Massachusetts

Payment Intercept Program

Department of Revenue

PIPE

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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## HOME PAGE

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</tbody>
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## MENU BAR

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<td></td>
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</tr>
</tbody>
</table>

### ACCOUNT MANAGEMENT OPTIONS

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</thead>
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<tbody>
<tr>
<td></td>
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</tr>
</tbody>
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<tr>
<th></th>
<th></th>
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</thead>
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<td></td>
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**Log In Page**

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.
## Menu Bar

<table>
<thead>
<tr>
<th>home</th>
<th>lookup</th>
<th>account management</th>
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<td>Your lookup history</td>
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<td></td>
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<td></td>
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<td></td>
</tr>
</tbody>
</table>

### Menu Option Descriptions

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

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.

**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.
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.

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 instantly 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.
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**

<table>
<thead>
<tr>
<th>5/9/05 8:42A</th>
<th>Personal Property Damage</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Mismatch?</td>
<td>* Not on File *</td>
<td>Child Support</td>
</tr>
<tr>
<td></td>
<td>* Not on File *</td>
<td>MassHealth</td>
</tr>
<tr>
<td></td>
<td>* Not on File *</td>
<td>MassTax</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>3/30/05 11:54A</th>
<th>Personal Property Damage</th>
<th>Documents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mismatch?</td>
<td>ROBERT JONES</td>
<td>Child Support</td>
</tr>
<tr>
<td></td>
<td>* Not on File *</td>
<td>MassHealth</td>
</tr>
<tr>
<td></td>
<td>TIMOTHY SHURICK</td>
<td>MassTax</td>
</tr>
</tbody>
</table>
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.

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.

**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.
  - **Example:**
    - Personal Property Damage or Life Insurance check box is shaded
    - Result: NoMatch replaces Action Required

- 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.

- **Note**: If the Date of Accident DOES NOT MATCH the MassHealth Eligibility Dates, “Action Required” will instantaneously change to “No Match.”
- **Note**: If the Date of Accident MATCHES the MassHealth Eligibility Date, you will be required to enter more information about the claim.

**MassHealth Information**

**Date of Accident**
The settlement amount entered below must be the **actual** dollar amount.

**Total Settlement Amount**

Enter Total Settlement Amount

[Use calendar button to enter Accident Date]
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?**
- [ ] Yes
- [x] No

**Attorney Information**

**Attorney Name**
[Name]

**Address**
[Address]

**City**
[City]

**State / Zip Code**
[MA] [____] [____]

**Attorney Phone**
[Phone]

**MassHealth Information**

**Type of Accident**
[Type]

**Type of Injury Sustained**
- [ ] Abdomen
- [ ] Emotional
- [ ] Knee
- [ ] Ankle
- [ ] Facial
- [ ] Leg
- [ ] Arm
- [ ] Fingers
- [ ] Neck
- [ ] Back
- [ ] Foot
- [ ] Ribs
- [ ] Buttocks
- [ ] Hand
- [ ] Shoulder
- [ ] Chest
- [ ] Head
- [ ] Wrist
- [ ] Elbow
- [ ] Hip
- [ ] Other

[Save] [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.
**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.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Attorney Involved?</strong></td>
<td>Button Default is <strong>YES</strong>. If claimant has no attorney, click <strong>NO</strong>.</td>
</tr>
<tr>
<td><strong>Total Amount Due</strong></td>
<td>Auto-filled by PIP. Represents total owed to all agencies that are exerting liens.</td>
</tr>
<tr>
<td><strong>Total Settlement Amt</strong></td>
<td>Enter the gross settlement, policy or refund payout, without any deductions.</td>
</tr>
</tbody>
</table>

**Attorney Information** (If “NO” is clicked at top of page, all fields will be shaded)

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Attorney Name</strong></td>
<td>Enter firm or attorney name.</td>
</tr>
<tr>
<td><strong>Address</strong></td>
<td>Enter street address or post office box.</td>
</tr>
<tr>
<td><strong>City</strong></td>
<td>Enter city or town.</td>
</tr>
<tr>
<td><strong>State / Zip</strong></td>
<td>Select state from listing then enter the Zip Code. If known, also enter the Zip + 4 value.</td>
</tr>
<tr>
<td><strong>Attorney Phone</strong></td>
<td>Enter phone number, beginning with area code.</td>
</tr>
</tbody>
</table>

**Claimant Information**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Social Security Number</strong></td>
<td>Auto-filled by PIP.</td>
</tr>
<tr>
<td><strong>Address</strong></td>
<td>Enter the claimant’s street address.</td>
</tr>
<tr>
<td><strong>City</strong></td>
<td>Enter city or town.</td>
</tr>
<tr>
<td><strong>State / Zip</strong></td>
<td>Select state from listing then enter the Zip Code. If known, also enter the Zip + 4 value.</td>
</tr>
<tr>
<td><strong>Claim No</strong></td>
<td>Enter claim or policy number. If none, enter N/A.</td>
</tr>
</tbody>
</table>
2 Agencies Matched
This is an example of a 2-agency match.

<table>
<thead>
<tr>
<th>Date</th>
<th>SSN</th>
<th>Agency</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>3/30/05</td>
<td>ROBERT JONES</td>
<td>Child Support</td>
<td>Match</td>
</tr>
<tr>
<td>3/30/05</td>
<td>* Not on File *</td>
<td>MassHealth</td>
<td>NoMatch</td>
</tr>
<tr>
<td>3/30/05</td>
<td>ROBERT JONES</td>
<td>MassTax</td>
<td>Match</td>
</tr>
</tbody>
</table>

Mismatch?

3 Agencies Matched
This is an example of a 3-agency match.

<table>
<thead>
<tr>
<th>Date</th>
<th>SSN</th>
<th>Agency</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>5/11/05</td>
<td>LISA SULLIVAN</td>
<td>Child Support</td>
<td>Match</td>
</tr>
<tr>
<td>5/11/05</td>
<td>LISA SULLIVAN</td>
<td>MassHealth</td>
<td>Match</td>
</tr>
<tr>
<td>5/11/05</td>
<td>LISA SULLIVAN</td>
<td>MassTax</td>
<td>Match</td>
</tr>
</tbody>
</table>

Mismatch?

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 the 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.

<table>
<thead>
<tr>
<th>Date</th>
<th>Time</th>
<th>Mismatch?</th>
<th>Status</th>
<th>Type</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>3/30/05</td>
<td>12:19P</td>
<td></td>
<td>Child Support</td>
<td>NoMatch</td>
<td></td>
</tr>
<tr>
<td>John Smith</td>
<td>* Not on File</td>
<td>MassHealth</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**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.

<table>
<thead>
<tr>
<th>Date</th>
<th>Time</th>
<th>Mismatch?</th>
<th>Status</th>
<th>Type</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>5/27/05</td>
<td>10:14P</td>
<td></td>
<td>Pending</td>
<td>MassSupport</td>
<td>MassHealth</td>
</tr>
<tr>
<td>MARIO MARTINEZ</td>
<td>* Not on File</td>
<td>MassTax</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>MARIO MARTINEZ</td>
<td></td>
<td></td>
<td>Pending</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
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.

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.
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.

The status of one of your lookups has changed. To view the changes, click the link below.


Documents

<table>
<thead>
<tr>
<th>2/9/05 9:08A</th>
<th>* Not on File *</th>
<th>Child Support</th>
<th>NoMatch</th>
</tr>
</thead>
<tbody>
<tr>
<td>John Smith</td>
<td>MassHealth</td>
<td></td>
<td>Action Required</td>
</tr>
<tr>
<td>* Not on File *</td>
<td>MassTax</td>
<td></td>
<td>NoMatch</td>
</tr>
</tbody>
</table>
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.

<table>
<thead>
<tr>
<th>Field</th>
<th>Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attorney Involved?*</td>
<td>Yes, No</td>
</tr>
<tr>
<td>Total Amount Due</td>
<td></td>
</tr>
<tr>
<td>Total Settlement Amount*</td>
<td></td>
</tr>
<tr>
<td><strong>Attorney Information</strong></td>
<td></td>
</tr>
<tr>
<td>Attorney Name*</td>
<td></td>
</tr>
<tr>
<td>Address*</td>
<td></td>
</tr>
<tr>
<td>City*</td>
<td></td>
</tr>
<tr>
<td>State* / Zip Code*</td>
<td>MA,</td>
</tr>
<tr>
<td>Attorney Phone*</td>
<td></td>
</tr>
<tr>
<td><strong>Claimant Information</strong></td>
<td></td>
</tr>
<tr>
<td>Social Security Number</td>
<td></td>
</tr>
<tr>
<td>Address*</td>
<td></td>
</tr>
<tr>
<td>City*</td>
<td></td>
</tr>
<tr>
<td>State* / Zip Code*</td>
<td>MA,</td>
</tr>
<tr>
<td><strong>Insurance Information</strong></td>
<td></td>
</tr>
<tr>
<td>Claim No*</td>
<td></td>
</tr>
</tbody>
</table>

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.
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

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

Save  Cancel  Deactivate My Account
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.
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.

View User Details Page

Assure user has entered their correct email address

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

  ![Confirm Account Deactivation Dialog]

  By deactivating this account, the given user will not be able to login.

  Are you sure?

  Deactivate  Cancel

  - 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

User Profile

⚠️ The account has been deactivated.

Date Deactivated
08/02/2005 11:46:23

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.

  ![Confirm Account Reactivation Dialog]

  By reacting this account, the given user will be able to login.

  Are you sure?

  Reactivate  Cancel

  - 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

User Profile

⚠️ The account has been reactivated.
**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.

---

### Create User

Account Management > View Users > Create User

**Create New User In Company Group: Marotta's Insurance Agency**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Name</td>
<td>Enter New User’s First Name</td>
</tr>
<tr>
<td>Last Name</td>
<td>Enter New Users Last Name</td>
</tr>
<tr>
<td>User Name</td>
<td></td>
</tr>
<tr>
<td>Role</td>
<td>Select the Role you want the User to play</td>
</tr>
<tr>
<td>Temporary Password</td>
<td>(NOT SET)                      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 - murphyr</td>
</tr>
</tbody>
</table>

**Temporary Password:** Is generated by the site. The Temp Password will appear after the <Save> button is clicked.
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.

- 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
Reports (PMA Option Only)

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 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).
**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 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.

<table>
<thead>
<tr>
<th>Request Password Reset</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>User Name</strong></td>
</tr>
<tr>
<td><strong>Email</strong></td>
</tr>
<tr>
<td><strong>First Name</strong></td>
</tr>
<tr>
<td><strong>Last Name</strong></td>
</tr>
</tbody>
</table>

**Continue**  **Cancel**
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.
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 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