type="checkbox"/> Neck <input type="checkbox"/> Back <input type="checkbox"/> Foot <input type="checkbox"/> Ribs <input type="checkbox"/> Buttocks <input type="checkbox"/> Hand <input type="checkbox"/> Shoulder <input type="checkbox"/> Chest <input type="checkbox"/> Head <input type="checkbox"/> Wrist <input type="checkbox"/> Elbow <input type="checkbox"/> Hip <input type="checkbox"/> Other
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

1 Agency shows Match

- **If Child Support or MassTax is the only agency to show “Match” for a submitted SSN, follow these steps:**
- Click the “Documents” Link at the top of the LookUp Result for that SSN.
 - Complete the Additional Information page (see Instructions below).
 - Click the <Documents> button located at the bottom of the Additional Information page.
 - Click the <Printer Friendly Page> button, to open the printer friendly window.
 - Print the Child Support or MassTax documents using the printer icon or by selecting the File\Print option on the Menu bar.

Documents

If the “Documents” link is visible on a LookUp Result, it means you must provide additional information to complete the LookUp.

The documents link will only appear in the event of a match.

Clicking on “Documents” will bring you to the Additional Information page.

Additional Information

NOTE: Users only have to complete the Additional Information page when a submitted SSN matches a SSN in at least one agency’s database.

Attorney Involved?*	<input checked="" type="radio"/> Yes <input type="radio"/> No
Total Amount Due	
Total Settlement Amt*	<input type="text"/>
Attorney Information	
Firm or Attorney Name*	<input type="text"/>
Address*	<input type="text"/> <input type="text"/>
City*	<input type="text"/>
State* / Zip Code*	MA <input type="text"/> - <input type="text"/>
Attorney Phone*	<input type="text"/>
Claimant Information	
Social Security Number	
Address*	<input type="text"/> <input type="text"/>
City*	<input type="text"/>
State* / Zip Code*	MA <input type="text"/> - <input type="text"/>
Insurance Information	
Claim No*	<input type="text"/>
<input type="button" value="Save"/> <input type="button" value="Back"/> <input type="button" value="Documents"/>	

Instructions: You must complete all fields that are not shaded. Those that are marked * are **mandatory**. If you miss any mandatory fields, the web site will alert you to complete the missed field. The only optional data entry fields are the 2nd address lines and the Zip Plus 4 field for enhanced zip code delivery. The following explains what each field is and how to complete the field.

Attorney Involved?	Button Default is YES . If claimant has no attorney, click NO.
Total Amount Due	Auto-filled by PIP. Represents total owed to all agencies that are exerting liens.
Total Settlement Amt*	Enter the gross settlement, policy or refund payout, without any deductions.
Attorney Information (If "NO" is clicked at top of page, all fields will be shaded)	
Attorney Name*	Enter firm or attorney name.
Address*	Enter street address or post office box.
City*	Enter city or town.
State* / Zip*	Select state from listing then enter the Zip Code. If known, also enter the Zip + 4 value.
Attorney Phone*	Enter phone number, beginning with area code.
Claimant Information	
Social Security Number	Auto-filled by PIP.
Address	Enter the claimant's street address.
City*	Enter city or town.
State* / Zip*	Select state from listing then enter the Zip Code. If known, also enter the Zip + 4 value.
Claim No*	Enter claim or policy number. If none, enter N/A.

2 Agencies Matched

This is an example of a 2-agency match.

<input type="checkbox"/> Personal Property Damage		Documents	
3/30/05 11:54A	ROBERT JONES	Child Support	Match
Mismatch?	* Not on File *	MassHealth	NoMatch
	ROBERT JONES	MassTax	Match

3 Agencies Matched

This is an example of a 3-agency match.

<input type="checkbox"/> Personal Property Damage		Documents	
5/11/05 9:54A	LISA SULLIVAN	Child Support	Match
Mismatch?	LISA SULLIVAN	MassHealth	Match
	LISA SULLIVAN	MassTax	Match

NOTE: When a submitted SSN matches with MassHealth and at least one other agency, you will follow the same basic process outlined below for when MassHealth is the only agency with a match but two steps will be combined. You will see “Action Required” on the MassHealth line:

- Click on “Personal Property Damage” if claim is for personal property
- Click on “Action Required” if the claim is not for personal property
- You must then enter the date of accident and settlement amount
- You must then go directly to the Additional Information page and enter all information relating to the claim, including the accident information.
- You must wait for an automated e-mail to notify you of a change to “Pending” status

MassHealth ONLY Match

Attorney information

- If any attorney IS INVOLVED, enter the Name of Firm or attorney; address, phone.
- If an attorney IS NOT involved, select the No button
- Total Payout*: Enter the Total Settlement (Payout) of the claim

MassHealth Information

- Type of Accident*:
 - Select type from drop down list
- Types of Injury Sustained*:
 - Select up to 3 injury Types.
 - When all Additional Information fields are completed, click the <Save> button

After clicking the <Save> button, your data will be saved and you will return to LookUp Results page. **Note that “Action Required” is replaced with “Pending.”**

Pending MassHealth Match

MassHealth has up to 10 business days to research whether it has a lien against the claim. You will receive an automated e-mail from PIP alerting you that there has been a change to the “Pending” status.

	<input type="checkbox"/> Personal Property Damage		Documents
3/30/05 12:19P	* Not on File *	Child Support	NoMatch
Mismatch?	John Smith	MassHealth	Pending
	* Not on File *	MassTax	NoMatch

Pending Child Support or MassTax Match

Child Support or MassTax **Pending** will occasionally occur if the site is experiencing heavy traffic. If you receive a **Pending** for Child Support or MassTax you will receive a site generated email when the site traffic subsides.

	Personal Property Damage		
5/27/05 10:14P	MARIO MARTINEZ	Child Support	Pending
Mismatch?	* Not on File *	MassHealth	* Not on File *
	MARIO MARTINEZ	MassTax	Pending

INCOMPLETE Child Support, MassTax Match, or MassHealth Match

After **ten business days**, the status of a lookup changes from **Action Required** to **Incomplete** when the agency could not research the Social Security number (SSN) because you did not click the **Action Required** link and did not complete the required additional information. Only when you see a status of **Pending** have you submitted all necessary information and are awaiting the agency’s response.

An **Incomplete** status means the Social Security number has not been properly submitted and you must resubmit the Social Security number to satisfy the legal requirements.

<input type="checkbox"/> Personal Property Damage or Life Insurance			
6/6/05 2:52P	* Not on File *	Child Support	NoMatch
Mismatch?	MARIO MARTINEZ	MassHealth	Incomplete
	* Not on File *	MassTax	NoMatch

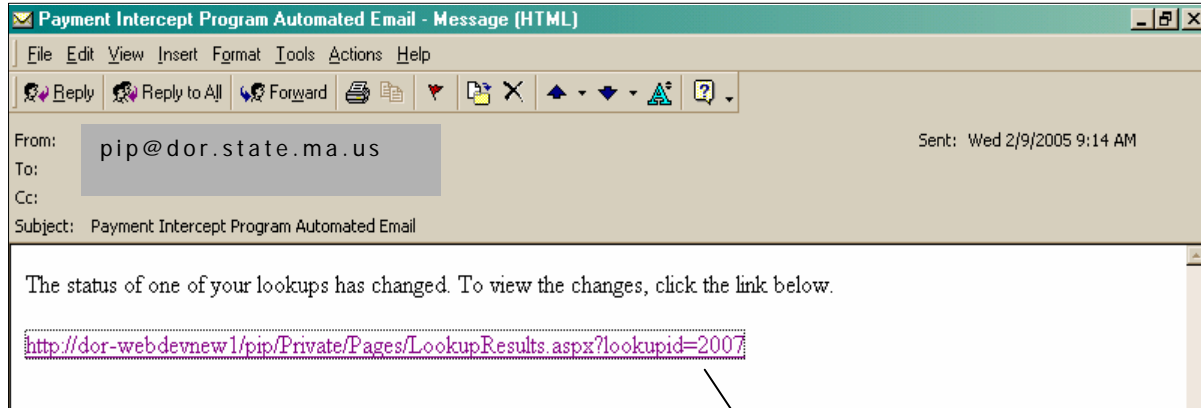
EXPIRED Child Support, MassTax Match, or MassHealth Match

After ten business days, the status of a lookup changes from **Pending** to **Expired**, which qualifies as a **NoMatch** for the Social Security number. You do not have to resubmit the SSN unless there is a delay in the settlement.

<input type="checkbox"/> Personal Property Damage or Life Insurance			
6/6/05 2:52P	* Not on File *	Child Support	NoMatch
Mismatch?	MARIO MARTINEZ	MassHealth	Expired
	* Not on File *	MassTax	NoMatch

Automated E-mail Message

- Click the hyperlink in the email.
- After successfully logging onto the PIP site, the site will direct the user to the Lookup History page for the SSN whose status has changed. A user can be presented with Action Required, No Match, or Incomplete.
- Click the “**Action Required**” link.



			Documents
2/9/05 9:08A	* Not on File *	Child Support	NoMatch
	John Smith	MassHealth	Action Required
	* Not on File *	MassTax	NoMatch

Additional Information Page

The information you previously entered will be shown. You must now complete the Claimant Information and Claim Number (Claim No.) fields.

Users are required to complete the Claimant information and Claim number fields

Attorney Involved?*	<input checked="" type="radio"/> Yes <input type="radio"/> No
Total Amount Due	
Total Settlement Amount*	<input type="text"/>
Attorney Information	
Attorney Name*	<input type="text"/>
Address*	<input type="text"/> <input type="text"/>
City*	<input type="text"/>
State* / Zip Code*	MA <input type="text"/> - <input type="text"/>
Attorney Phone*	<input type="text"/>
Claimant Information	
Social Security Number	<input type="text"/>
Address*	<input type="text"/> <input type="text"/>
City*	<input type="text"/>
State* / Zip Code*	MA <input type="text"/> - <input type="text"/>
Insurance Information	
Claim No*	<input type="text"/>
<input type="button" value="Save"/> <input type="button" value="Back"/> <input type="button" value="Documents"/>	



After you have completed the data entry, click the <Documents> button.

Users will be directed to the documents associated with the SSN lookup.

Select the <Printer Friendly> button.

A new window will open. Print all documents from this window. Once documents are printed, close window.

User will be directed back to Additional information page. Click <Back> button to go back to lookup results

<input type="button" value="Printer Friendly Page"/> <input type="button" value="Back"/>	
	<i>The Commonwealth of Massachusetts Executive Office of Health and Human Services MassHealth Casualty Recovery Unit P.O. Box 15205 Worcester, MA 01615-0205</i>
	
5/11/2005	
RE: SSN: Claim Number:	
NOTICE OF LIEN	
Pursuant to Massachusetts General Laws Chapter 18, section 5G and Chapter 118E, section 22, the Commonwealth of Massachusetts hereby asserts a lien against any amounts now due or which may hereafter be due John Smith or his or her heirs, assignees or legal representatives from any recovery by judgment, settlement, compromise, or other action as a result of this accident or other incident.	

Account Management Menu

Account Management Options

Site options allow all users to:

- ✓ View and edit their profile
- ✓ Change their password

In addition to the above, PMA-only options include:

- ✓ View Users
- ✓ Company Profile

account management
Your Profile
Change Password
View Users
Company Group Profile

Your Profile

View and change your personal account information.

Important: Make sure to keep your e-mail address current as many PIP functions rely on automated e-mails to users.

Your Personal Account Information

User Name

First Name

Last Name

Title

Phone Number

Email Address

Secret Question (in case you forget your user name or password)

Secret Answer

Change Password

You can change your password at any time but any new password must comply with all of the following rules. Your new password must:

- Be between 8 and 15 characters in length
- Include at least 1 UPPER CASE LETTER,
- Include at least 1 lower case letter, and
- Include at least 1 numeric value.

Password example - (e.g., **Testing1**)

NOTE: Passwords are case sensitive.

Change Password

Account Management > Change Password

Passwords must be between 8 and 15 characters, have at least 1 upper case letter, 1 lower case letter, and 1 digit. (e.g., *Example1*)

New Password

Confirm New Password

Save **Cancel**

PIP Master Administrator (PMA) Only Options

View Users – Add New, Reset Passwords, etc.

Any PMA within a company can use the “View Users” option to view all users authorized to use the MA PIP site. PMA’s can add, edit, update user’s role from Payer (PPA) to PMA or from PMA to PPA, deactivate user, and reset passwords for PPA and PMA users.

- Clicking the <Select> button next to a user names allow you to edit, deactivate, reset the password, or change role for the selected user.
- Clicking the <Create> button at the bottom of the page brings you to the page to create a new account for a new user.

User List for Company Group:		Insurance Agency		
	User Name	Last Name	First Name	Role
Select		Marotta	InsuranceMaster	MasterAccount
Select		Insurer01	Insurer01	PayerAccount
Select		O'Neill	Dolly	PayerAccount
Select		Marotta	B	PayerAccount

View User Details Page

Details

<p>User Name</p> <p>Date Deactivated (NOT SET)</p> <p>Company Group Insurance Agency</p> <p>Date Terms of Use Accepted (NOT SET)</p> <p>First Name <input type="text"/></p> <p>Title <input type="text"/></p> <p>Secret Question Mother's maiden name (Used in case the password is forgotten.)</p> <p>Phone Number ext. <input type="text"/> <input type="text"/></p> <p>Force Profile Update <input checked="" type="radio"/> Yes <input type="radio"/> No</p> <p>Temporary Password</p>	<p>Date Created 04/26/2005 12:38:08</p> <p>Last Login Date (NOT SET)</p> <p>Failed Logins 0</p> <p>Date Password Last Changed 04/26/2005 12:38:08</p> <p>Last Name <input type="text"/></p> <p>Email Address <input type="text"/></p> <p>Secret Answer <input type="text" value="TestAnswer"/></p> <p>Role <input type="radio"/> MasterAccount <input checked="" type="radio"/> PayerAccount</p>
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Assure user has entered their correct email address

You can choose the **Role** a User will play at any time.

Reset Password:
Temporary Password will be listed here

Click to **Reset** Users Password

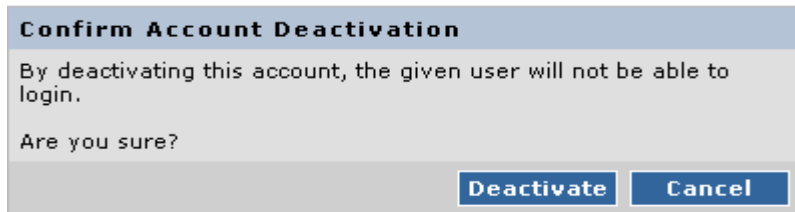
Click to **Deactivate** a User

Deactivate User

When a user leaves or is no longer working within the companies authorized PIP user group, they should be deactivated as soon as possible.

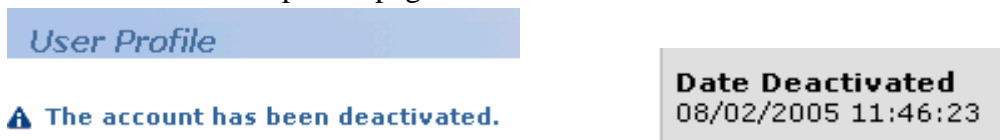
To deactivate a user:

- Select the Account Management / View Users option
- Select the User from the User List from Company Group
- Click the <**Deactivate**> button on the View User Detail page.
 - The site will present the following dialog box.



- Select the <**Deactivate**> button.

The site will present the following message at the top of the user listing and the Date Deactivated is recorded on the users profile page

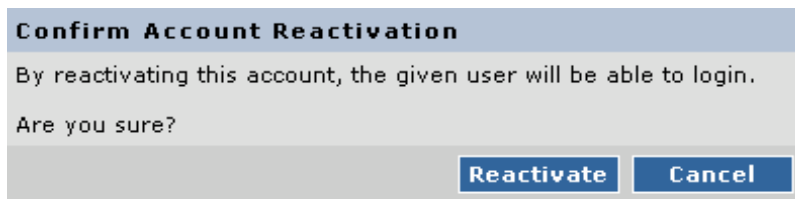


Re-activate User

If a user is deactivated in error or comes back to work for your company you can easily reactivate their existing account.

To **Re-activate** a user:

- Select the Account Management / View Users option
- Select the User from the User List from Company Group
- Click the <**Reactivate**> button on the View User Detail page.
 - The site will present the following dialog box.



- Select the <**Reactivate**> button.

The site will present the following message at the top of the user listing and the Date Deactivated will be blank



Create a New User

PMA's can easily create a New User.

- Complete all fields: First Name, Last Name, User Name
- Select Role you want the New User to have– MasterAccount or PayerAccount
- Clicking the <Save> button will create the new user and generate a Temporary Password.
- PMA's are to provide the New User the user name and the temporary password.
- PMA's can print the form out and give it to the new user, copy and paste, etc.

The screenshot shows a web form titled "Create User" with a breadcrumb trail "Account Management > View Users > Create User". The main heading is "Create New User In Company Group: Marotta's Insurance Agency". The form contains the following fields and options:

- First Name:** A text input field with a callout box that says "Enter New User's First Name".
- Last Name:** A text input field with a callout box that says "Enter New Users Last Name".
- User Name:** A text input field with a callout box that says "Create new User Name: User name typically is the user's last name followed by the first letter of their first name. Example: Name - Robert Murphy. User name - murphy".
- Role:** Two radio button options: "MasterAccount" and "PayerAccount". A callout box says "Role: Select the Role you want the User to play".
- Temporary Password:** A label with the text "(NOT SET)". A callout box says "Temporary Password: Is generated by the site. The Temp Password will appear after the <Save> button is clicked."

At the bottom right of the form are two buttons: "Save" and "Cancel".

Company Profile

A PMA can use the “Company Profile” option to edit information about your company, organization or retirement board.

TYPE: Select Insurance, Life Insurance, or Pension from the drop down list. The type selected determines which agencies your data match will match against.

- **Insurance:** If you select the **INSURANCE** type, all users performing lookups for your company will match with the Child Support, MassHealth, and MassTax agencies
- **Life Insurance:** If you select the **LIFE INSURANCE** type, all users performing lookups for your company will match with the Child Support and MassTax agencies.
- **Pension:** If you select the **PENSION** type, all users performing lookups for your board/agency will match only with the Child Support agency.

Click the <Save> button to save whatever changes you entered on the Details page.

Click the <Deactivate> button to deactivate the selected company from your company list.

Click the <View Company List> button to display a list of your associated companies.

Details

Name Date Deactivated (NOT SET)

Type Fax

Address Line 1 Address Line 2

City State Zip PlusFour

- ✓ Click the <Select> button to view and edit a listed company.
- ✓ Click the <Delete> button to deactivate the company from PIP
- ✓ Click the <Create New> button to add a new company to your Company List

Company List for Company Group: Marotta's Insurance Agency

	NAME	FID
<input type="button" value="Select"/>	Casualty	
<input type="button" value="Delete"/>		
<input type="button" value="Select"/>	Insurance Agency	
<input type="button" value="Delete"/>		

Reports (PMA Option Only)

reports
Lookup History Report

company

Lookup History Report

A PMA can review SSN lookups done by all his or her users.

When the Lookup History drop down option is selected the following option is displayed:

When all fields are completed, click the <Submit> button.

The screenshot shows the 'Lookup History Report' form with the following fields and callouts:

- User Name:** A text input field with a callout box: "Enter a valid User Name for your company that you want to review".
- Begin Date:** A date picker field with a callout box: "Enter the date you want the Lookup History Report to BEGIN".
- End Date:** A date picker field with a callout box: "Enter the date you want the Lookup History Report to END".
- Buttons:** 'Submit' and 'Cancel' buttons.

The box gives User Name and date range you submitted. Below this, a list of all lookups performed by the user for the specified date range.

The Lookups are arranged from Oldest to Newest lookup (Top to Bottom).

The screenshot shows the 'Lookup History Report' form with the following details:

- User Name:** insurancemaster
- Begin Date:** 5/1/2005
- End Date:** 5/18/2005
- Buttons:** 'Submit' and 'Cancel'
- Navigation:** <Previous [Next](#)>
- Filters:**
 - Personal Property Damage
- Results:**

5/4/05 9:09A	* Not on File *	Child Support	NoMatch
Mismatch?	* Not on File *	MassHealth	Pending
	* Not on File *	MassTax	NoMatch
- Footer Filter:** Personal Property Damage

Password Reset (PMA Only)

Note: The following instructions apply only when a PIP Master Administrator (PMA) has forgotten his or her password. PIP Payer Accounts (PPA's) must have their passwords reset by asking any PMA in their company. DOR will not reset PPA passwords.

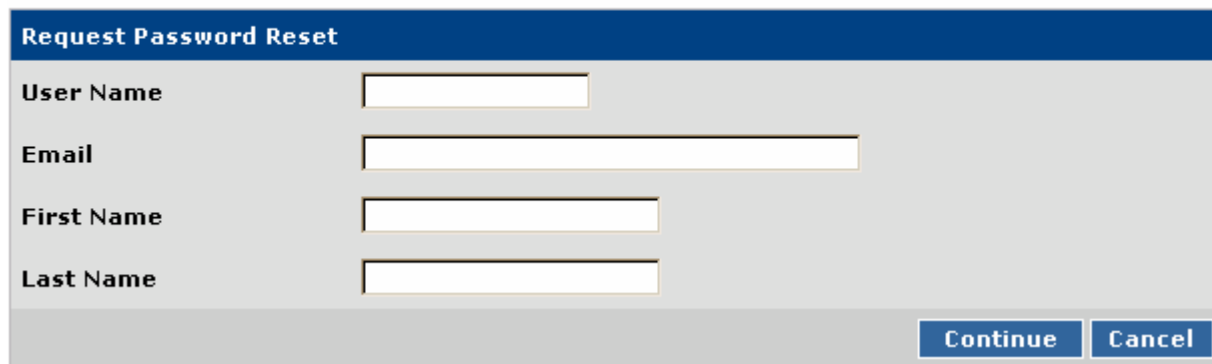
- **Organizations with more than one PMA:** Any active PMA within the company may reset the password of another PMA, as well as for any PPA.
- **Organizations with only one PMA:** DOR must reset the password for a PMA who is the only active PMA within a company. Use the "Forgot Password" link located on the PIP Login page to request your password reset.

Forgot Password Page

Once you enter your user name, e-mail address, first name and last name, click on the <Continue> button.

You will then be prompted to answer the Secret Question you chose as part of your company's original

If you forget your password, you must have it reset by Department of Revenue personnel. Use this form to request a password reset for a Master Account.



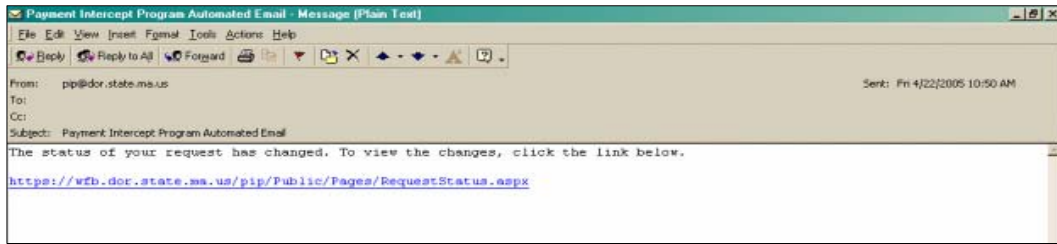
Request Password Reset	
User Name	<input type="text"/>
Email	<input type="text"/>
First Name	<input type="text"/>
Last Name	<input type="text"/>
<input type="button" value="Continue"/> <input type="button" value="Cancel"/>	

registration process. Type your secret answer. Then click on the <Submit> button.

After clicking the <Submit> button, the site will confirm your request was submitted and provide you with a reference number.

IMPORTANT: YOU MUST PRINT OUT THE "REQUEST SUBMITTED" PAGE BECAUSE YOU WILL NEED THE REFERENCE NUMBER TO ACCESS YOUR NEW PASSWORD.

Approval of PMA Password Resets: DOR must approve a “Forgot Password” request. Once your request is approved, you will receive an e-mail notifying you of a change in the status of your request.



- Enter your User Name and the Reference Number you received when you submitted your request
- Click the <Submit> button
- Confirming message “Your password has been reset....” and a **temporary password** that you will need to continue. Make sure to write down the temporary password.
 - **Note:** If your request for a password reset was denied, the message will state this. You will need to contact DOR to discuss the reasons for the denial.
- Click the <Ok> button.
- Site will direct you to the PIP Login page.
- Enter your existing User name.
- Enter the temporary password provided.
- Click the <Log in> button.
 - Enter your new 8-15 character password
 - Click the <Save> button.

New Organization Registration

This on-line registration process is used only for those organizations that are not currently registered to use the PIP site. Registration is not immediate and must go through an approval process by DOR.

Users must complete all mandatory fields and will get an error message if a required field is not completed.

The only non-mandatory fields are the Federal ID number, 2nd address line and the additional 4 digits for the enhanced Zip Code.

User Information: The user who is submitting the registration form will be designated as the PIP Master Administrator (PMA) for this company, organization or retirement board.

After completing the on-line registration form, you must read through the “Terms of Use” before you can submit your registration request. To accept the terms of use, check the “I Agree” check box at the end of the of agreement.

Clicking the <Submit> button will submit your registration request for review.

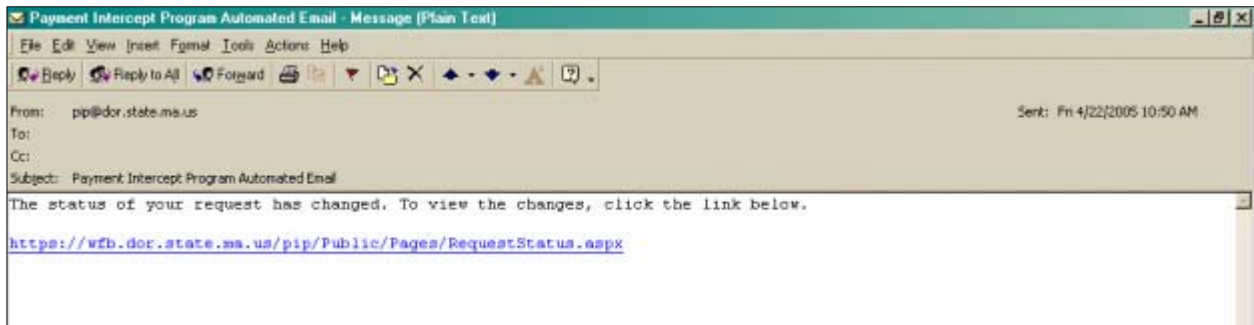
IMPORTANT: YOU MUST PRINT OUT THE “REQUEST SUBMITTED” PAGE BECAUSE YOU WILL NEED THE REFERENCE NUMBER TO ACCESS YOUR PASSWORD TO COMPLETE THE REGISTRATION PROCESS.

Company Information	
Company Name*	<input type="text"/>
Federal ID Number	<input type="text"/>
Company Fax*	<input type="text"/>
Address*	<input type="text"/> <input type="text"/>
City*	<input type="text"/>
State* / Zip Code*	MA <input type="text"/> - <input type="text"/>

User Information	
First Name*	<input type="text"/>
Last Name*	<input type="text"/>
Title*	<input type="text"/>
Email*	<input type="text"/>
Secret Question*	Mother's maiden name <input type="text"/> <small>(in case you lose your user name or password)</small>
Secret Answer*	<input type="text"/>
Phone Number*	<input type="text"/> ext. <input type="text"/>
Requested User Name*	<input type="text"/> <small>(at least 3 characters)</small>
Requested Password*	<input type="text"/> <small>(8-15 characters, with at least 1 upper case and 1 lower case letter, and 1 digit)</small>
Category*	NOT_SET <input type="text"/>

Registration Approval

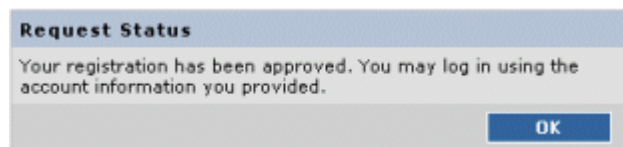
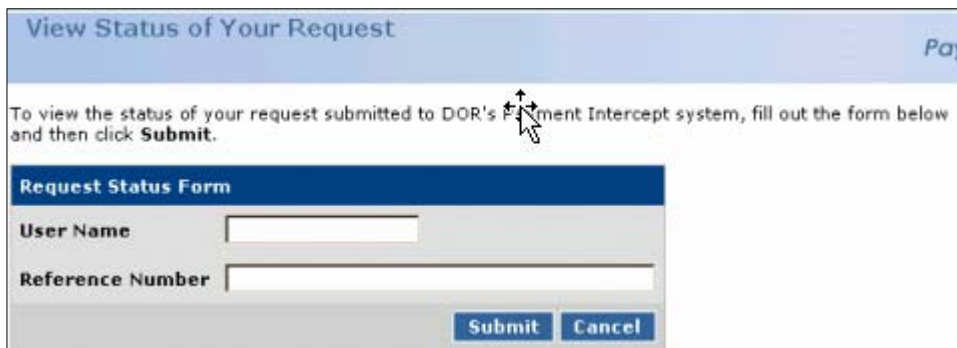
After your on-line registration application is approved by DOR, you will receive an automated email message informing you the status of your request has changed. The email similar to the one below, will direct you to view the status of your request. Clicking the provided link will direct you to the status of your request.



The link will direct you to enter your user name and the reference number provided to you at the completion of your registration request. Click the <Submit> button.

If you enter the correct user name and reference number, the “View Status of Your Request” page will appear. Clicking the <OK> button will direct you to the Request Status page.

Clicking the <OK> button will direct you to the PIP Login page.



If you do not enter the correct user name and reference number, you will receive a specific error message directing you as to what needs to be corrected.

Priority of Payments

Insurance Companies

- **Funds must be disbursed by Insurance companies in the following priority:**
 1. Any party who has provided or will provide a documented benefit or service in connection with the insurance claim, such as attorneys, repair shops and health care providers, **including MassHealth**.
 2. DOR's Child Support Enforcement Division (up to the amount of the child support lien).
 3. DOR's Taxpayer Services Division (up to the amount of the tax lien).
 4. Any holder of a lien not arising from benefits or services related to the insurance claim.
 5. The claimant or beneficiary.

Retirement Boards

- **Funds must be disbursed by Retirement Boards in the following priority:**
 1. Federal and state tax withholding required by law.
 2. DOR's Child Support Enforcement Division (up to the amount of the child support lien).
 3. The retirement board member.

Routing of Payments

Directly to Agency

If there are one or more liens against the claimant's insurance settlement, the insurance company must determine the proper distribution of funds, according to the priorities of payment listed above and send separate payments in full or partial satisfaction of the MassHealth, Child Support or MassTax liens to:

- **MassHealth:** Commonwealth of Mass., P.O. Box 15205, Worcester, MA 01615-0205
- **Child Support:** DOR/CSE - Lockbox, P.O. Box 55149, Boston, MA 02205-5149
- **MassTax:** DOR/TSD, P.O. Box 7021, Boston, MA 02204

Note: When sending a check directly to the agency, you should:

- ✓ Make the check payable only to the Commonwealth of Massachusetts
- ✓ Include the Social Security number of the claimant, beneficiary or retirement member on the check, and,
- ✓ Include a copy of the Notice of Lien and Levy with the check.

Payments through Claimants Attorney

If an insurance company is unable to determine the proper distribution of funds, you may send the payment to the claimant's attorney but must follow these instructions:

- You must provide the claimant's attorney with a copy of the Notice of Lien and Levy and Notice to Attorney to inform the attorney of his or her legal obligation to distribute funds to DOR.
- If there is a MassHealth lien, you must list the Commonwealth of Massachusetts as a payee on the settlement check. The claimant's attorney must contact MassHealth for instructions on how the check should be endorsed.
- If there is no MassHealth lien but there is a Child Support or MassTax lien, you should not include the Commonwealth as a payee on the settlement check you send to the attorney.

NOTE: Failure to follow of these steps may make your company liable for any payments DOR or MassHealth does not collect because of your error.

Agency Information

Child Support

Payments:

DOR/CSE – Lockbox
PO Box 55149
Boston, MA 02205-5149

Correspondence:

DOR/CSE
PO Box 9560
Boston, MA 02114-9560
Attn: Payment Intercept Program

Contact Information:

Email: pdustaff@dor.state.ma.us
Phone: 617-626-4154
Fax: 617-626-4009

DOR/TAX

Payments:

Taxpayer Services Division
PO Box 7021
Boston, MA 02204-7021
Attn: Insurance Payment Intercept

Correspondence:

DOR/TSD
PO Box 7021
Boston, MA 02204-7021
Attn: Insurance Payment Intercept

Contact Information:

Email: mdorcollections@dor.state.ma.us
Phone: 617-887-6400
Fax: 617-887-6599

MassHealth

Payments:

MassHealth Recovery Unit
PO Box 15205
Worcester, MA 01615-0205

Correspondence:

MassHealth Recovery Unit
PO Box 15205
Worcester, MA 01615-0205
Attn: Payment Intercept Program

Contact Information:

Email: masshealthcasualtyrecovery@umassmed.edu
Phone: 800-754-1864
Fax: 508-856-7672