Workers' Compensation Attestation Enhancement Webinar for Corporate Users and Professional Administrators

November 6, 2019

Presentation Topics

- Background Information
- Purpose of Enhancement
- Registering as a Professional Administrator
- Functionality for a Professional Administrator
- Change for Corporate Users
- Resources

Background Information

- Each year, no later than 30 days after the anniversary date of the Workers' Compensation settlement, an attestation must be sent to Medicare's Benefits Coordination & Recovery Center (BCRC) stating that the funds in the account were used correctly.
- In the past, transactions regarding Workers' Compensation Medicare Set-Aside accounts, including annual attestations, had to be completed using U.S. Mail.

Purpose of Enhancement

- To allow Professional Administrators (PAs) to create a Workers' Compensation Medicare Set-Aside account in order to:
  - Upload account transaction files for WCMSAs they administer
  - Download response files for each submitted file
  - Reconcile WCMSA balances with current balance stored on the WCMSAP
  - Eliminate the need to use U.S. Mail, but mailing is still an option if preferred

Registering as a Professional Administrator

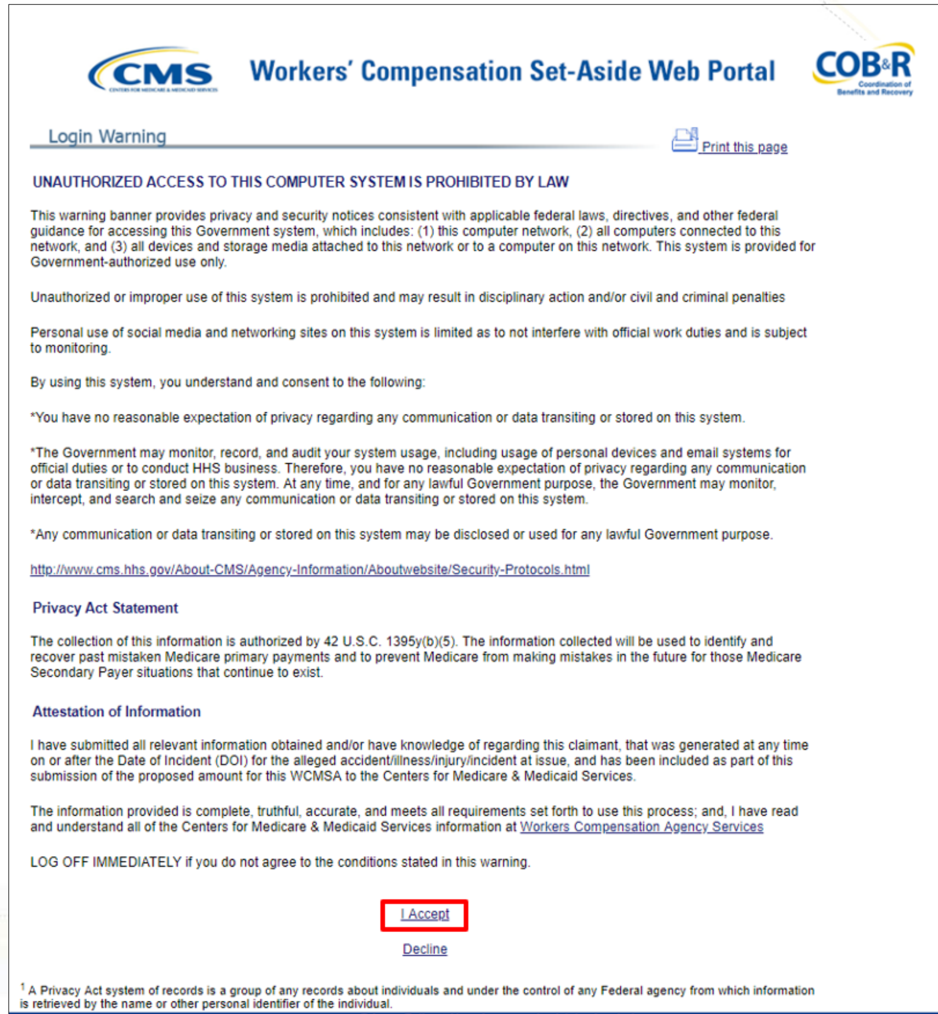
- In order to use the WCMSAP, Professional Administrators will be required to complete a two-step process:
  - Step one: Registration
  - Step two: Account Setup
  - Registration will be completed by the Account Representative (AR)
  - Account Setup will be performed by the Account Manager (AM)
  - AM will control the administration of the PA Account

Registering as a Professional Administrator (2)

- Entities who wish to utilize the WCMSAP as a Professional Administrator are required to create a new WCMSAP account.
- After account setup, the AM or AD for the account can request case access for each case they have authority to administer and are required to provide the current/opening balance for all existing WCMSAs they want to administer on the WCMSAP before transaction records will be accepted for the case.
  - Note: Professional Administrators will only need to provide the opening balance for cases that were set up prior to this enhancement.

Login Warning Page

- Click “I Accept” to continue to the Welcome Page.



Workers’ Compensation Set-Aside Web Portal

Login Warning

Print this page

UNAUTHORIZED ACCESS TO THIS COMPUTER SYSTEM IS PROHIBITED BY LAW

This warning banner provides privacy and security notices consistent with applicable federal laws, directives, and other federal guidance for accessing this Government system, which includes: (1) this computer network, (2) all computers connected to this network, and (3) all devices and storage media attached to this network or to a computer on this network. This system is provided for Government-authorized use only.

Unauthorized or improper use of this system is prohibited and may result in disciplinary action and/or civil and criminal penalties

Personal use of social media and networking sites on this system is limited as to not interfere with official work duties and is subject to monitoring.

By using this system, you understand and consent to the following:

*You have no reasonable expectation of privacy regarding any communication or data transiting or stored on this system.

*The Government may monitor, record, and audit your system usage, including usage of personal devices and email systems for official duties or to conduct HHS business. Therefore, you have no reasonable expectation of privacy regarding any communication or data transiting or stored on this system. At any time, and for any lawful Government purpose, the Government may monitor, intercept, and search and seize any communication or data transiting or stored on this system.

*Any communication or data transiting or stored on this system may be disclosed or used for any lawful Government purpose.

http://www.cms.hhs.gov/About-CMS/Agency-Information/Aboutwebsite/Security-Protocols.html

Privacy Act Statement

The collection of this information is authorized by 42 U.S.C. 1395y(b)(5). The information collected will be used to identify and recover past mistaken Medicare primary payments and to prevent Medicare from making mistakes in the future for those Medicare Secondary Payer situations that continue to exist.

Attestation of Information

I have submitted all relevant information obtained and/or have knowledge of regarding this claimant, that was generated at any time on or after the Date of Incident (DOI) for the alleged accident/illness/injury/incident at issue, and has been included as part of this submission of the proposed amount for this WCMSA to the Centers for Medicare & Medicaid Services.

The information provided is complete, truthful, accurate, and meets all requirements set forth to use this process; and, I have read and understand all of the Centers for Medicare & Medicaid Services information at Workers Compensation Agency Services

LOG OFF IMMEDIATELY if you do not agree to the conditions stated in this warning.

I Accept

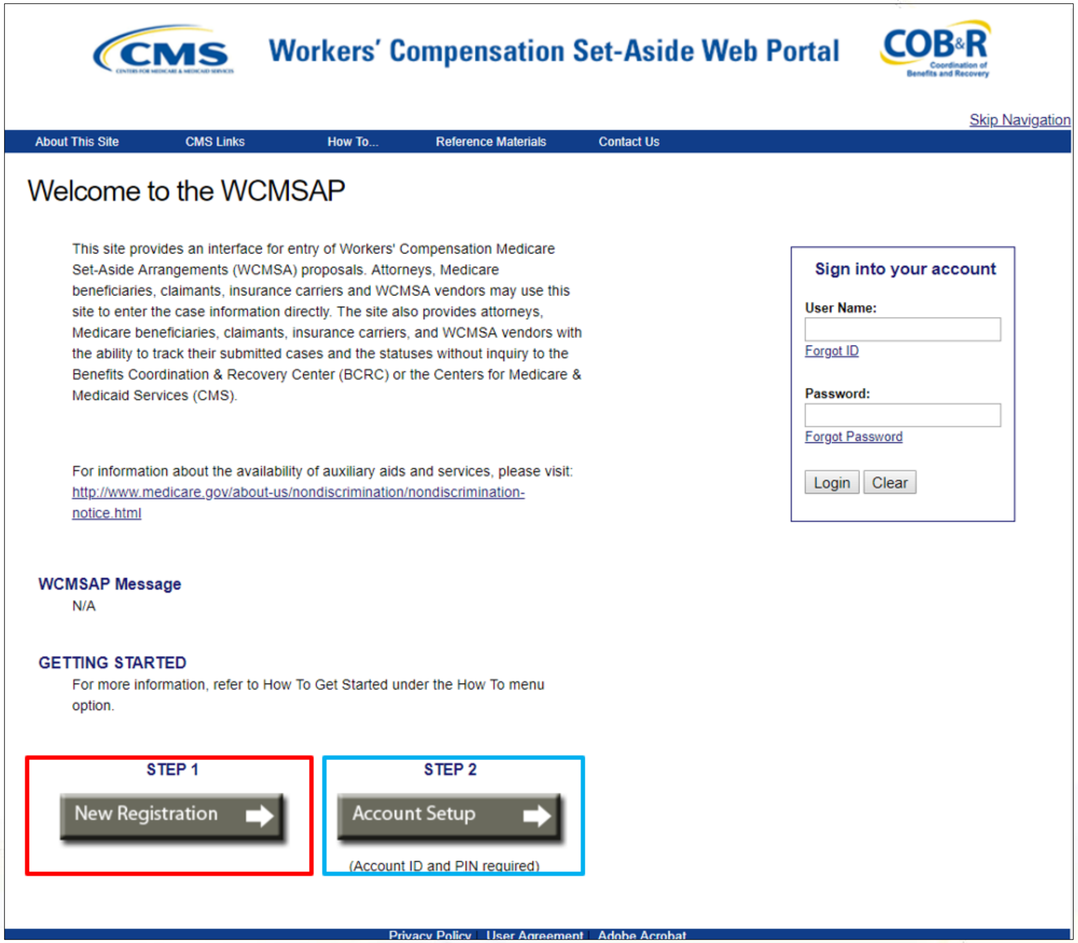
Decline

[1] A Privacy Act system of records is a group of any records about individuals and under the control of any Federal agency from which information is retrieved by the name or other personal identifier of the individual.

Privacy Policy | User Agreement | Adobe Acrobat

Welcome to WCMSAP

- Click the New Registration link to get started registering for your Professional Administrator account.
- User will return to this page to login once account setup is completed.
- Note: Registering for an account is a two-step process, the user will come back to complete Step 2.



Select Account Type

Workers' Compensation Set-Aside Web Portal

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

Select Account Type

QUICK HELP

Help About This Page

Please select the type of account for which you are registering:

Corporate

A corporate account type indicates that the submitter is registering as a corporate entity with an Employer Identification Number (EIN) and will be regularly submitting WCMSA requests.

Representative

A representative account type is for non-corporate WCSA submitters. These submitters do not have an EIN, but will be submitting multiple cases.

Self

Self submitters are Medicare beneficiaries or future Medicare beneficiaries (claimant) submitting a case on their own behalf. The registrant must be a Medicare beneficiary or claimant and may only submit cases for themselves.

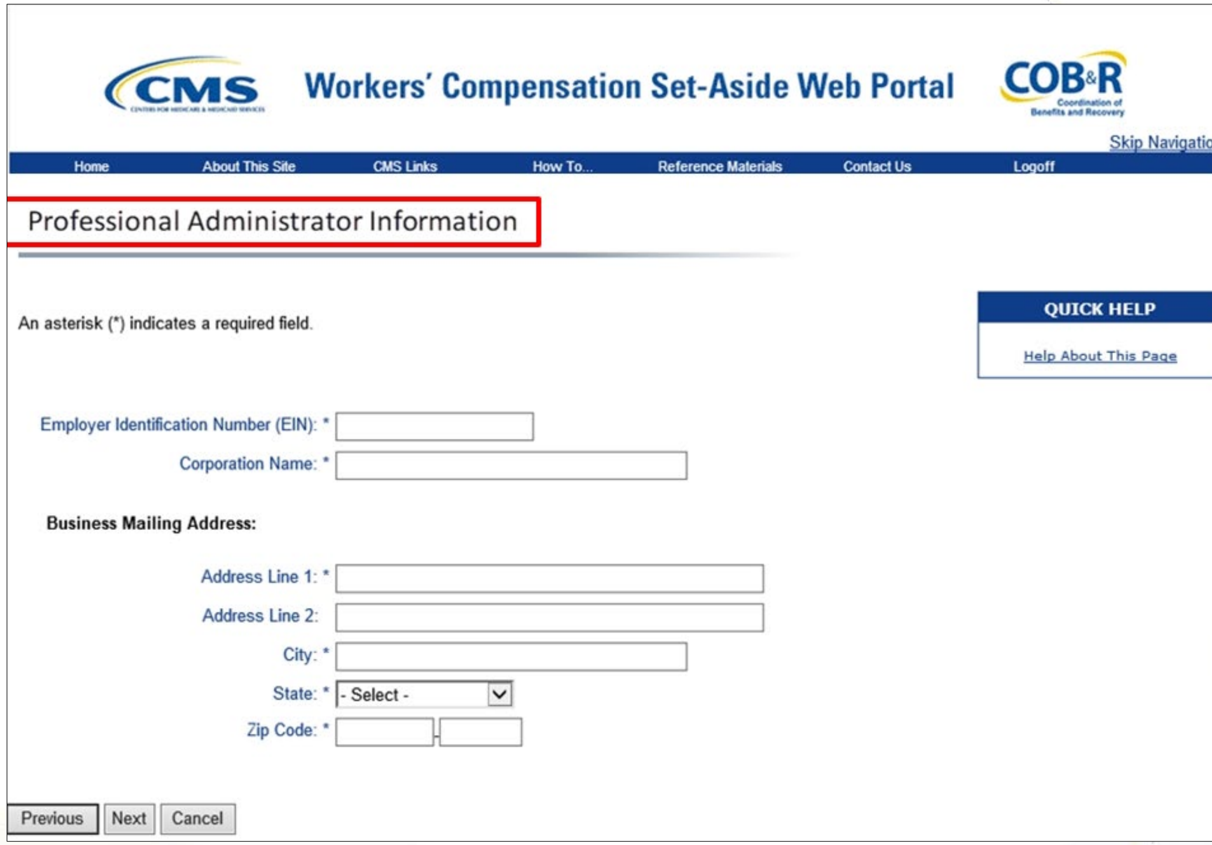
Professional Administrator

A professional administrator account type indicates that the entity is registering with an Employer Identification Number (EIN) and will be the responsible party fo administering MSA funds and reporting to Medicare.

Previous | Next

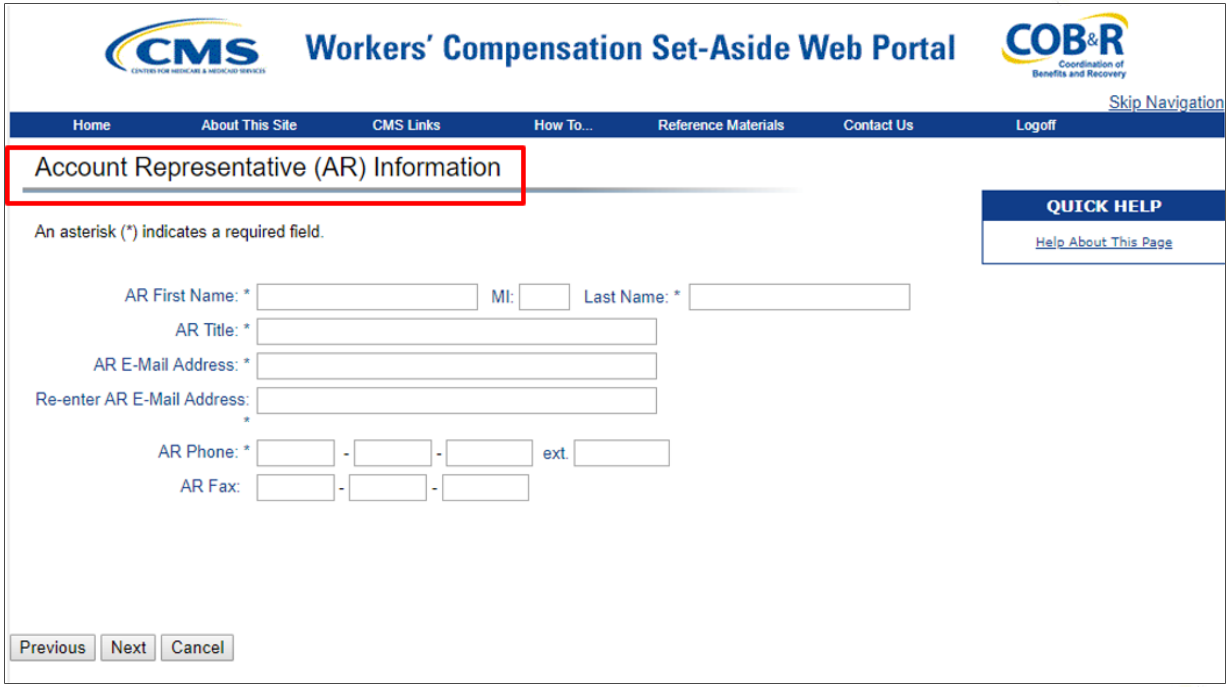
Professional Administrator Information

- All information with an asterisk (*) is a required field.
- Click Next to continue.



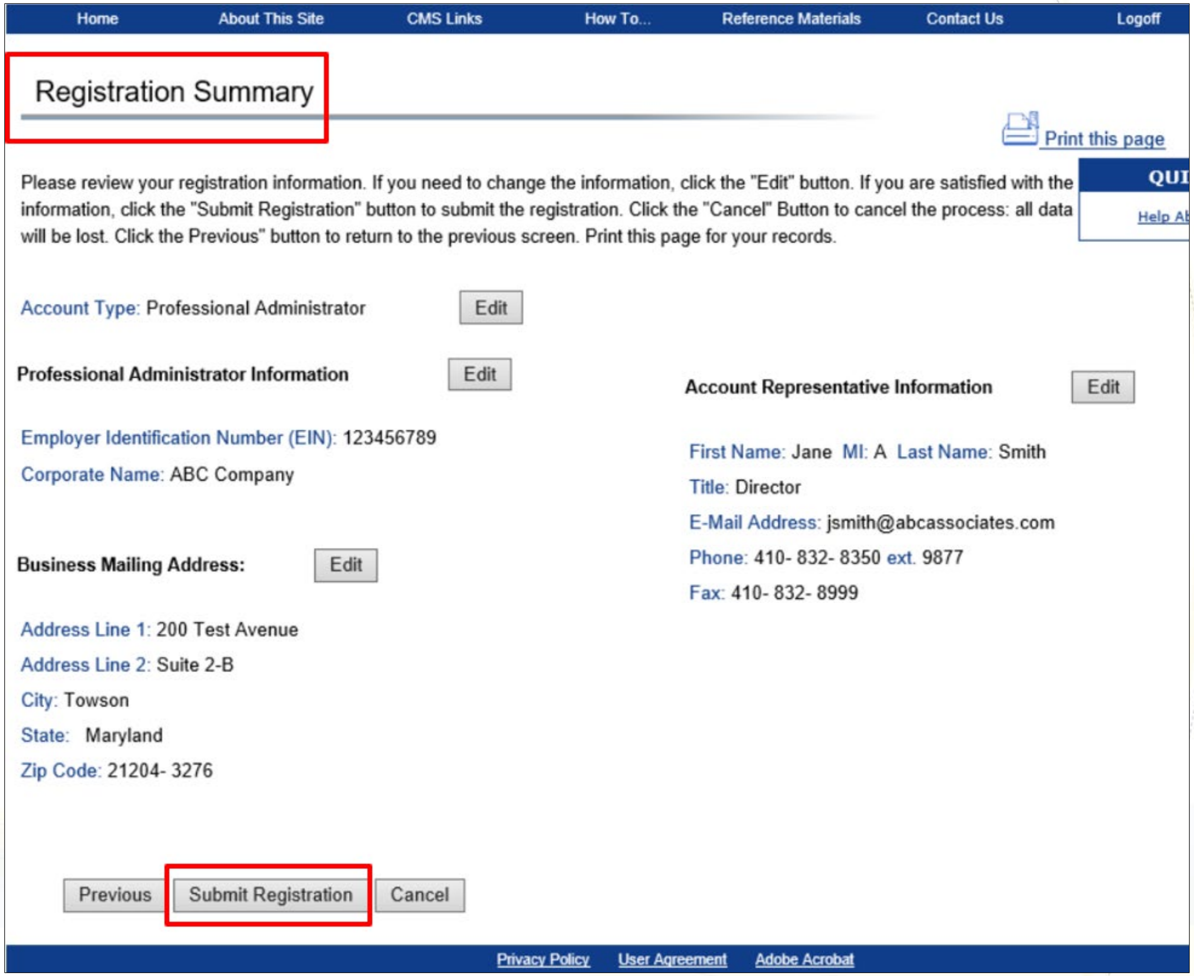
Account Representative (AR) Information

- All information with an asterisk (*) indicates a required field.
- Click Next to continue.



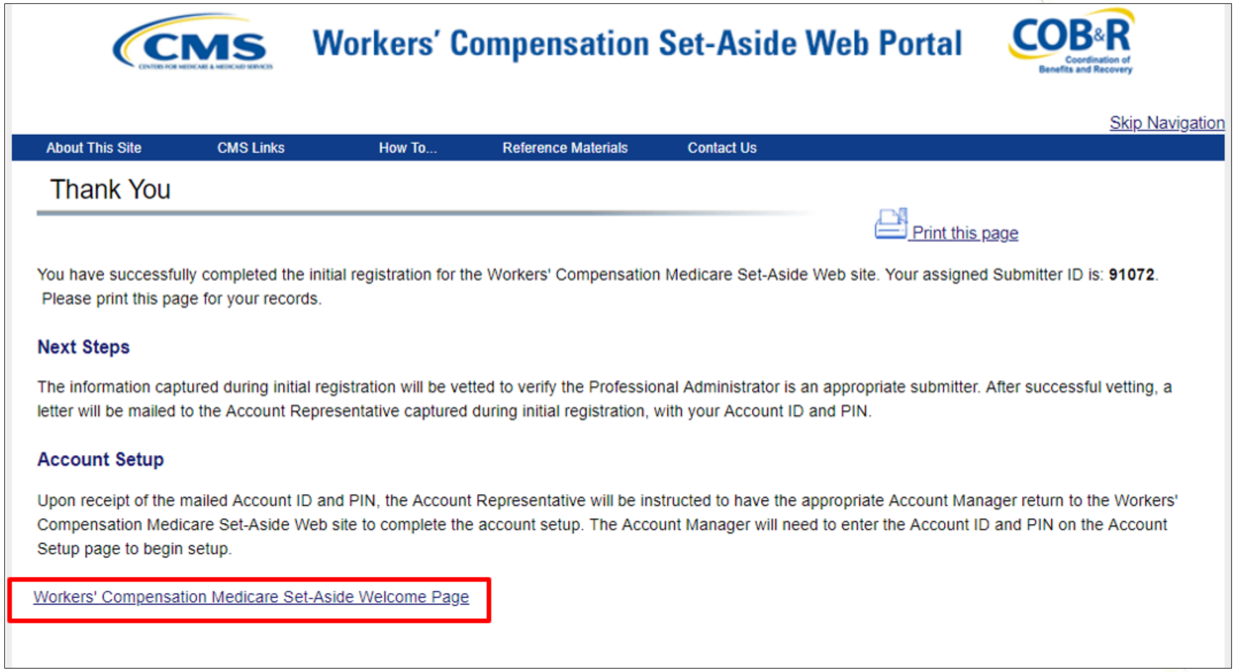
Registration Summary

- Review all information previously entered.
- Click Edit next to each section to make any corrections.
- Click Submit Registration.



Thank You

- You have successfully completed registration.
- Your information will need to be vetted to verify you are an appropriate submitter.
- The Account Representative will receive a letter with your Account ID and PIN.
- The AR will use this information to complete your account setup.



Functions of a Professional Administrator

COB&R Coordination of Benefits and Recovery

WCMSAP Account List

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Skip Navigation

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

WCMSAP Account List

Corporate and Representative Accounts

The WCMSAP provides an interface for entry of Workers' Compensation Medicare Set-Aside (WCMSA) proposals. You may use this site to enter the case information directly. The site also provides the ability to track submitted cases and the statuses without inquiry to the BCRC or CMS.

If the account is a Representative account, you also have the ability to view information for your WCMSA(s) and submit an annual attestation via the WCMSAP for all WCMSAs where you are the identified administrator.

Professional Administrator Accounts

The WCMSAP provides an interface for you to view summary information for WCMSA cases you administer by utilizing the Case Lookup function. You can also upload account transaction files and receive corresponding response files for the WCMSAs you administer.

Click the desired Account ID link below to access the specific account and perform these functions. You may modify your personal account settings by clicking the appropriate link under the Account Settings list.

Associated Account IDs:

12345 - Corporate

11111 - Representative

22222 – Professional Administrator

QUICK HELP

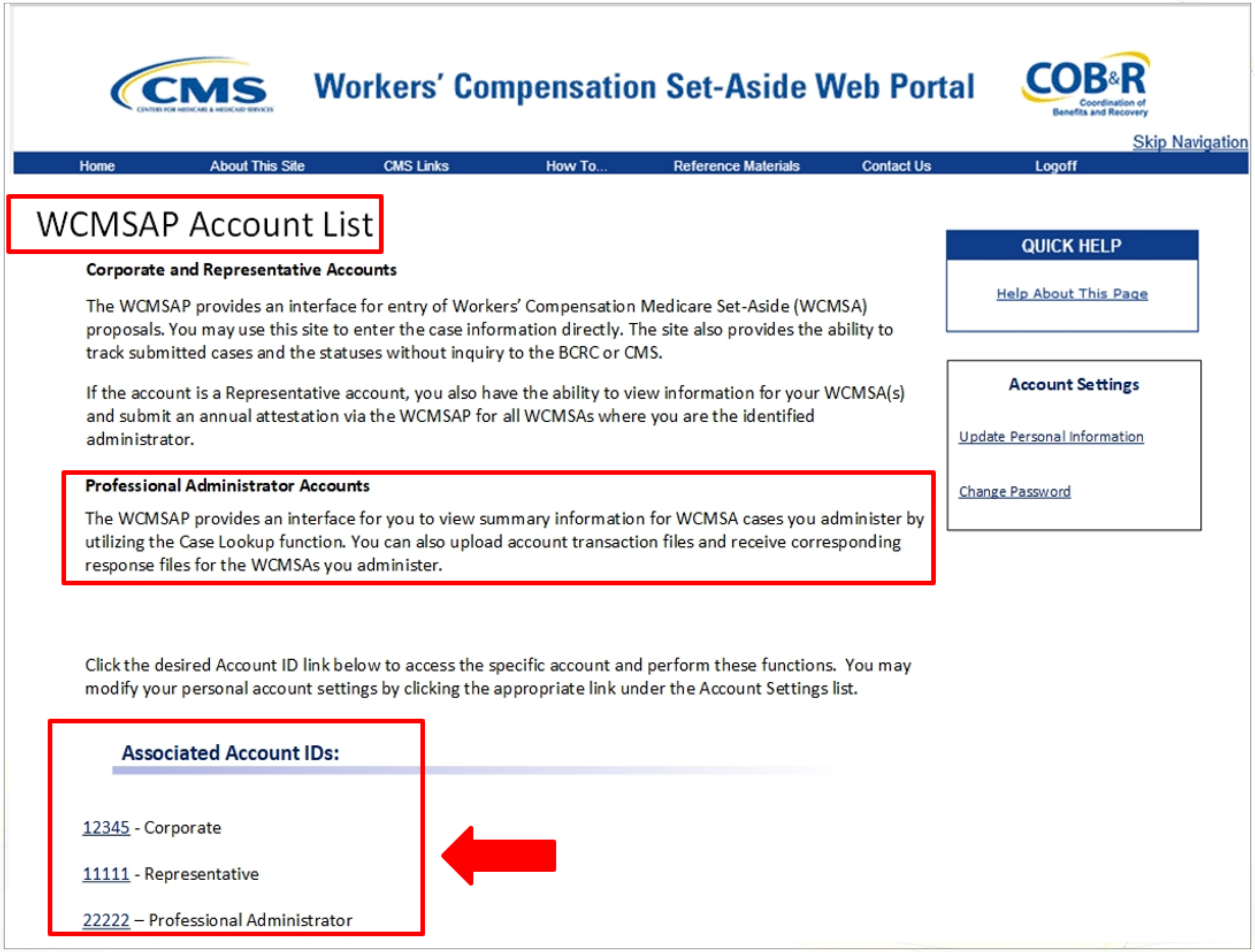
Help About This Page

Account Settings

Update Personal Information

Change Password

WCMSAP Account List (2)



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Skip Navigation

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

WCMSAP Account List

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QUICK HELP

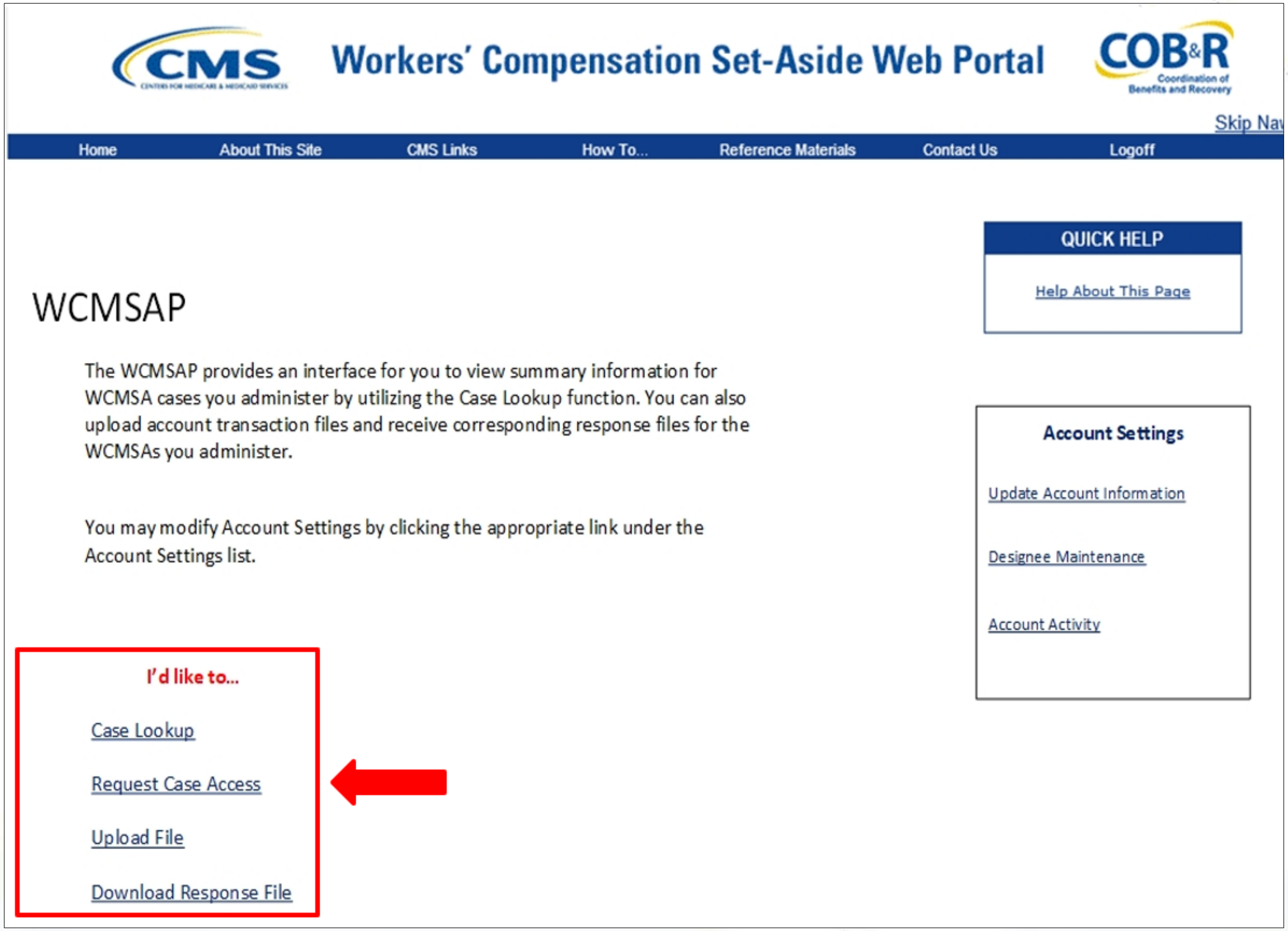
Help About This Page

Account Settings

Update Personal Information

Change Password

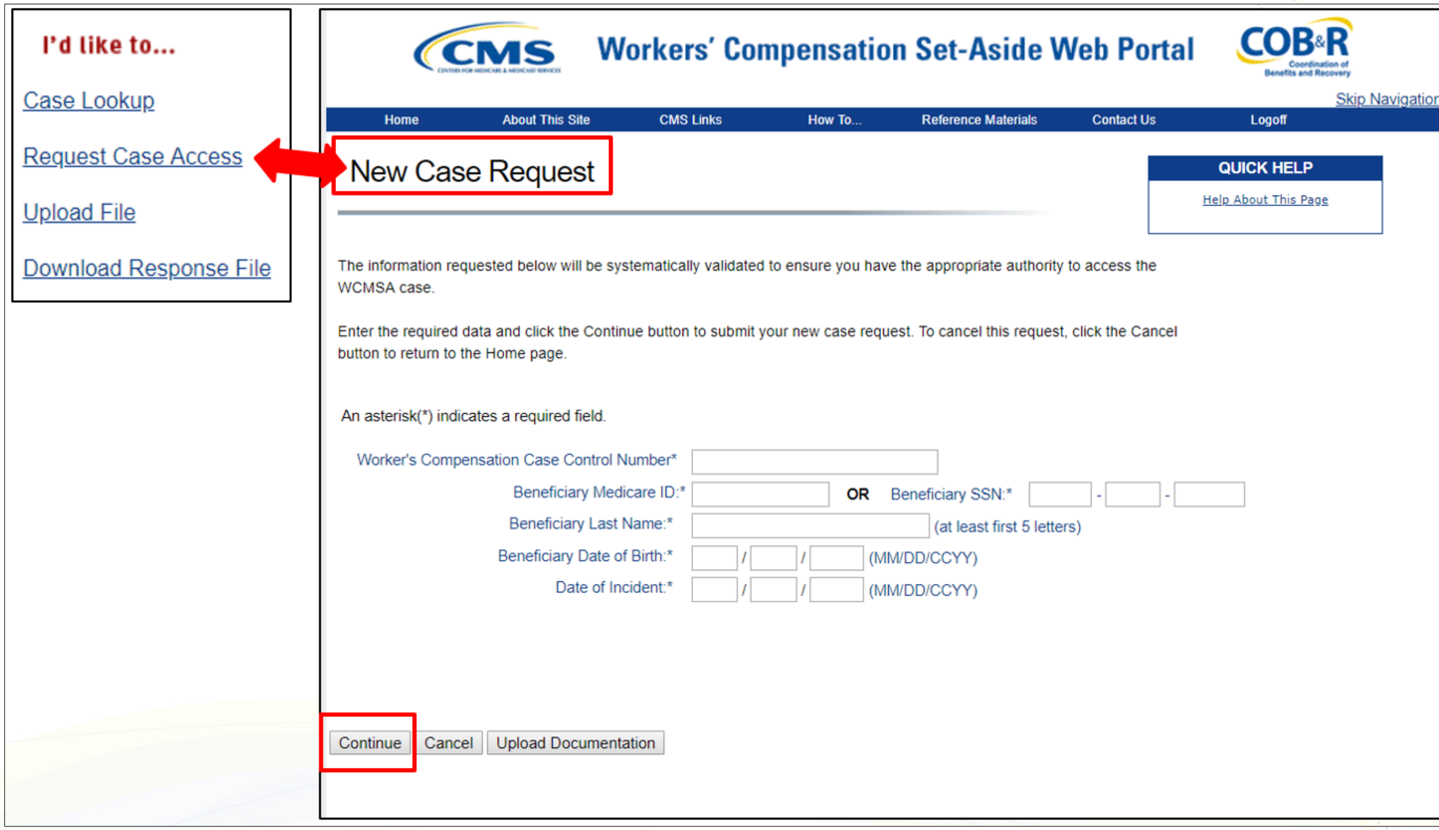
WCMSAP Home Page



New Case Request

New Case Request Options:

- Associate cases to your Login ID
- Upload Settlement Documents for approved cases



New Case Request Confirmation

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Skip Navigation

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

New Case Request Confirmation

QUICK HELP

Help About This Page

You have successfully associated the case listed below to your account. Summary information for this case can now be viewed. Click Continue to return to the New Case Request page.

Worker's Compensation Case Control Number: WC1234567890113

Beneficiary Medicare ID: 123456A121

Beneficiary Last Name: Smith

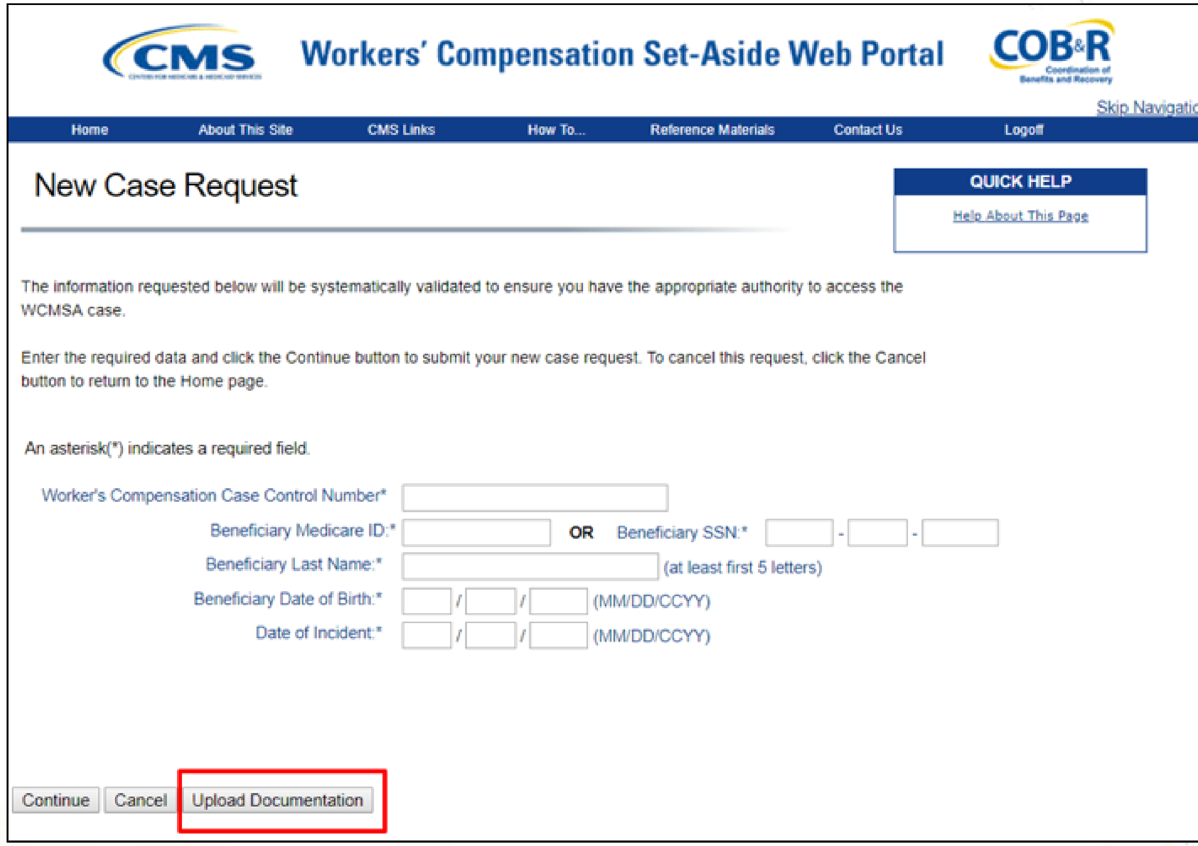
Beneficiary Date of Birth: 11/12/1978

Date of Incident: 11/01/2001

Continue

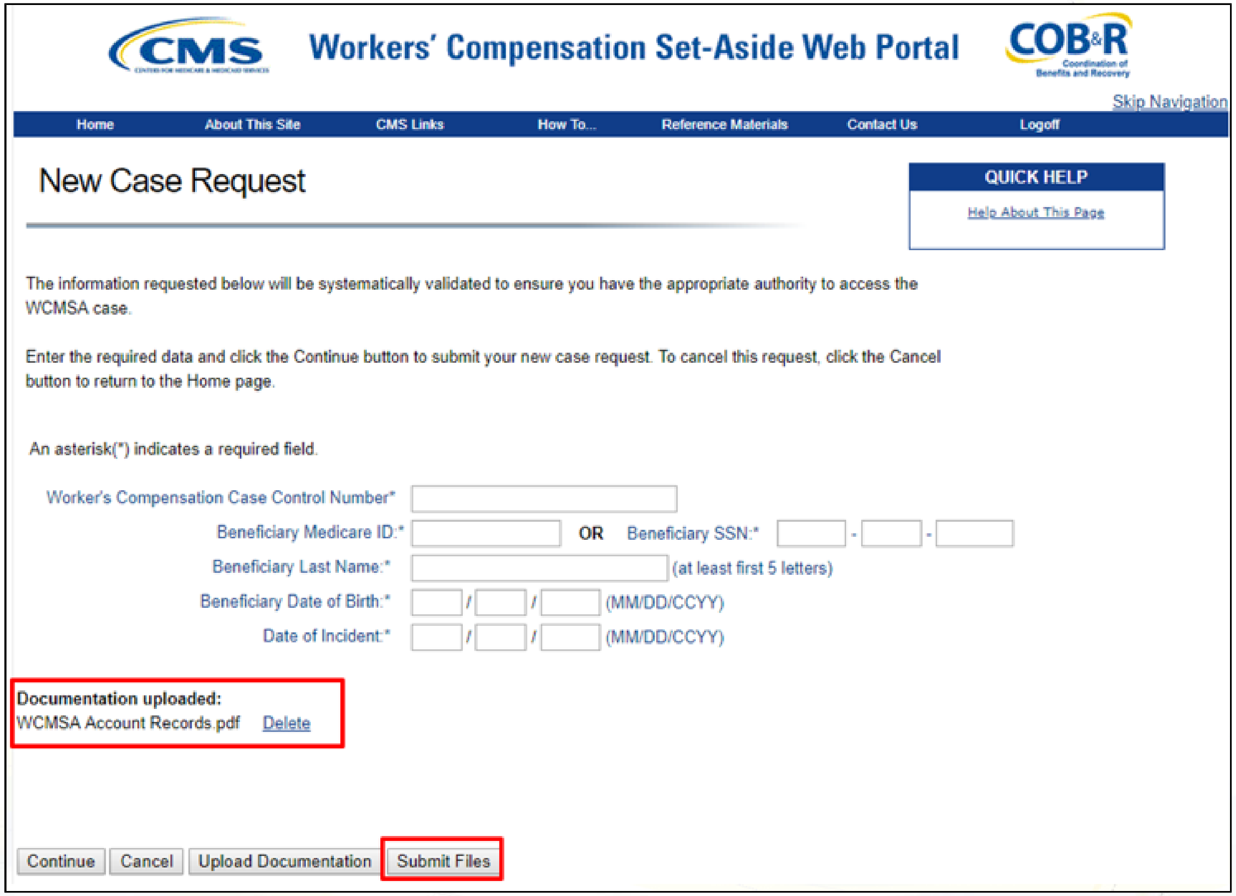
New Case Request – Upload Documentation

- Upload Documentation button will be active when the case requested has been previously approved, but documentation has not yet been received.
- Continue button will be disabled when Upload Documentation is active.

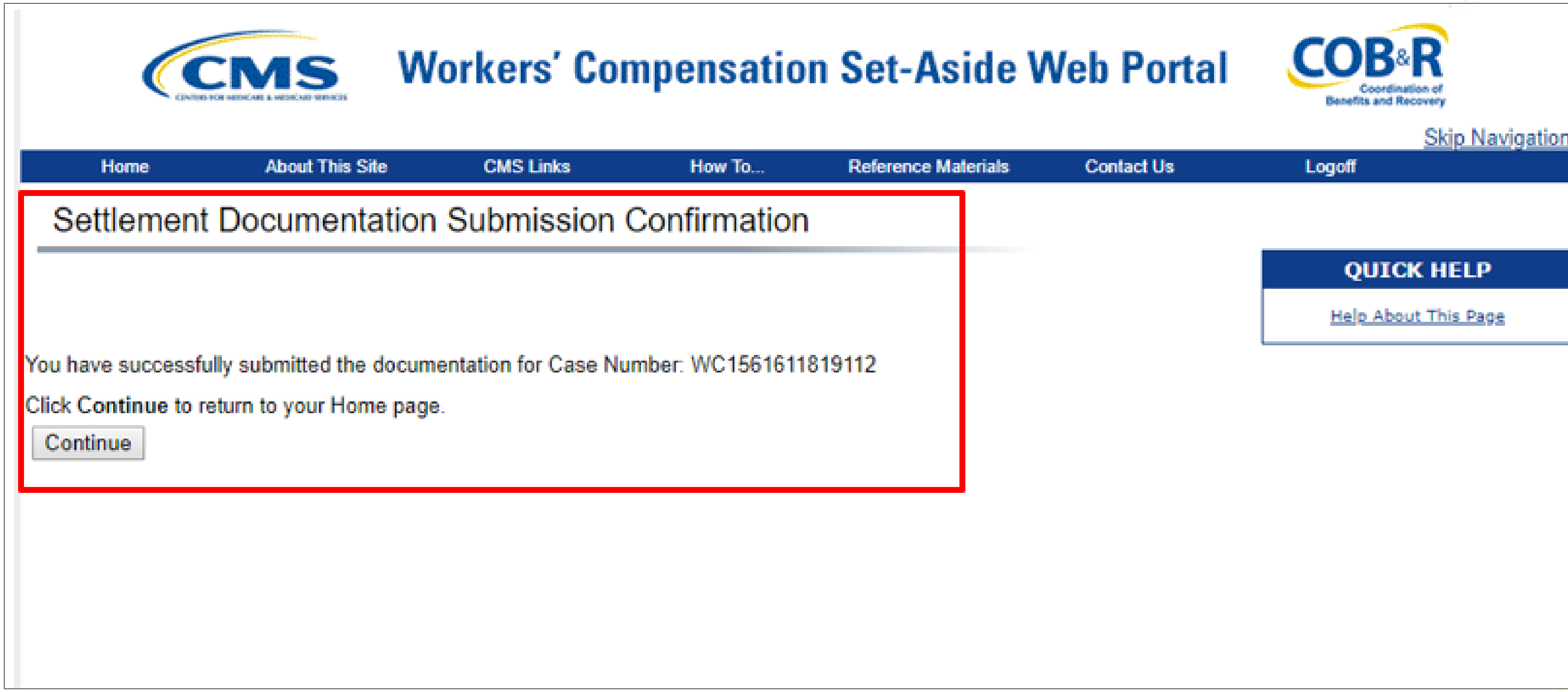


New Case Request – Submit Files

- Uploaded document name will appear with the option to “Delete” the file.
- Submit Files button will be displayed to submit the documentation.



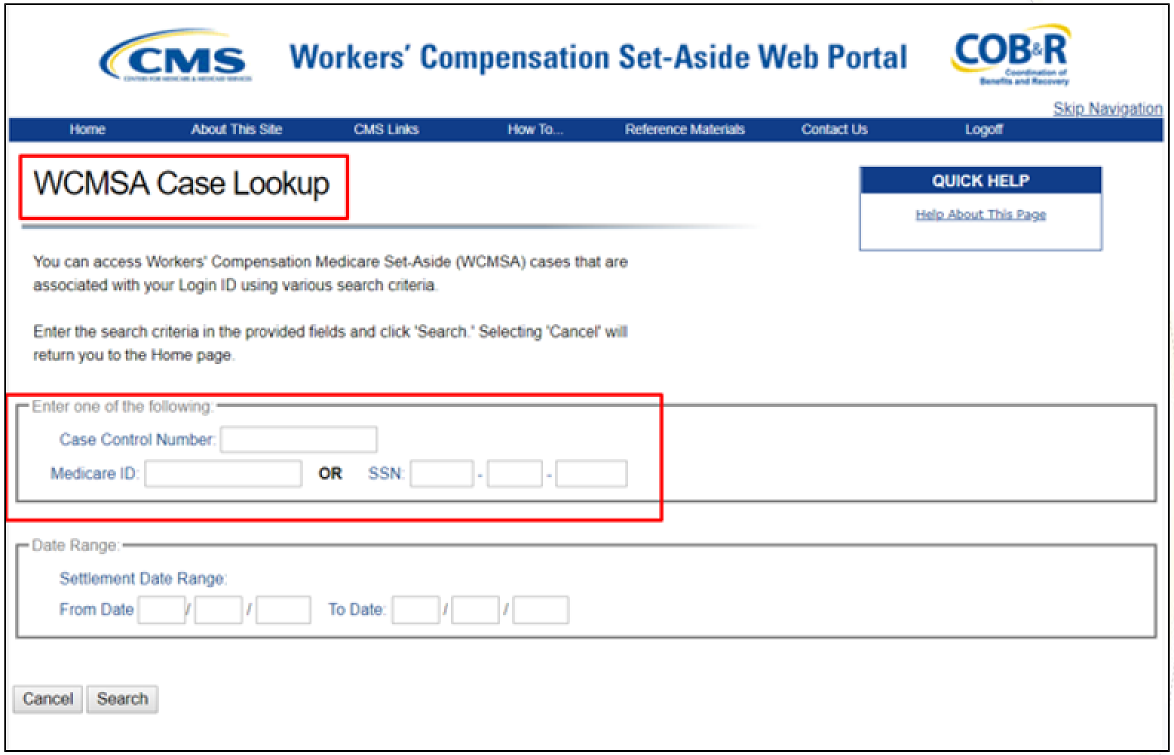
Settlement Documentation Submission Confirmation



WCMSA Case Lookup

Enter the following:

- Case Control #, Medicare ID or SSN
- Settlement Date Range



Case Lookup Results

- WCMSA Balance will be displayed on this page but can only be viewed by users who have requested access to the case and have been approved.

Workers' Compensation Set-Aside Web Portal

Skip Navigation

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

Case Lookup

QUICK HELP

Help About This Page

This page lists all WCMSAs that are associated with your Login ID that matched the search criteria provided. Select 'Continue' to return to the Home page.

Case Number	Claimant Name	Date of Injury	Settlement Date	WCMSA Balance
WC1211211212123	John Smith	1998-10-15	2018-10-15	59500.50
WC1211211212124	Michael Smith	2001-10-15	2017-10-15	67500.50
WC1211211212125	Tom Smith	2003-10-15	2016-10-15	35500.50
WC1211211212126	Xian Cao	2007-10-15	2015-10-15	97500.50

Continue

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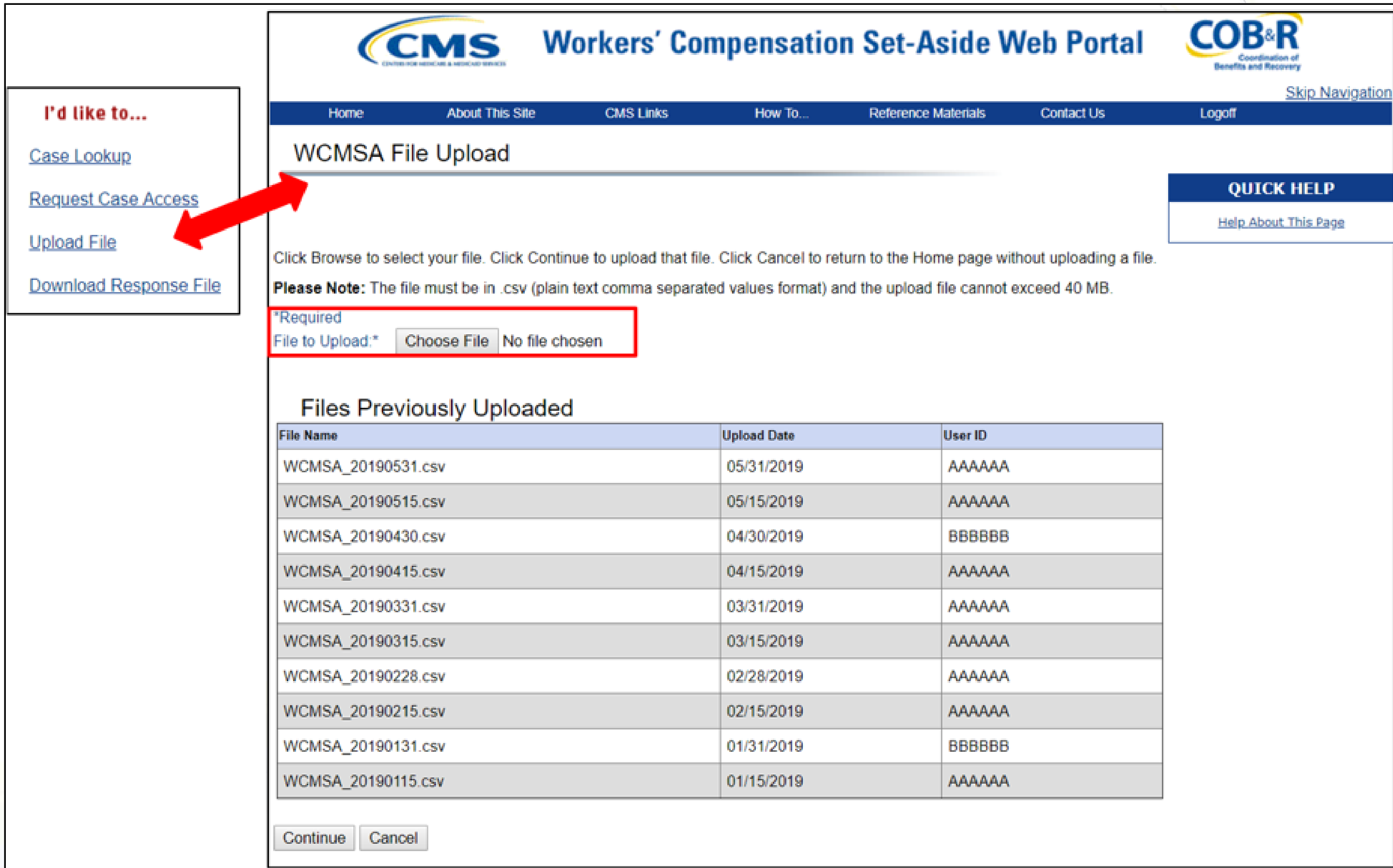
WCMSA File Upload

- Files must be in .csv format



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Skip Navigation

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

I'd like to...

Case Lookup

Request Case Access

Upload File

Download Response File

WCMSA File Upload

QUICK HELP

Help About This Page

Click Browse to select your file. Click Continue to upload that file. Click Cancel to return to the Home page without uploading a file.

Please Note: The file must be in .csv (plain text comma separated values format) and the upload file cannot exceed 40 MB.

*Required

File to Upload:* Choose File No file chosen

Files Previously Uploaded

File Name	Upload Date	User ID
WCMSA_20190531.csv	05/31/2019	AAAAAA
WCMSA_20190515.csv	05/15/2019	AAAAAA
WCMSA_20190430.csv	04/30/2019	BBBBBB
WCMSA_20190415.csv	04/15/2019	AAAAAA
WCMSA_20190331.csv	03/31/2019	AAAAAA
WCMSA_20190315.csv	03/15/2019	AAAAAA
WCMSA_20190228.csv	02/28/2019	AAAAAA
WCMSA_20190215.csv	02/15/2019	AAAAAA
WCMSA_20190131.csv	01/31/2019	BBBBBB
WCMSA_20190115.csv	01/15/2019	AAAAAA

Continue Cancel

File Layouts

- File Layouts and Error Codes can be found in the WCMSAP User Guide, Appendix B.
- The Input File must include the opening balance upon submission (See Transaction Type).

WCMSAP User Guide　　　　Appendix B: File Layouts and Error Codes

Appendix B: File Layouts and Error Codes

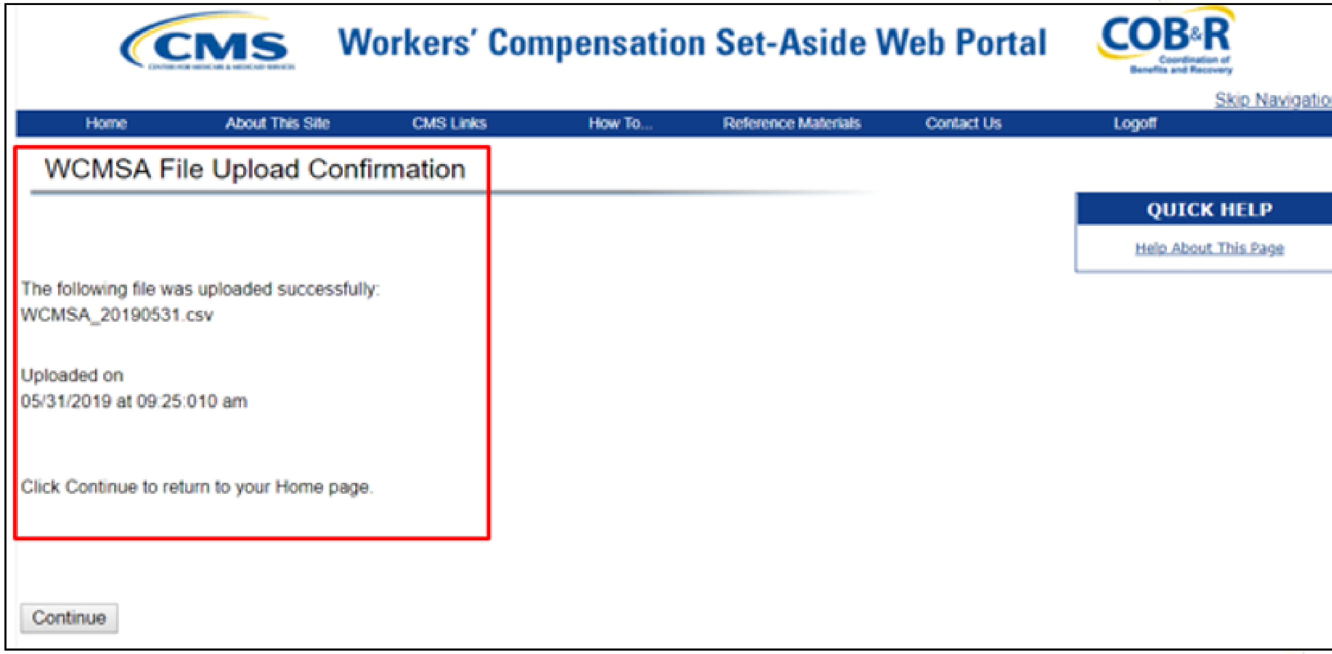
Table B-1: Professional Administrator Transaction File Layout

Field #	Field Name & Description	Format	Max Length	Field Required	Values/Requirements
1	**Account ID** Professional Administrator Account ID	Numeric	9	**Yes**	Must match the Account ID of Professional Administrator account the file is uploaded from.
2	**DCN** Document Control Number assigned by the Professional Administrator	Text	15	**Yes**	Each Add record for the Account ID must have a unique DCN.
3	**ACTION** Indicates the action the system is to take with the record – Add or Delete	Numeric	1	**Yes**	Valid values: 0 = Add 1 = Delete (not allowed when previously submitted transaction requesting to be deleted has Transa[illegible] '6')
4	**Case ID** Workers' Compensation Case Control Number	Text	15	**Yes**	Must match an exi[illegible] ID and be adminis[illegible] Professional Admi[illegible] the submitted Acc[illegible]
5	**Medicare ID** Beneficiary's Medicare ID (HICN OR MBI)	Text	12	Conditional **Required if SSN not provided**	When provided m[illegible] ID associated with[illegible]
6	**SSN** Beneficiary's Social Security Number	Numeric	9	Conditional **Required if Medicare ID not provided**	When provided m[illegible] associated with the[illegible] **Note:** If both SSN[illegible] submitted, the SS[illegible]
7	**Transaction Type** Indicates if the transaction is an expense or a deposit	Numeric	1	**Yes** *Not required when Action = '1' – Delete*	Valid Values: 1 – Beginning Balance 2 – Interest Earned 3 – Medical/RX Expense 4 – Taxes Paid on Interest 5 – Annual WCMSA Funds Exhausted 6 – WCMSA Funds Completely Exhausted

1 – Beginning Balance
2 – Interest Earned
3 – Medical/RX Expense
4 – Taxes Paid on Interest
5 – Annual WCMSA Funds Exhausted
6 – WCMSA Funds Completely Exhausted

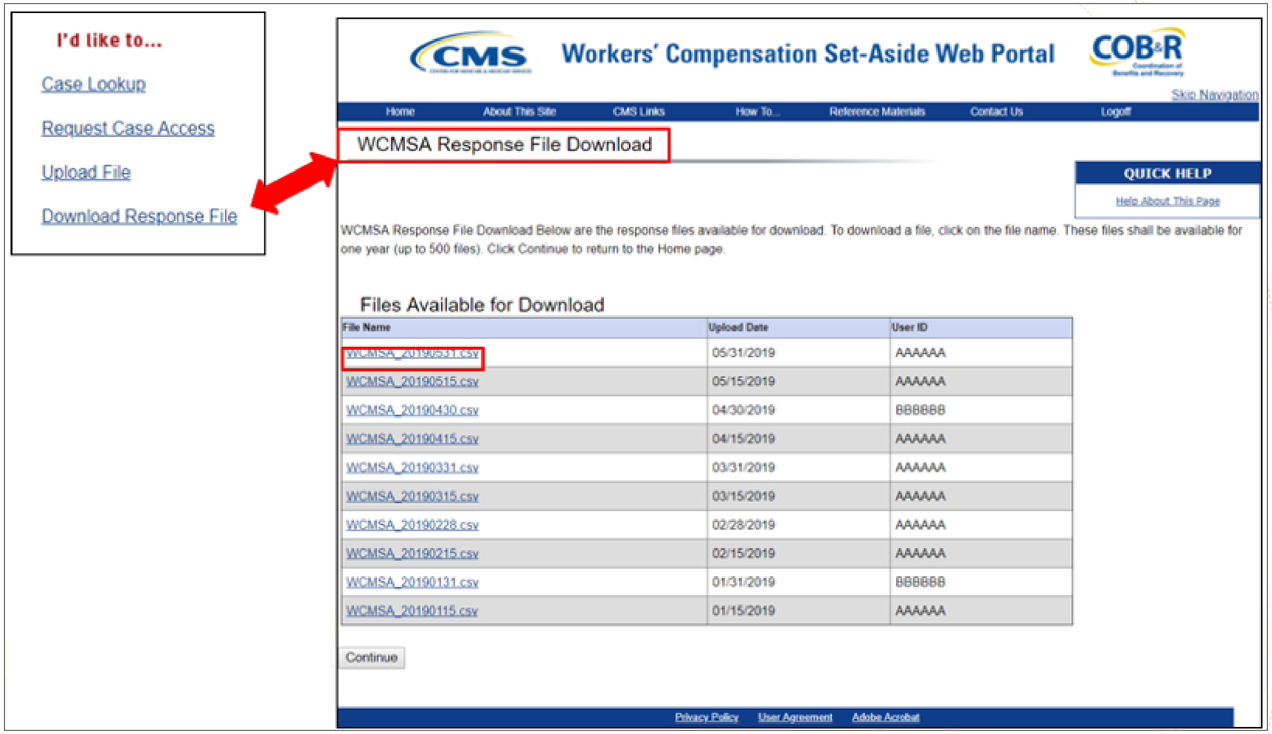
WCMSA File Upload Confirmation

- File name will appear, showing it was uploaded successfully.
- Date and time of upload will appear.
- Click Continue to your Home page.



WCMSA Response File Download

- Click on the file name to download the file.
- Files are available for one year if number of files does not exceed 500 files.
- Note: If you upload a large number of files and want to keep them for longer than one year, you will need to save an electronic copy for future reference.



Response File Layout/Error Codes

- The Professional Administrator Response File Layout table can be used to identify each field in your response file and also provides a description of that field.
- The Professional Administrator Response File Error Codes table can be used to identify the corresponding field and description of the error that caused your file to not be processed.

Table B-2: Professional Administrator Response File Layout

Field #	Field Name	Format	Max Length	Description / Value
1	**Account ID**	Numeric	9	Professional Administrator Account ID submitted on the Input file.
2	**DCN**	Text	15	DCN assigned by the Professional Administrator submitted on the input file.
3	**Action**	Numeric	1	Action submitted on the input file.
4	**Case ID**	Text	15	Workers' Compensation Case Control ID submitted on the input file.

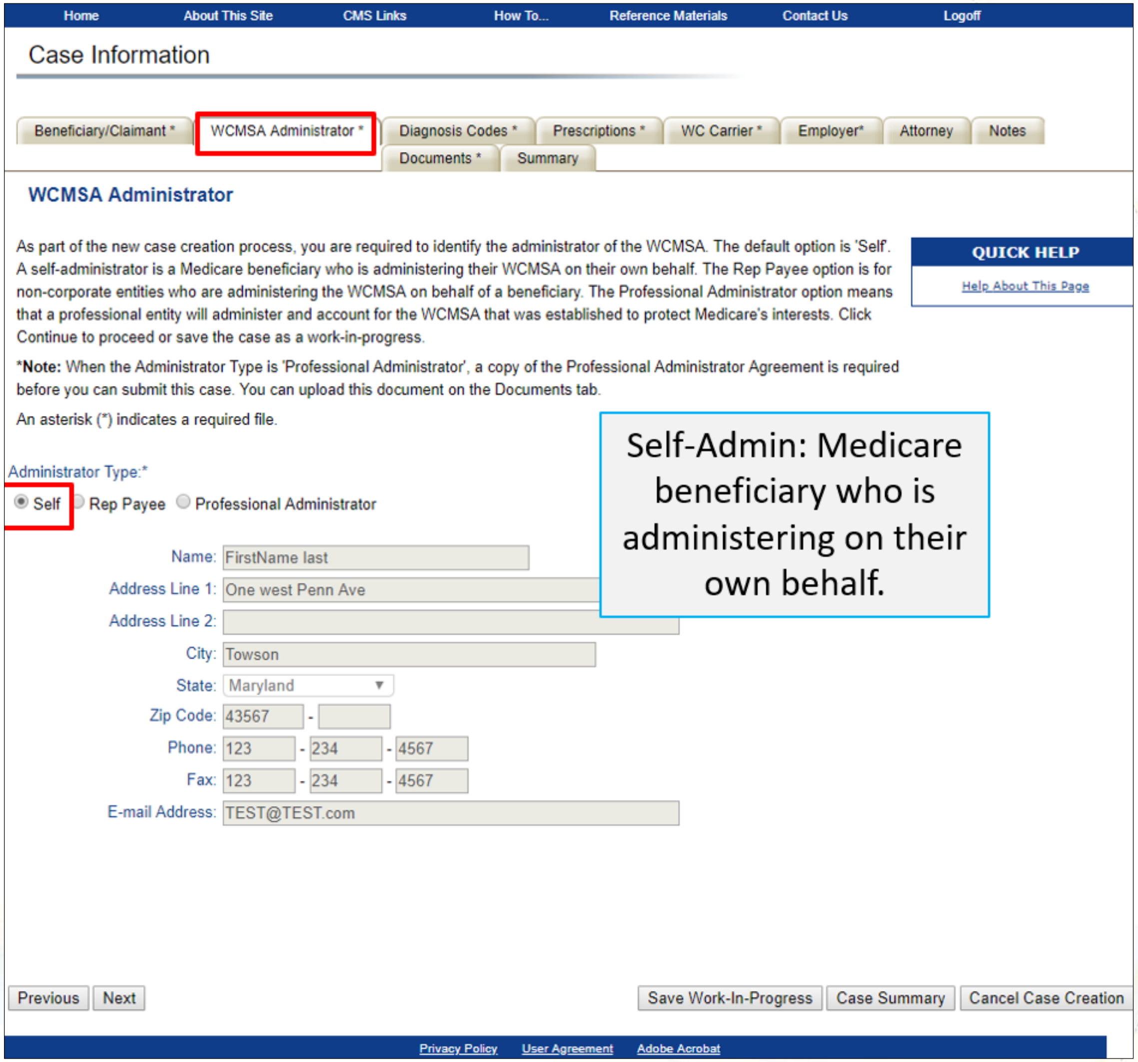
Table B-3: Professional Administrator Response File Error Codes

Error Code	Related Field	Error Description
R01	Account ID (Field 1)	**Invalid Account ID** • The Account ID on the transaction does not match the Professional Administrator Account ID the file was submitted from, or • The Account ID is missing from transaction record, or • The Account ID is not numeric
R02	DCN (Field 2)	**Invalid DCN** • The DCN is missing from the transaction record • The Action Code on the record is not = '1' – Delete and the DCN matches the DCN on a previously accepted record for the Case.
R03	Action (Field 3)	**Invalid Action** • Action is missing from the transaction record, or • The Action is not equal to '0' or '1'
R04	Case ID (Field 4)	**Missing Case ID** • Case ID is missing from the transaction record
R05	Case ID (Field 4)	**Administrator not associated to Case** • The EIN of the case Administrator does not match the EIN of the Professional Administrator Account that submitted the transaction

Updated Functions for Corporate Users

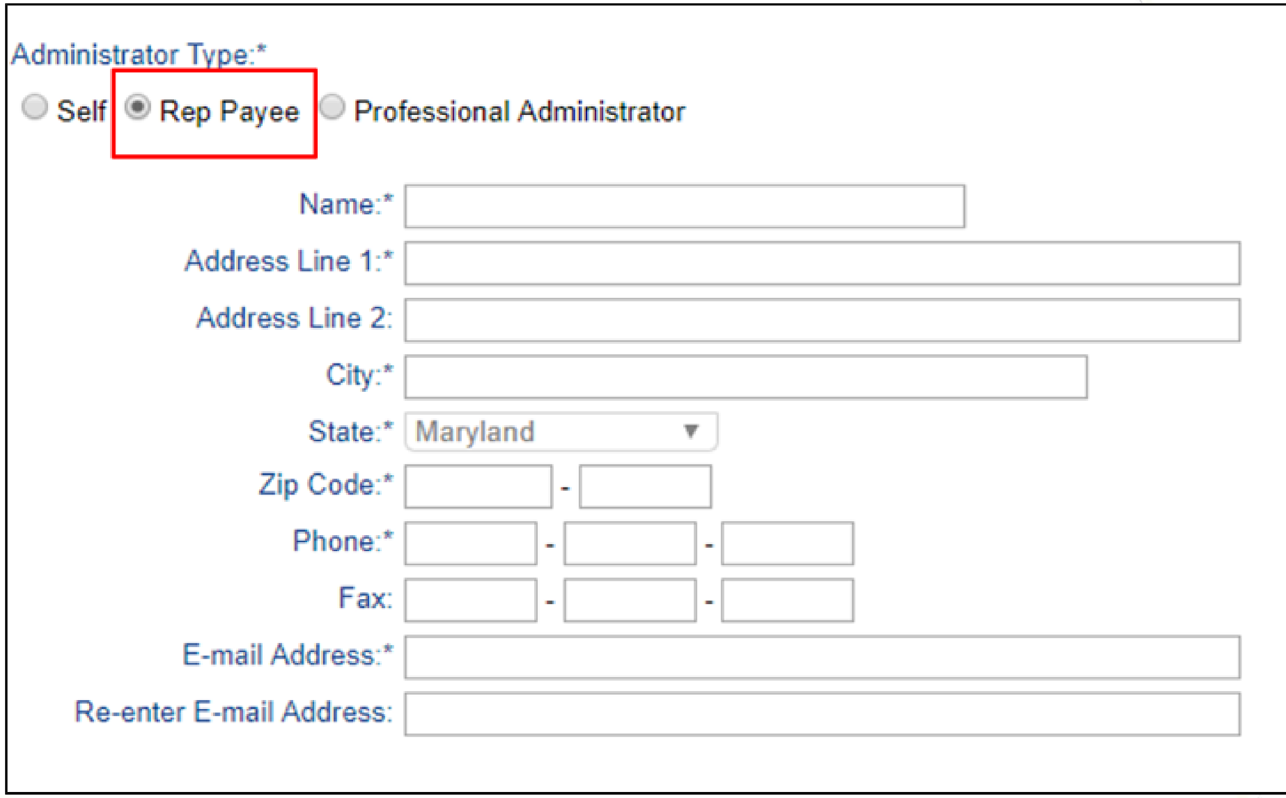
Case Information (Corp)

- New tab, "WCMSA Administrator" will be displayed.
- Administrator Type is a required field as indicated by the asterisk.
- Default option is "Self."



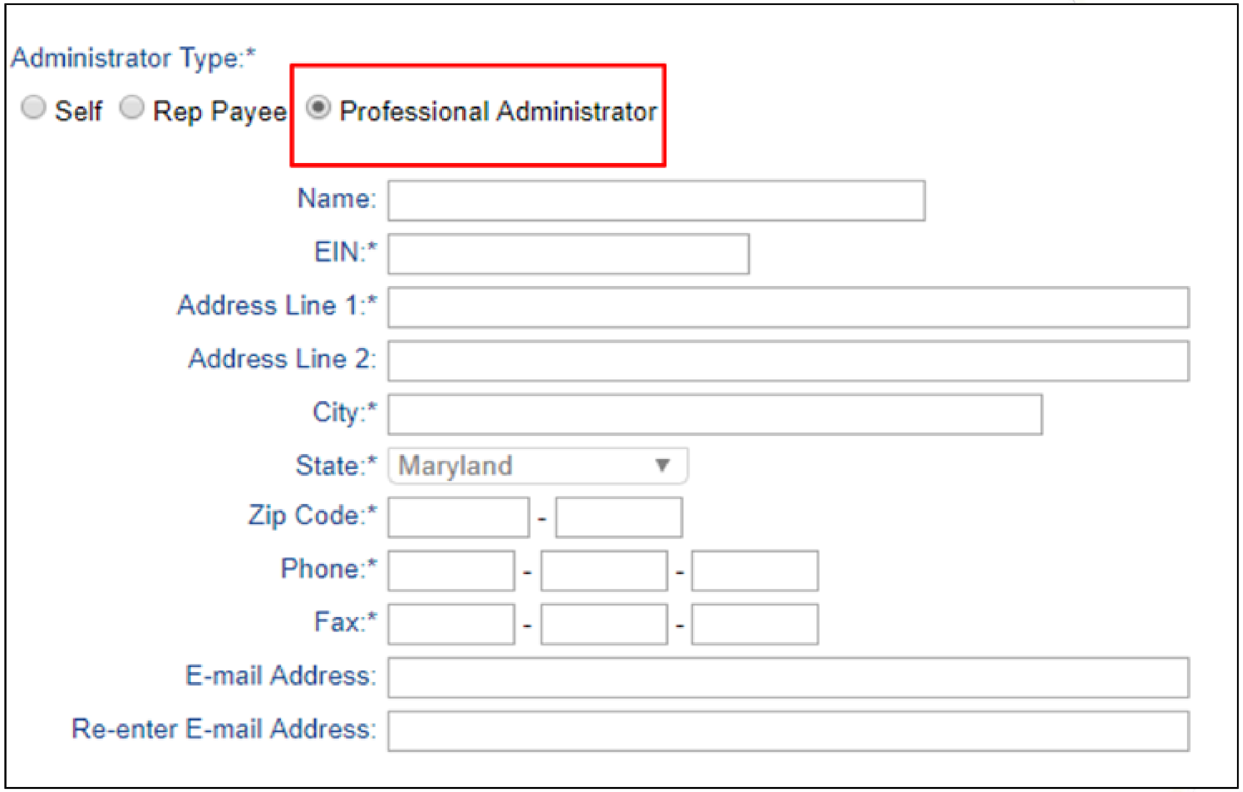
Case Information (Corp) (2)

- Rep Payee: For non-corporate entities who are administering on behalf of a beneficiary.



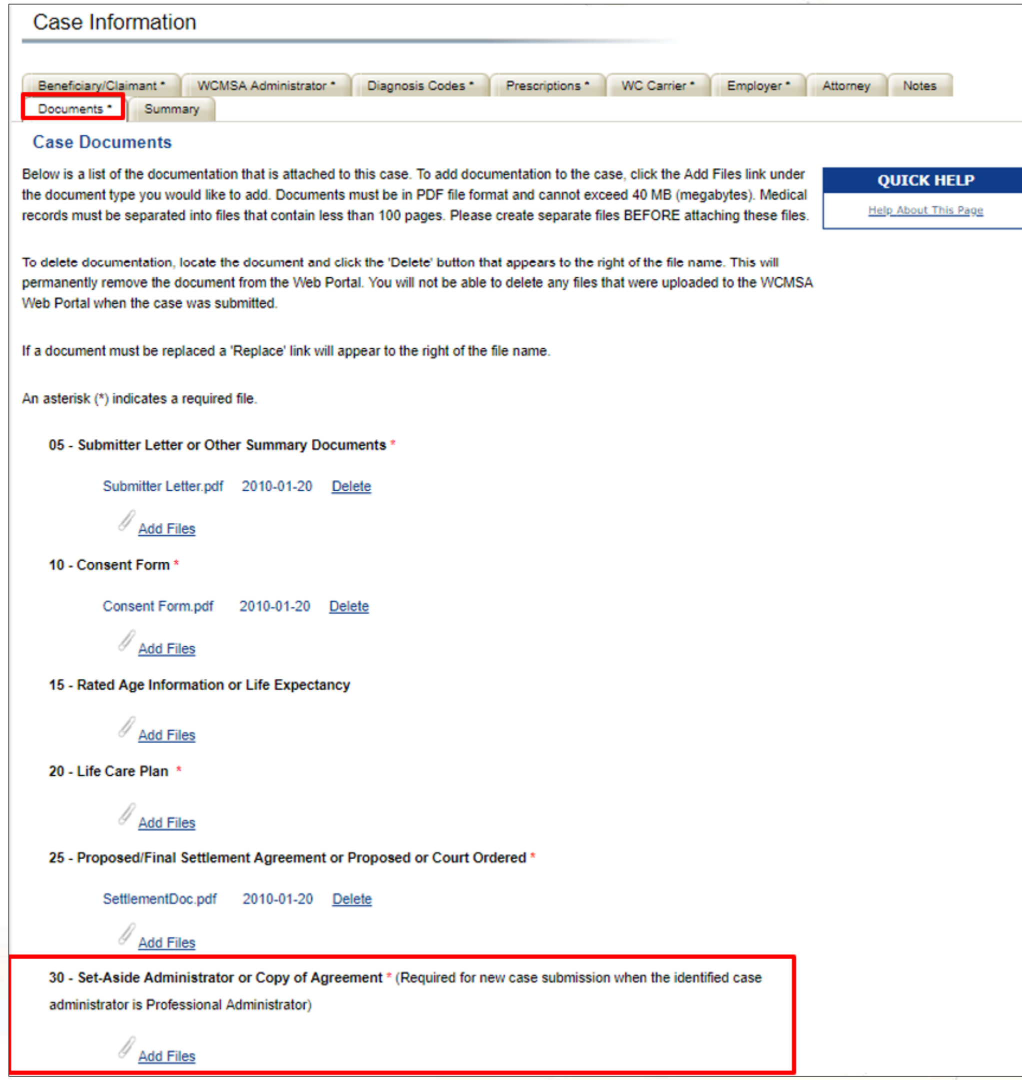
Case Information (Corp) (3)

- Prof. Admin: A professional entity will administer and account for the WCMSA that was established to protect Medicare's interests.
- This requires a copy of the Prof. Admin Agreement before the case can be submitted.



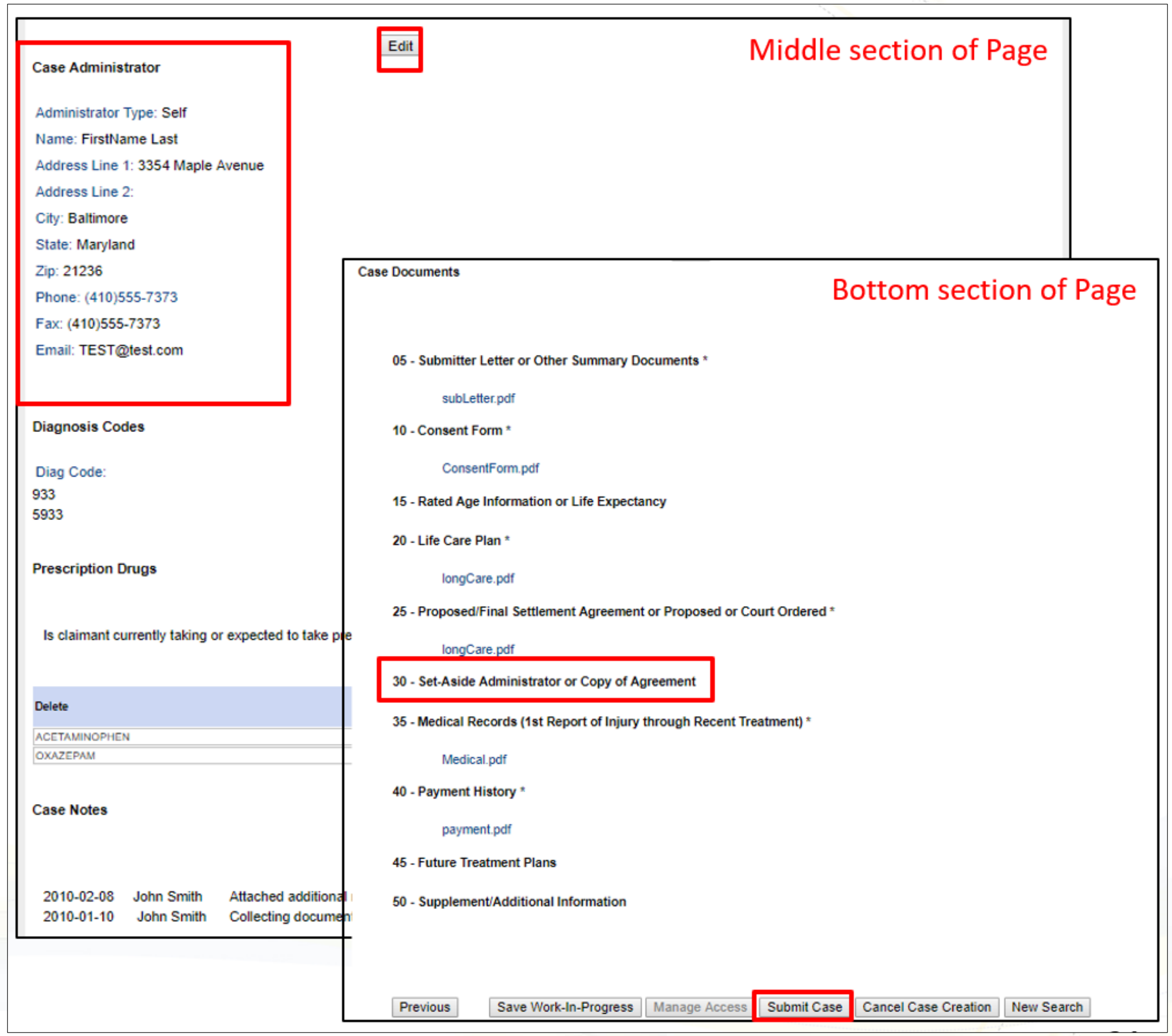
Case Documents

- Set-Aside Administrator or Copy of Agreement will be required for new cases whose admin type is marked as a Professional Administrator.



Case Summary Cont. (Corp)

- Use the Edit button to make changes if needed.
- Document Type 30 has been added to the Case Documents section.
- An indicator has been added and will appear if the Administrator Type is Professional Administrator and the document type 30 was not added.
- Click Submit Case once you have verified all information is correct.



Additional Resources

- [WCMSAP User Manual]
- [WCMSAP Training Materials]
- EDI Department: 1-646-458-6740
- Email: mspcentral@cms.hhs.gov

Questions & Answers

COB&R
Coordination of Benefits and Recovery

Slide 1: Workers' Compensation Attestation Enhancement Webinar for Corporate Users and Professional Administrators

Welcome to the Workers' Compensation Attestation Enhancement Webinar for Corporate Users and Professional Administrators.

Slide 2: Presentation Topics

Throughout this presentation, we will look at the background information, purpose of the enhancement, how to register as a Professional Administrator, new functionality and additional resources.

Slide 3: Background Information

Today, each year, no later than 30 days after the anniversary date of the Workers' Compensation settlement, you must send an attestation to Medicare's Benefits Coordination & Recovery Center (BCRC) stating that you have used the funds in the account correctly. In the past, transactions regarding Workers' Compensation Medicare Set-Aside (WCMSA) accounts, including annual attestations, had to be completed using U.S. Mail.

Slide 4: Purpose of Enhancement

The purpose of this enhancement is to add functionality to allow Professional Administrators to register accounts on the Workers' Compensation Medicare Set-Aside Portal (WCMSAP) as well as functionality to allow Professional Administrators to submit files of account transactions and view account balance information related to WCMSA accounts for which they administer. This eliminates the need to submit information on WCMSAs via U.S. Mail, but mailing is still an option if preferred.

Slide 5: Registering as a Professional Administrator

We will begin by looking at the process of registering as a Professional Administrator.

In order to use the WCMSAP, Professional Administrators will be required to complete a two-step process: Registration and Account Setup.

Registration will be completed by the company's named Account Representative. This is the individual in the organization who has the legal authority to bind the organization to a contract and the terms of WCMSAP requirements and processing. The Account Representative will complete the initial step in the registration process, but will not be provided with a Login ID.

Account Setup will be performed by the company's named Account Manager. The Account Manager will control the administration of the Professional Administrator account. They may also invite other company employees or data processing agents to assist.

Slide 6: Registering as a Professional Administrator (2)

Entities who wish to use the WCMSAP as a Professional Administrator are required to create a new WCMSAP account. This means an Account Representative (AR) will have to be named and perform the initial registration steps and invite an individual Account Manager to complete the Account Setup.

The Account Manager can then invite Account Designees. After the account has been set up, the Account Manager or Account Designee for the account can request case access for each case they have authority to administer and are required to provide the current/opening balance for all existing WCMSAs they want to administer on the WCMSAP before transaction records will be accepted for the case.

Note: Professional Administrators will only need to provide the opening balance for cases that were set up prior to this enhancement that they wish to submit transaction records for in order to no longer have to submit a paper attestation.

Slide 7: Login Warning Page

Anytime you access WCMSAP, the Login Warning page will appear, and you will need to click "I Accept" to continue to the Welcome Page.

Slide 8: Welcome to WCMSAP

From the Welcome to the WCMSAP page, you will be able to register for your Professional Administrator account by clicking the New Registration link.

Note: As noted previously registering for an account is a two-step process, the user will come back to this page to complete Step 2: Account Setup. Users will return to the Welcome page to login once account setup is completed.

Slide 9: Select Account Type

Next, the Select Account Type page will appear. You will need to select the radio button for Professional Administrator and then click next. You will notice the statement associated with the selection that indicates the entity is registering with an Employee Identification Number (EIN) and will be the responsible party for administering MSA funds and reporting to Medicare.

Note: Users can use the Quick Help - Help About This Page link to get more information about each page and the fields within that page.

Slide 10: Professional Administrator Information

You will then see the Professional Administrator Information page. All information with an asterisk is required and will need to be completed before clicking the next button to proceed to enter your Account Representative information.

Slide 11: Account Representative (AR) Information

The Account Representative Information page will appear. Again, all information with an asterisk is a required field and must be completed before continuing. Click Next to continue.

Slide 12: Registration Summary

You now can review all the information you have entered on the Registration Summary page. Use the Edit buttons next to each section to make corrections and submit your Registration for a Professional Administrator Account.

Slide 13: Thank You

When a registration application is submitted, the information provided will be validated by the Benefits Coordination and Recovery Center (BCRC). Once this is completed, the BCRC will send a letter via the US Postal Service to the named Authorized Representative with an Account ID and personal identification number (PIN). Your Account Representative should receive the PIN letter within 10 business days after the New Registration step is completed. The Account Manager will then use this information to complete your account setup. The Account Manager or any authorized Account Designees will then be able to access your account. Use the link at the bottom of the page to return to the Welcome page.

Note: For more information on Account Setup, please see the Corporate/Professional Administrator Account Setup training on CMS.gov.

Slide 14: Functions of a Professional Administrator

Next, we will look at the functions a Professional Administrator has by accessing your Account ID.

Slide 15: WCMSAP Account List

After accessing your account from the Account List page, you will now see your associated account ID for your Professional Administrator account listed on the Account List page.

Slide 16: WCMSAP Account List (2)

Let's look at your options/functions under your account ID. "The WCMSAP provides an interface for you to view summary information for WCMSA cases you administer by utilizing the Case Lookup function. You can also upload account transaction files and receive corresponding response files for the WCMSAs you administer." Let's go ahead and look at the Account ID link for your Professional Administrator Account.

Slide 17: WCMSAP Home Page

As a Professional Administrator, you will be able to perform a Case Lookup, Request case access, upload transaction files and download response files. Let's look at each of the options beginning with Requesting Case Access.

Slide 18: New Case Request

The Request Case Access will allow you to associate cases with your Login ID if the Employee Identification Number (EIN) for the Administrator of the case matches the EIN of the Professional Administrator account from which you are requesting access to the case. This will allow you to view the current balance of the case in the WCMSAP in order to reconcile their accounts. For the New Case Request, enter all required data and click continue.

Slide 19: New Case Request Confirmation

The information entered will appear on the New Case Request Confirmation page showing that you have successfully associated the case to your account. Click Continue to return to New Case Request page.

Slide 20: New Case Request – Upload Documentation

When final settlement documentation has not been received, you will not be able to perform a new case request until this information has been provided and validated. You may use the Upload Documentation button to perform this action. The Upload Documentation button will only appear if the case requested has been previously approved, but the settlement documentation has not been received yet. When the Upload Documentation button is active, the Continue button will be disabled.

Slide 21: New Case Request – Submit Files

Once the documents are uploaded, they will now appear on the New Case Request page with a Delete link to the file/document if you wish to make changes or have chosen the incorrect file name. Otherwise, click the Submit Files button to submit the file(s).

Slide 22: Settlement Documentation Submission Confirmation

The Settlement Documentation Submission Confirmation page will be displayed to confirm that your document was successfully submitted for the indicated WCMSA case number. Once the documentation has been validated, you will be able to perform the new case request to associate the case to your Account ID. Click Continue to return to the Home page.

Slide 23: WCMSA Case Lookup

The Case Lookup page allows you to search for cases associated with your login ID in order to view the current balance of the case. Enter the Case Control Number, the Medicare ID, or SSN and click search.

Note: The Settlement Date Range fields are for potential future use only.

Slide 24: Case Lookup Results

The Case Lookup page will return a set of results that match the criteria entered. This page will display the WCMSA for each case where the request case access function has been successfully performed. Click Continue to return to the Home page. Note: It is possible that the search criteria may return multiple results for an individual claimant.

Slide 25: WCMSA File Upload

Moving on to the Upload File link, this option will allow Professional Administrators to upload transaction files in .csv format. You access this page by clicking the Upload File link on your home page, located at the top left corner of this slide. You will use the Choose File button to enter the file name or browse your PC for the file. Once the file has been located, you can click Continue to upload the file.

Note: PAs will also be able to see a list of previously uploaded files in the table on this page.

Slide 26: File Layouts

For assistance with creating the input file, please see the Professional Administrator Transaction File Layout in Appendix B in the WCMSAP User Guide. The Transaction Types that can be submitted are:

1 – Beginning Balance

2 – Interest Earned

3 – Medical/RX Expense

4 – Taxes Paid on Interest

5 – Annual WCMSA Funds Exhausted

6 – WCMSA Funds Completely Exhausted

You will be required to submit the beginning balance for each case that was in process/previously approved prior to Oct 7th.

Slide 27: WCMSA File Upload Confirmation

The File Upload Confirmation page will appear, showing the file was uploaded successfully along with the date and time it was uploaded. Click Continue to return to your Home page.

Slide 28: WCMSA Response File Download

Lastly, the Download Response File option will allow you as the Professional Administrator to download response files created for transaction files you have submitted. To download a file, click on the file name. The table will display the file names of up to the most recent 500 files uploaded for the year, a maximum limit of 500 files will be displayed. If you wish to return to the Home page at any time, click Continue.

Note: If you upload a large number of files and want to keep them for longer than one year, you will need to save an electronic copy for future reference.

Slide 29: Response File Layout/Error Codes

When reviewing your response files, you can again reference the WCMSAP User Guide, Appendix B for the Response File Layout and Error Codes.

Slide 30: Updated Functions for Corporate Users

Finally, we will look at the updated functions for a Corporate user.

Slide 31: Case Information (Corp)

When creating a case through the Create a New Case link, you will now see a new tab for WCMSA Administrator has been added. As part of the new case creation process, you will be required to identify the administrator of the WCMSA. The default option is “Self.” A Self Administrator is a Medicare beneficiary who is administering their WCMSA on their own behalf.

Slide 32: Case Information (Corp) (2)

The Rep Payee option is for non-corporate entities who are administering the WCMSA on behalf of the beneficiary.

Slide 33: Case Information (Corp) (3)

The Professional Administrator option means that a professional entity will administer and account for the WCMSA that was established to protect Medicare's interests. When the Professional Administrator type is selected, the Professional Administrator Agreement is required before you can submit the case.

Slide 34: Case Documents

You can upload the Set-Aside Administrator or Copy of Agreement on the Documents tab. You will see that the document is marked with an asterisk indicating that it is required. Click the Add Files link for the Set-Aside Administrator or Copy of Agreement to add the required document. You will not be able to submit the case until this document and all other required documents have been added.

Slide 35: Case Summary Cont. (Corp)

Once all your information has been entered and your required documents attached, you will continue to the Case Summary Tab to confirm your data. You will see that the Case Administrator section has been added and the Case Documents section has been updated to include the Set-Aside Administrator or Copy of Agreement section. If the document was not added, a new indicator has been added to alert you that a document is required for document type 30 for new case creation if the Administrator Type is Professional Administrator. Once all information has been verified, click the Submit Case button.

Slide 36: Additional Resources

Additional information can be found in the WCMSAP User Guide which is available in the Resources link in the portal and in the WCMSAP Training Materials available on CMS.gov. For any issues with your WCMSAP account, contact the EDI Department at 1-646-458-6740.

Slide 37: Questions & Answers

This concludes our presentation. We will now move into the question and answer portion of the webinar.

Acronyms

AD	Account Designee
AM	Account Manager
AR	Account Representative
BCRC	Benefits Coordination & Recovery Center
CMS	Centers for Medicare & Medicaid Services
EDI	Electronic Data Interchange
EIN	Employee Identification Number
MSA	Medicare Set-Aside
PA	Professional Administrator
PIN	Personal Identification Number
WCMSAP	Workers' Compensation Medicare Set-Aside Portal