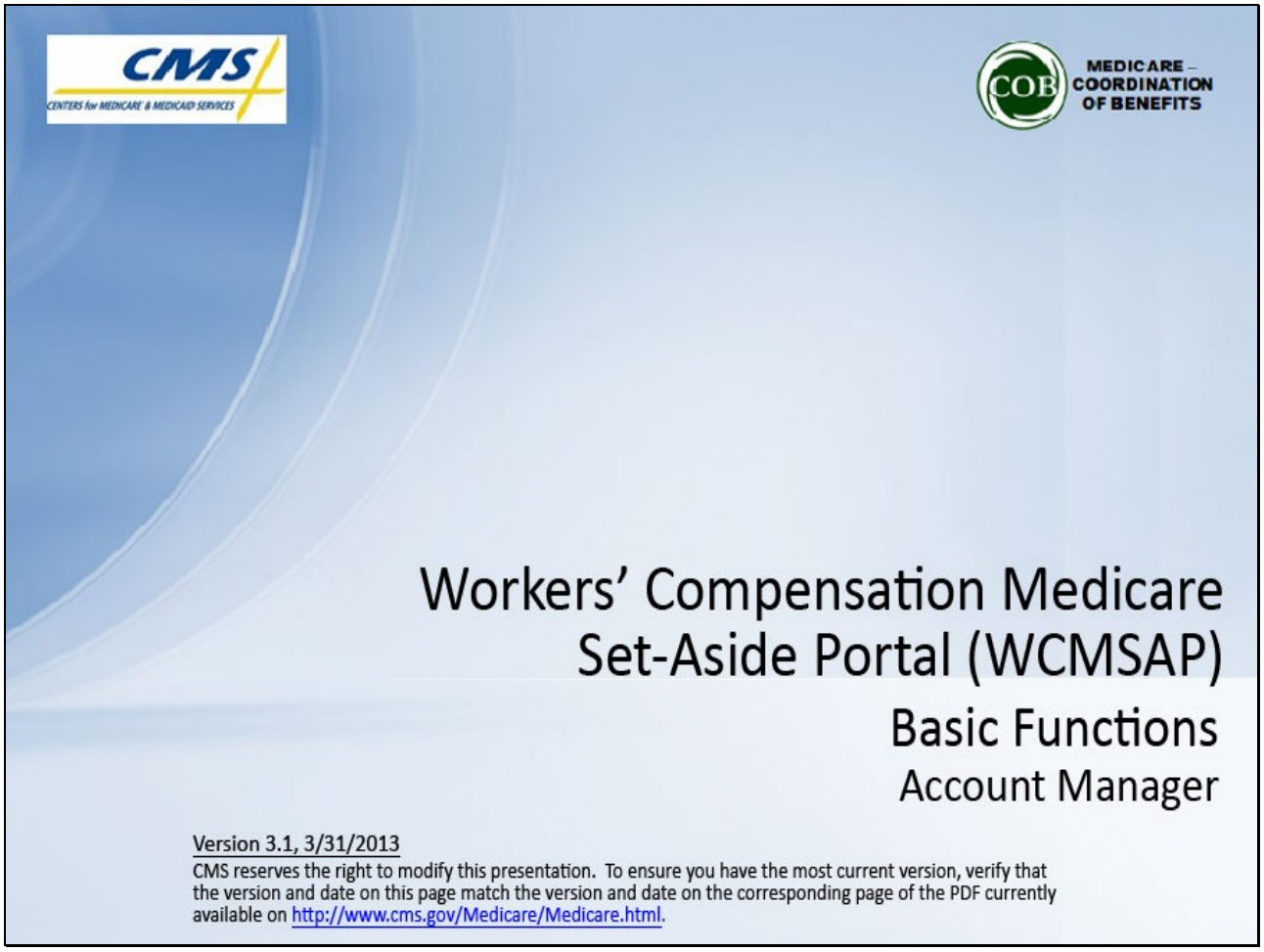
Slide 1 - of 53



Slide notes

Welcome to the Workers' Compensation Medicare Set-Aside Portal (WCMSAP) Basic Functions-Account Manager course.

As a reminder, you may view the slide number you are on by clicking on the moving cursor.

Additionally, you can view the narration by clicking the Closed Captioning [CC] button in the lower right hand corner of the screen.

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Disclaimer

While all information in this document is believed to be correct at the time of writing, this Computer Based Training (CBT) is for educational purposes only and does not constitute official Centers for Medicare & Medicaid Services (CMS) instructions for the WCMSAP. All affected entities are responsible for following the applicable CMS instructions found at the following link: http://www.cms.gov/WorkersCompAgencyServices/.

Slide notes

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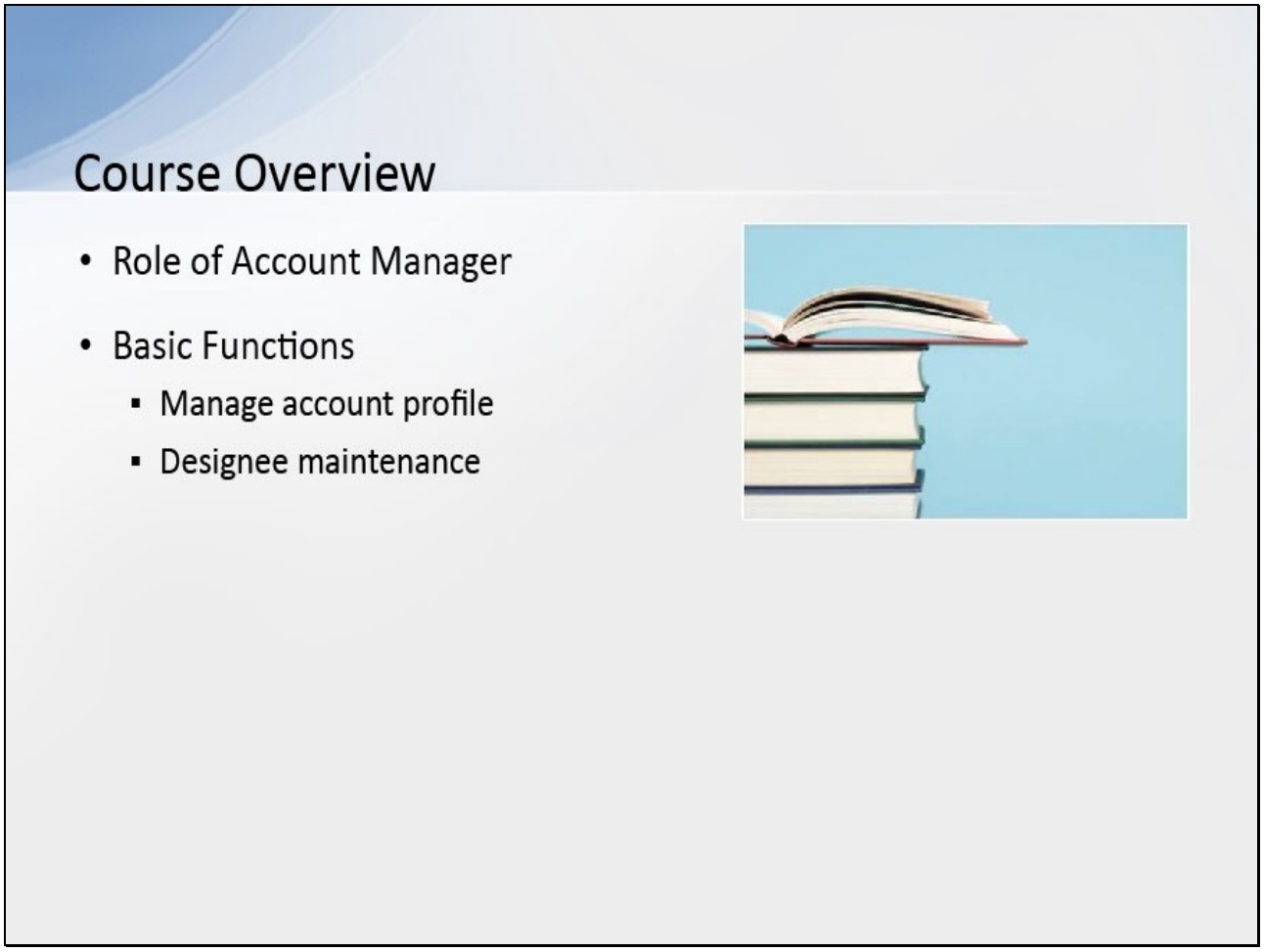

Slide notes

This course describes the role and the basic functions available to the Account Manager including managing the account profile and designee maintenance.

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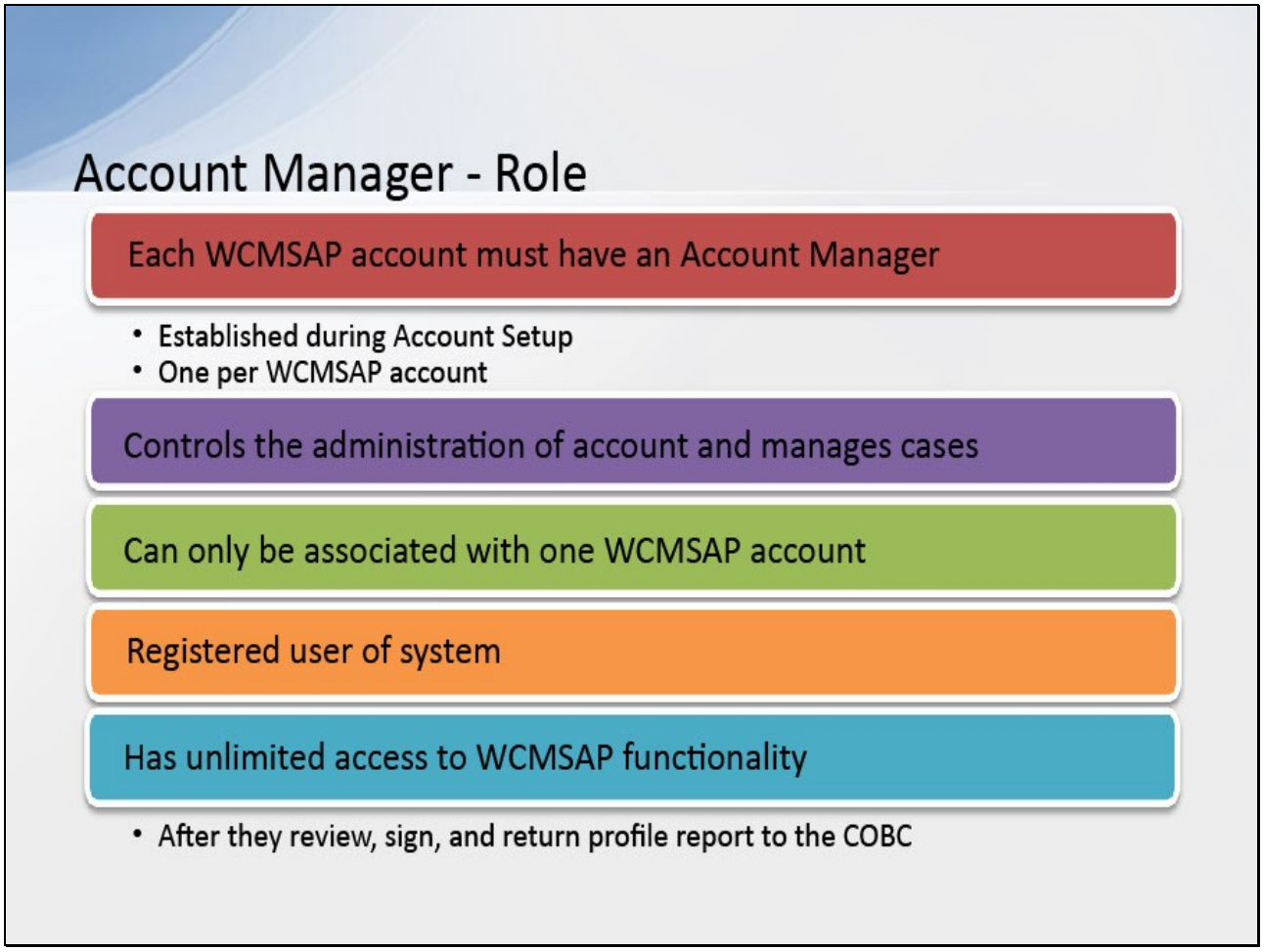

Slide notes

Each WCMSAP account must have an assigned Account Manager. The Account Manager is established during the Account Setup process. Each WCMSAP account can have only one Account Manager.

This is the individual who controls the administration of an organization's account and manages cases, which includes managing case access.

The Account Manager can only be associated with one WCMSAP account. The Account Manager is a registered user of the system.

The Account Manager for Representative and Self accounts will have unlimited access to WCMSAP functionality and cases as soon as the Coordination of Benefits Contractor (COBC) has received their signed profile report.

For Corporate account types, the Account Manager will only be granted access after the profile report is signed and returned by the Account Representative.

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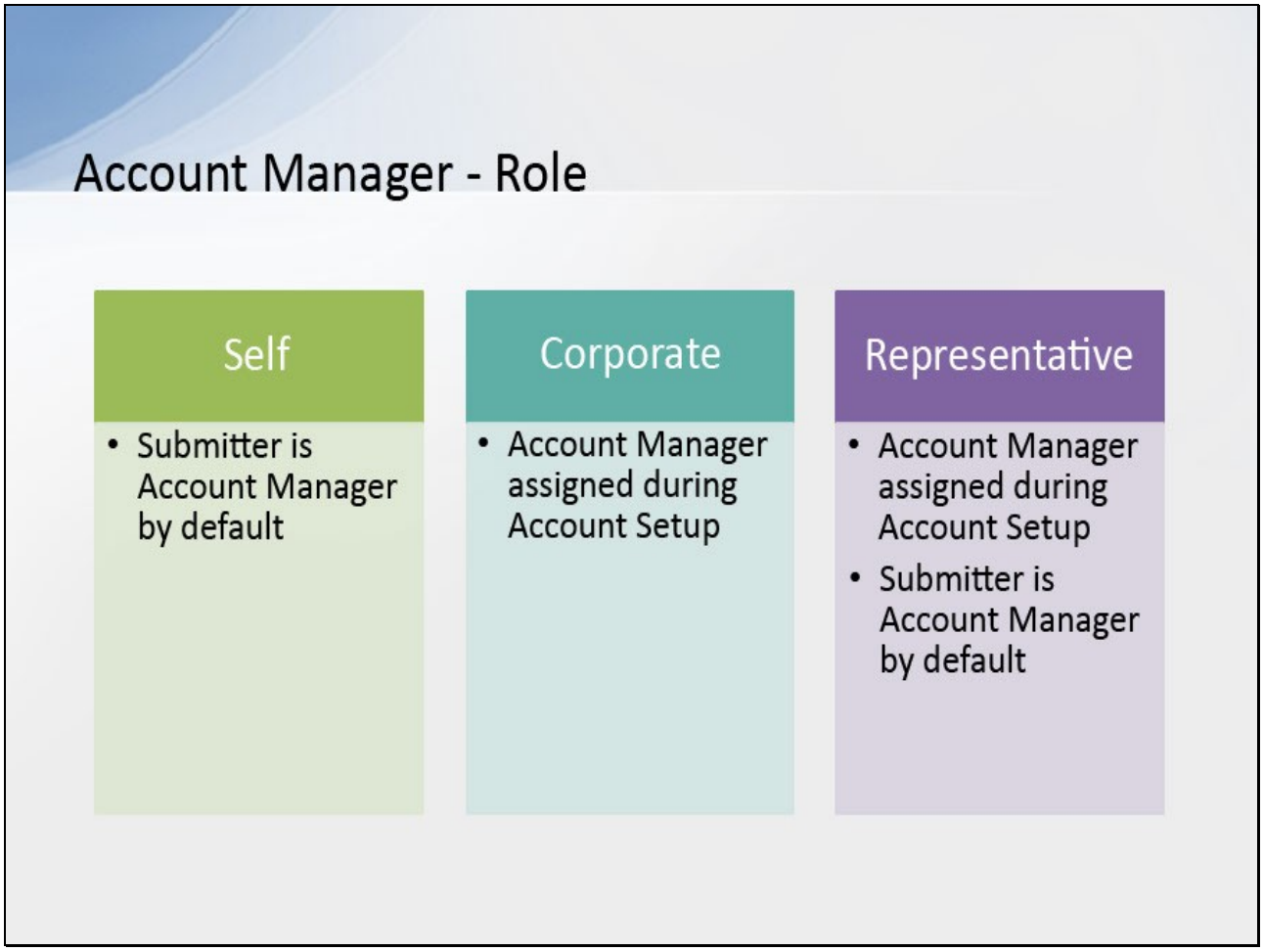

Slide notes

The Account Manager for Self account types is, by default, the submitter.

For Corporate and Representative account types, the Account Manager is assigned during the Account Setup process.

For Representative accounts, the submitter may be the Account Manager, but they have the option to assign the Account Manager role to another person.

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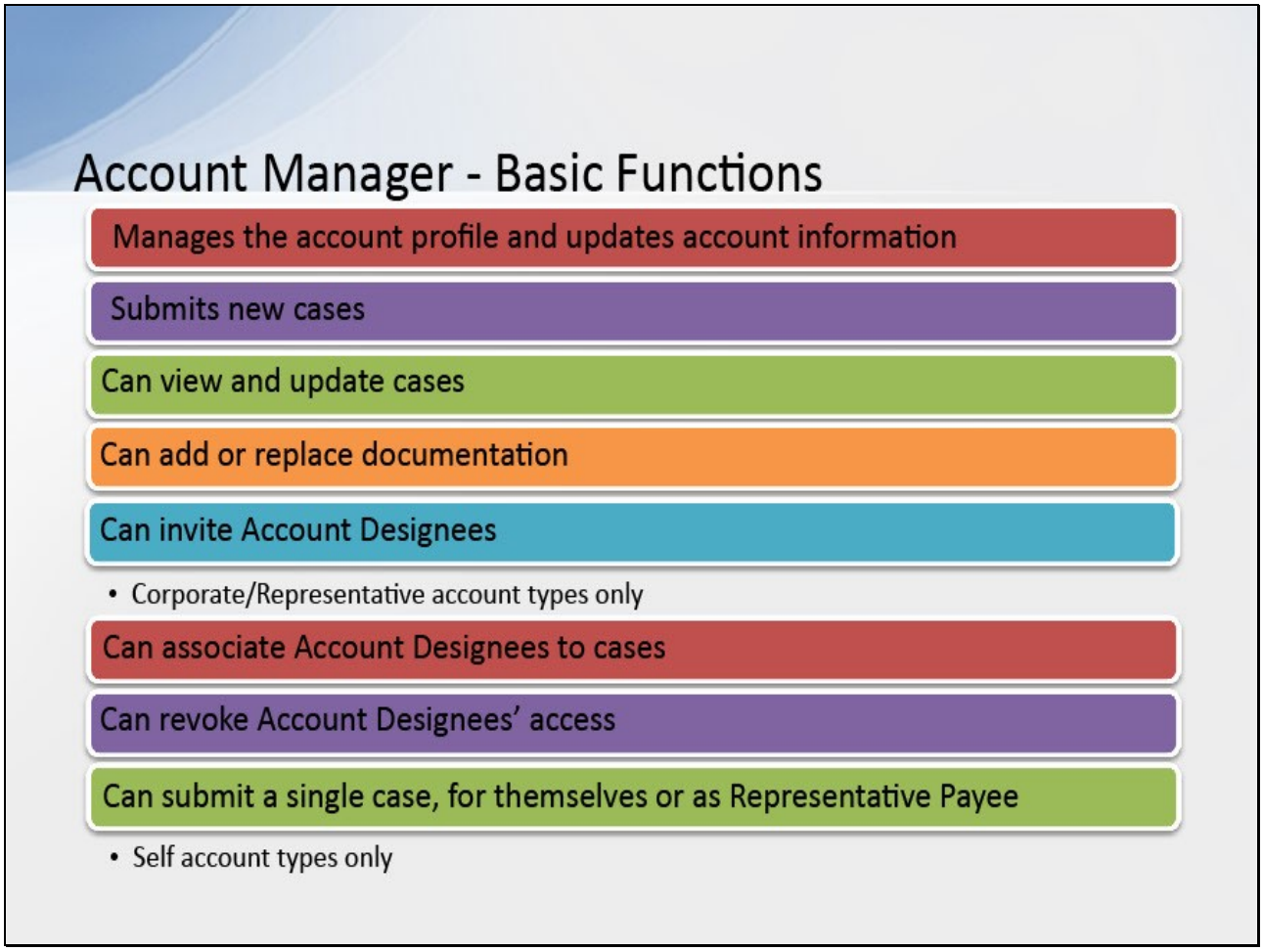

Slide notes

The Account Manager manages the WCMSAP account's profile information and updates general account information; Submits new cases for the WCMSAP account they are associated with;

Can view and update all cases for the WCMSAP account they are associated with; Can add or replace documentation to a specific case for the account; Can invite other users to function as Account Designees. (Account Designees are for Corporate or Representative account types only.);

Can associate an Account Designee to cases; Can revoke Account Designee's' access to cases and/or an entire WCMSAP account; Can submit a single case, as an Account Manager or as a Representative Payee. (For Self account types only.);

To replace an Account Manager, the Account Representative for Corporate accounts, or the original submitter for Representative accounts, must contact the COBC Electronic Data interchange (EDI) Department.

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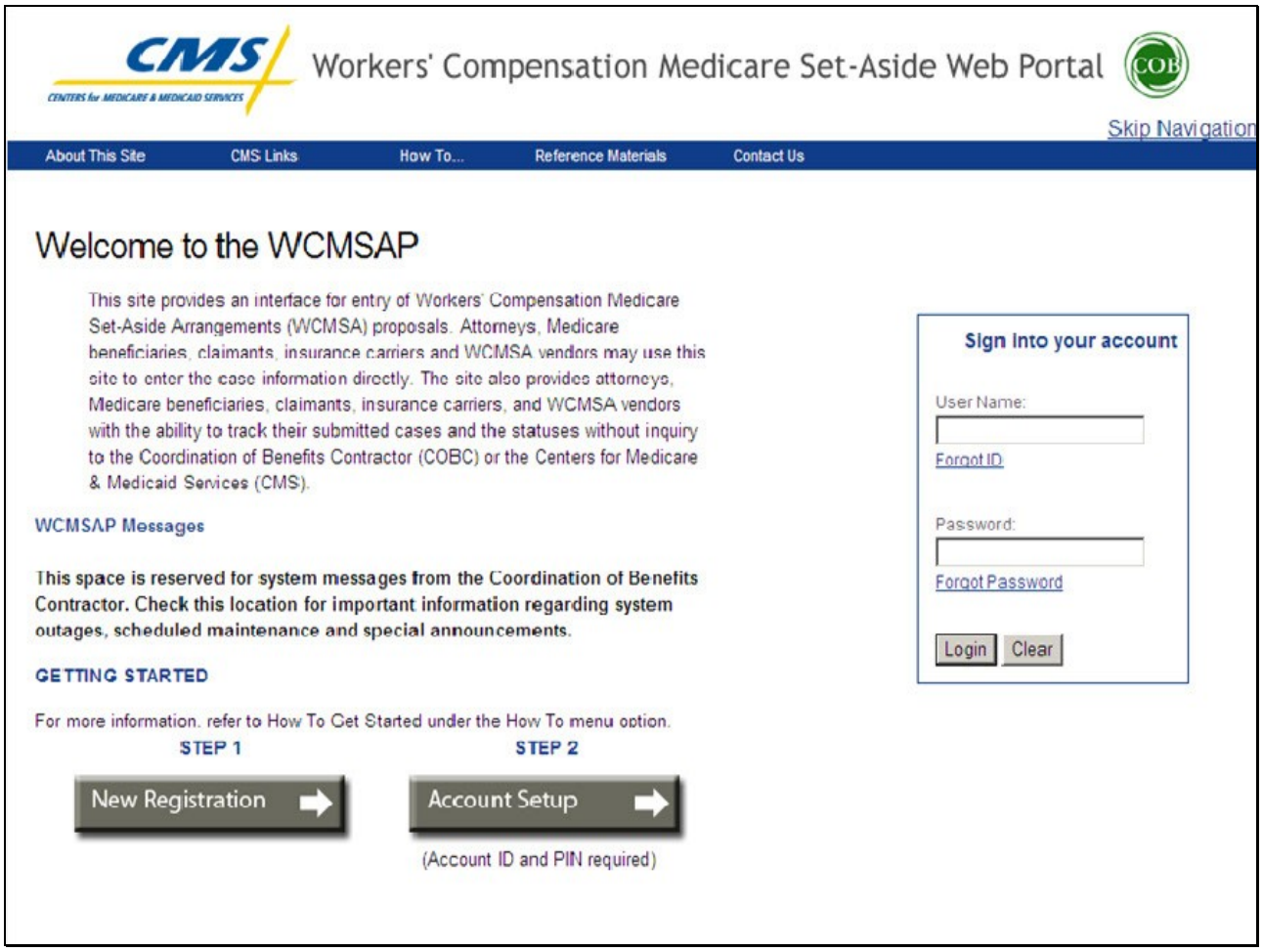

Slide notes

To access a WCMSAP account and manage the case submission process, the Account Manager must first successfully login to the WCMSAP application.

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Slide notes

After a successful logon, the WCMSAP Home page will display.

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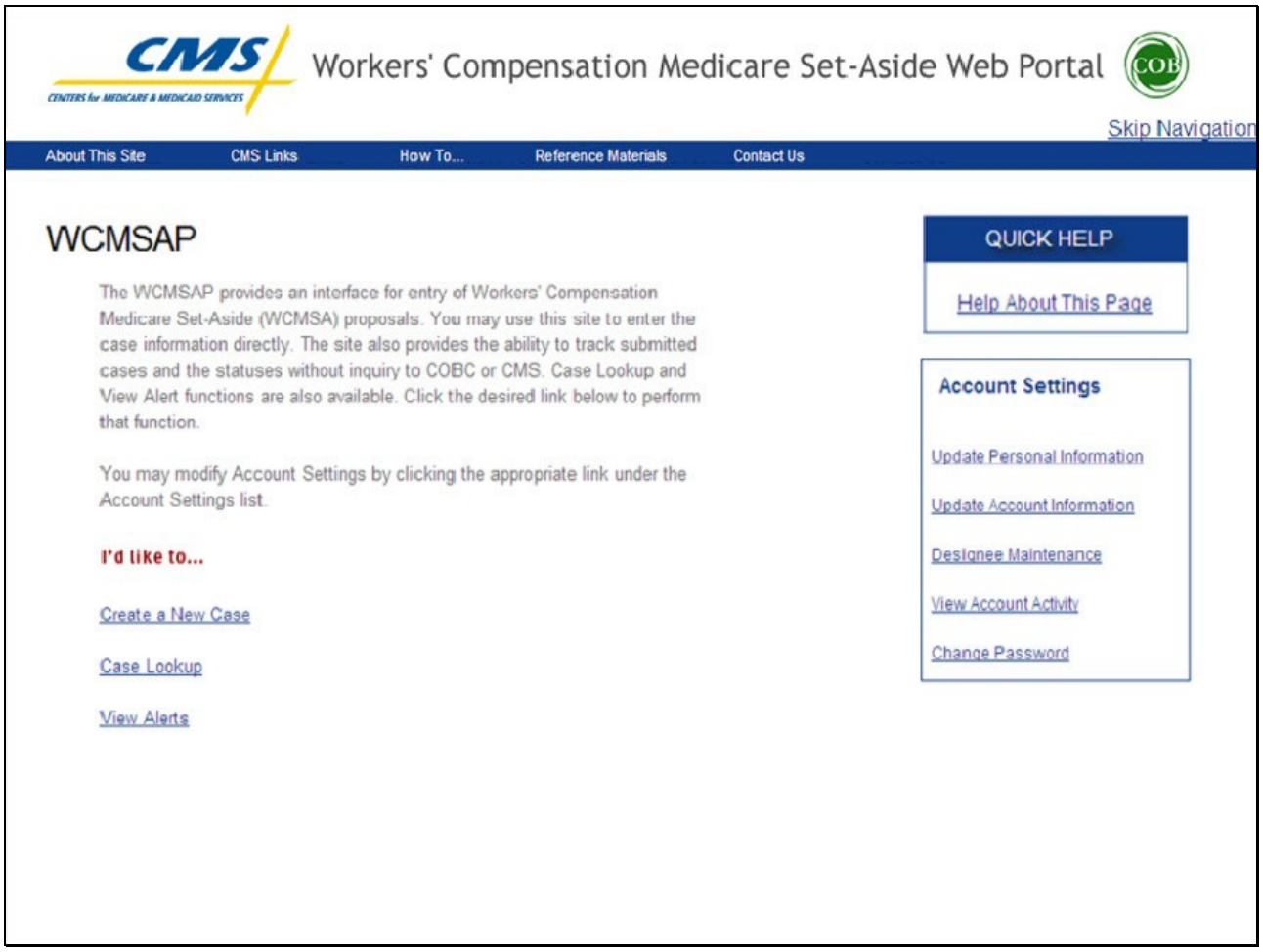

Slide notes

From this page, the Account Manager can manage cases and manage account access.

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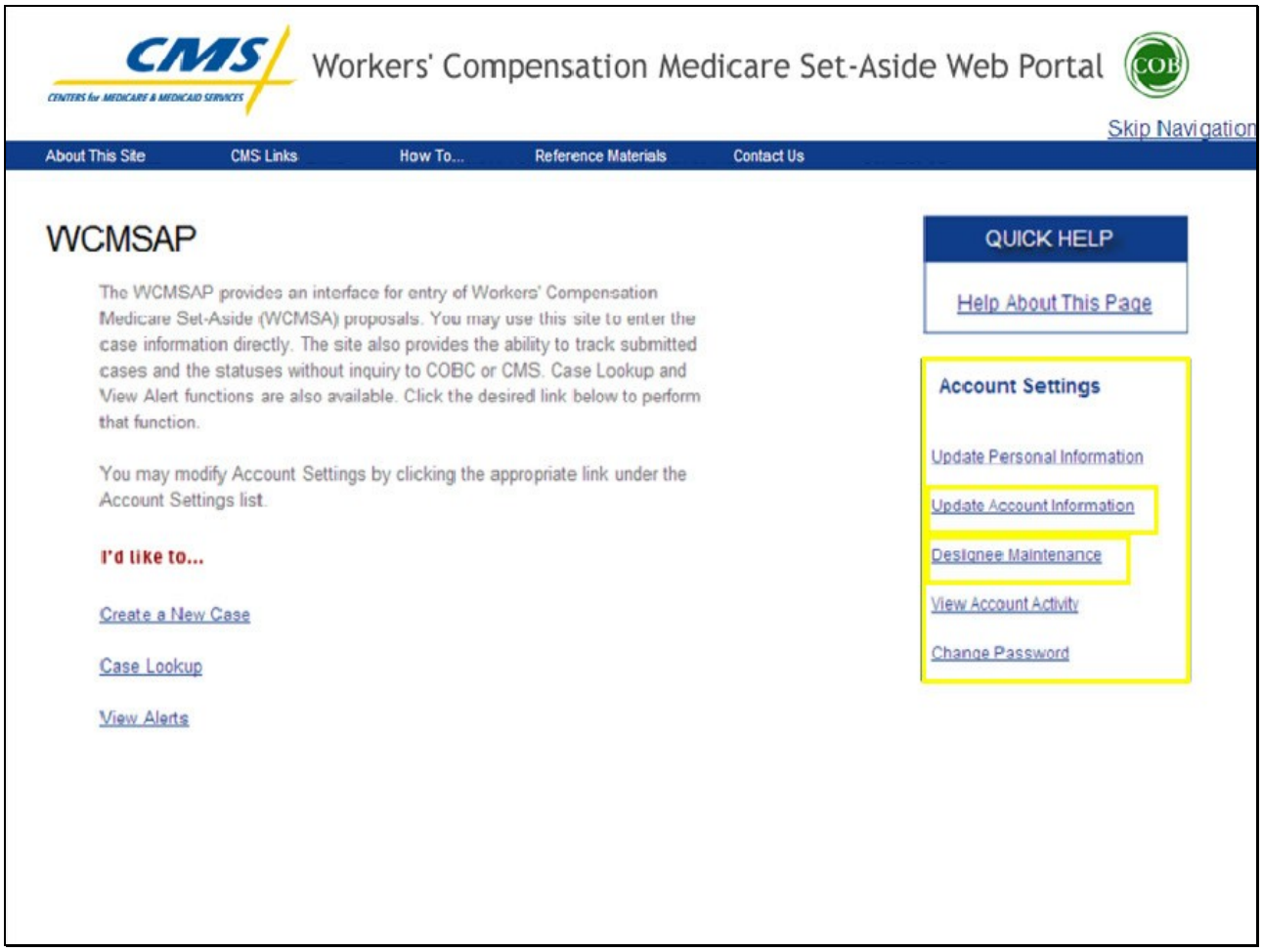

Slide notes

Case access is controlled through the Account Settings. Although Account Managers have access to all of the Account Settings, the focus of this CBT is on Update Account Information and Designee Maintenance.

For more information on the other Account Settings, please see the Login and User Maintenance CBT.

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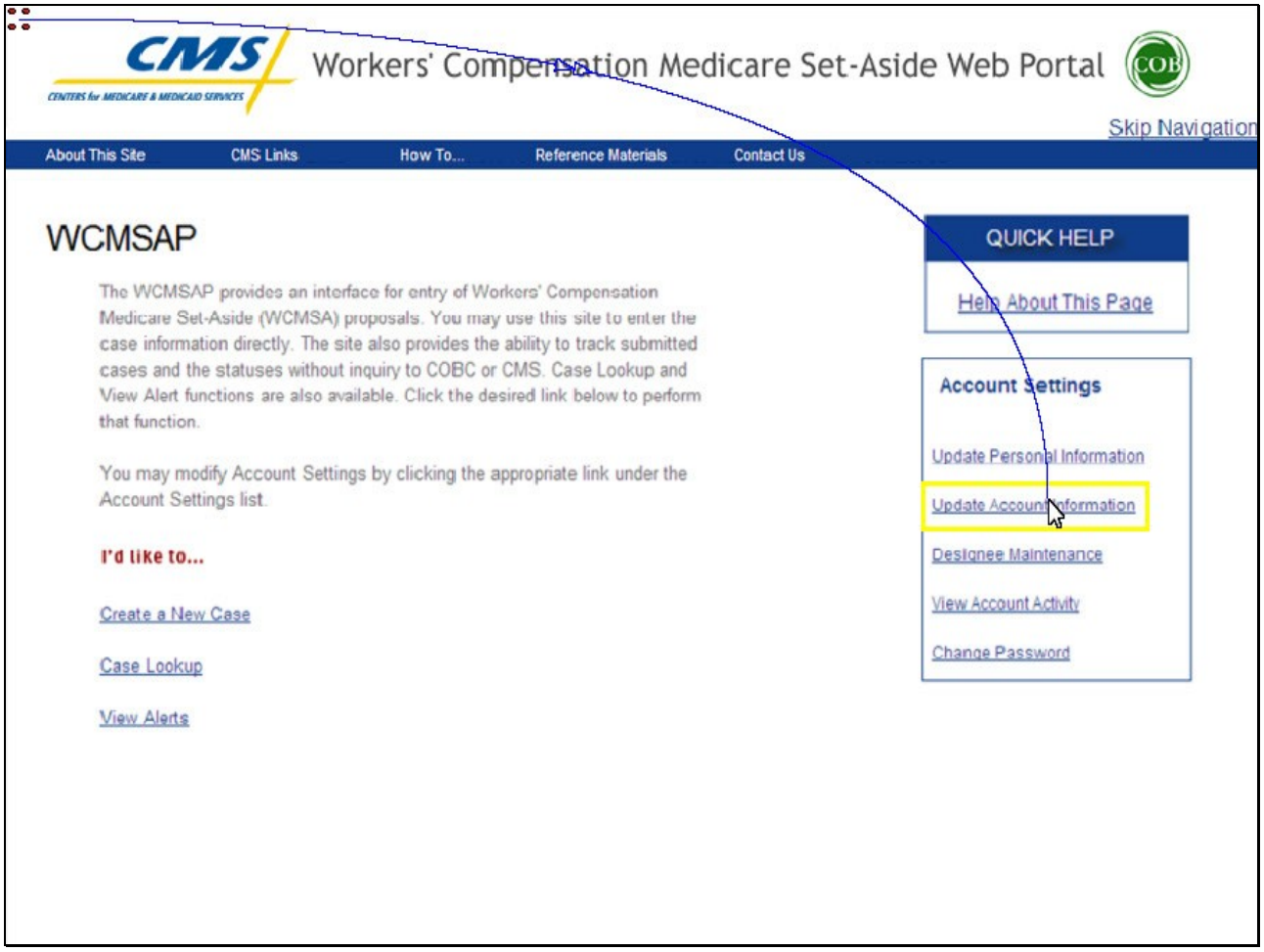

Slide notes

To revise account information, the Account Manager will click the Update Account Information link in the Account Settings box on the Home page.

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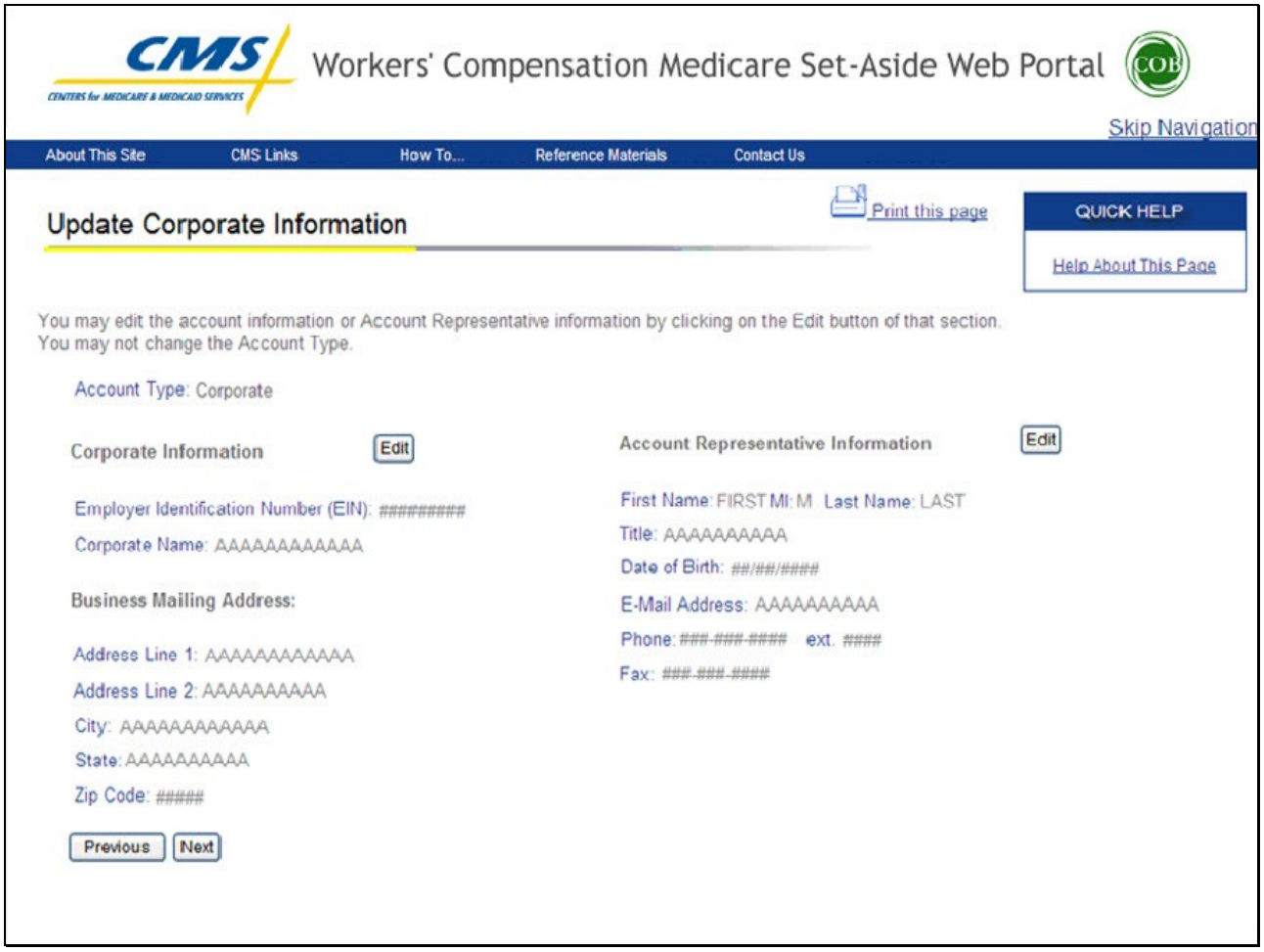

Slide notes

When the Update Account Information link is clicked, an Update Information page will display.

The one pictured here, Update Corporate Information page, is what will display for Corporate users. This page lists the account's mailing address, and Account Representative contact information.

Please note: The Update Information screens for Representative and Self account types are very similar and function the same way.

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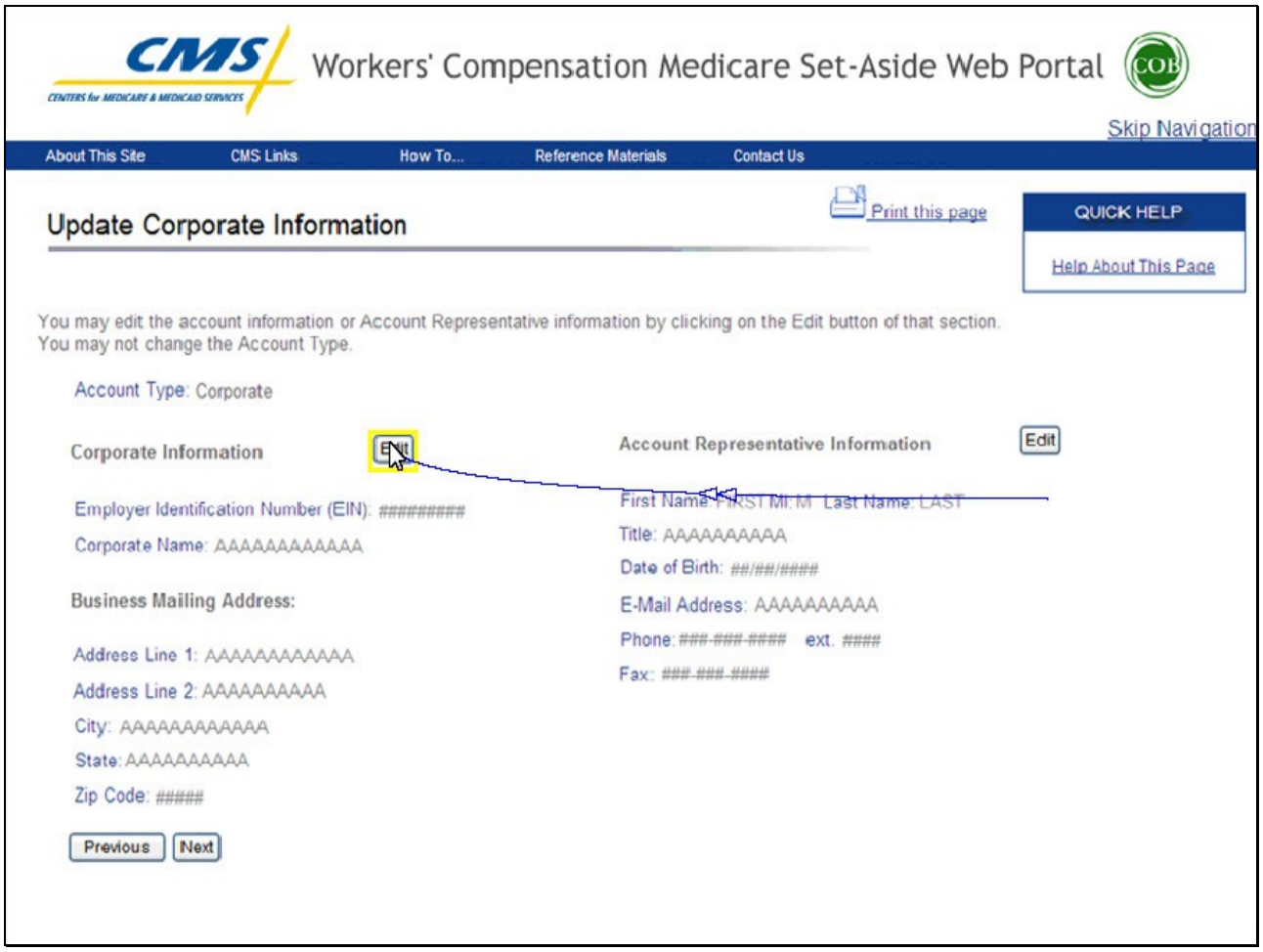

Slide notes

To make any corrections, click the Edit button next to the section that requires revisions to return to that page.

Note: If the Account Manager needs to replace their Account Representative with another person, they may do so by editing the Account Representative Information page.

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CMS CENTERS for MEDICARE & MEDICAID SERVICES

Workers' Compensation Medicare Set-Aside Web Portal

COB

Skip Navigation

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

Corporate Information

An asterisk (*) indicates a required field.

QUICK HELP

Help About This Page

Employer Identification Number (EIN): *

Corporation Name: *

Business Mailing Address:

Address Line 1: *

Address Line 2:

City: *

State: * - Select -

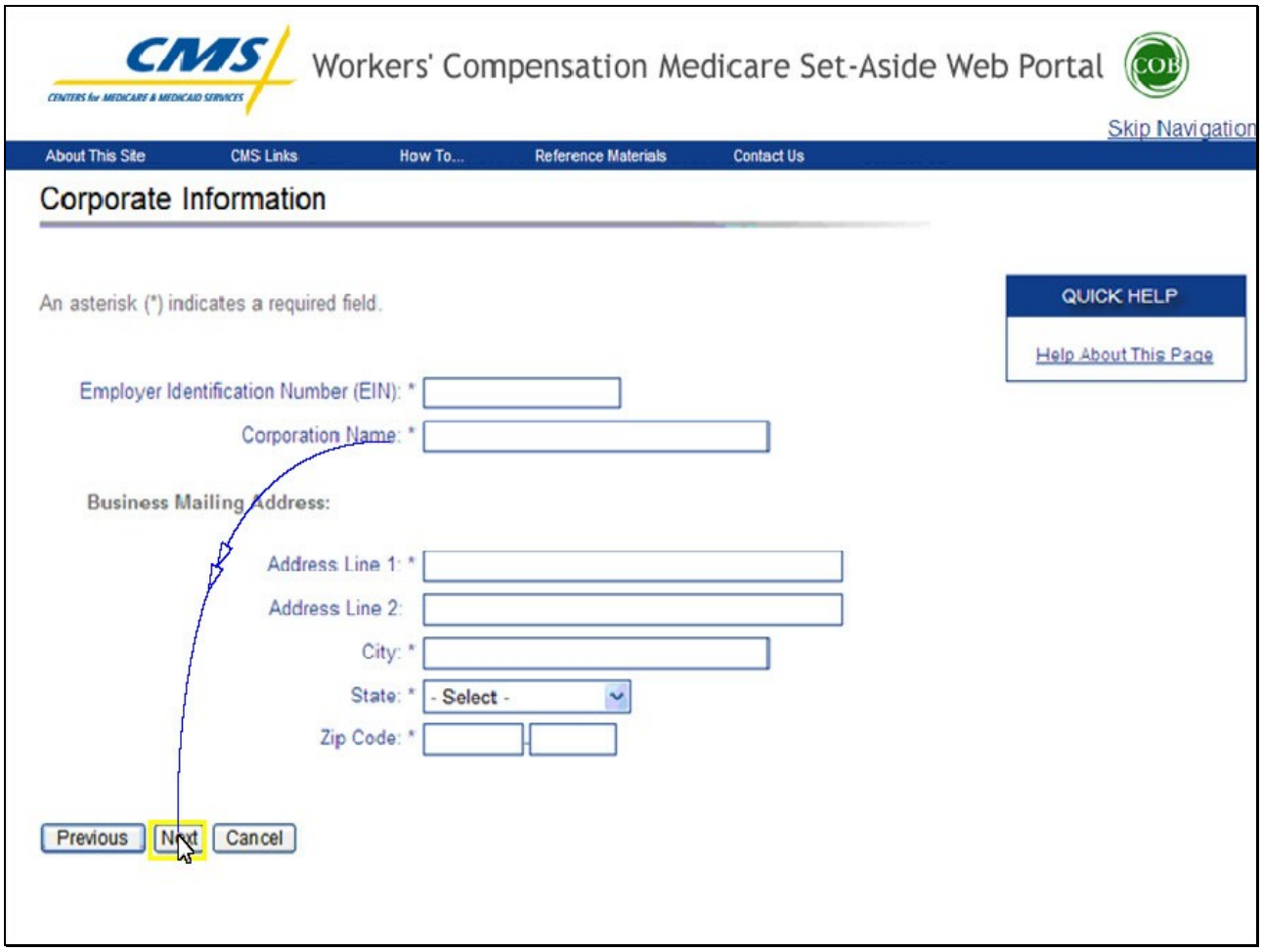
Zip Code: *

Previous | Next | Cancel

Slide notes

Change or correct any of the information as needed.

Slide 15 - of 53



Slide notes

Once all corrections have been made, click Next at the bottom of the page to navigate back to the Update Corporate Information page.

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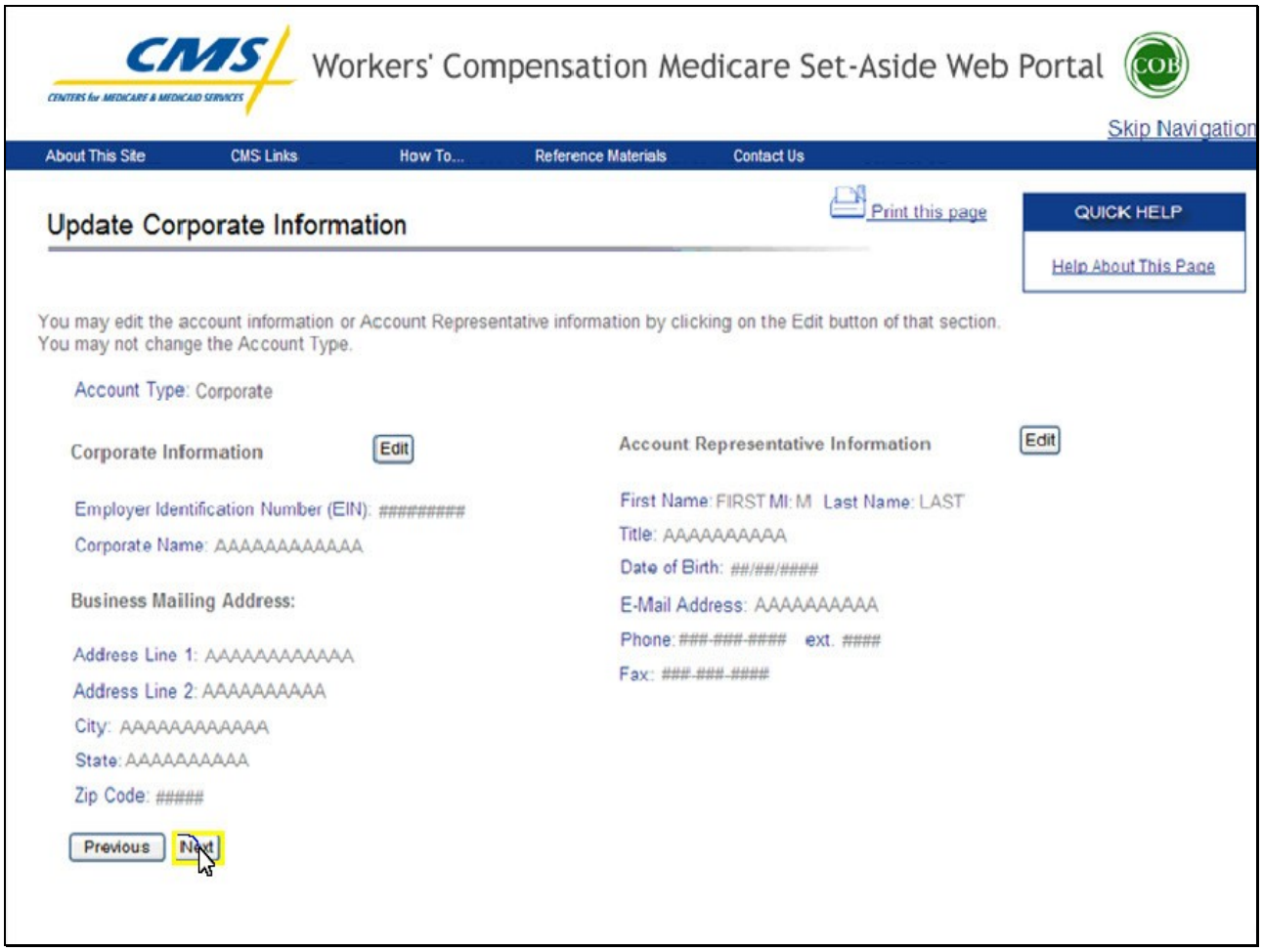
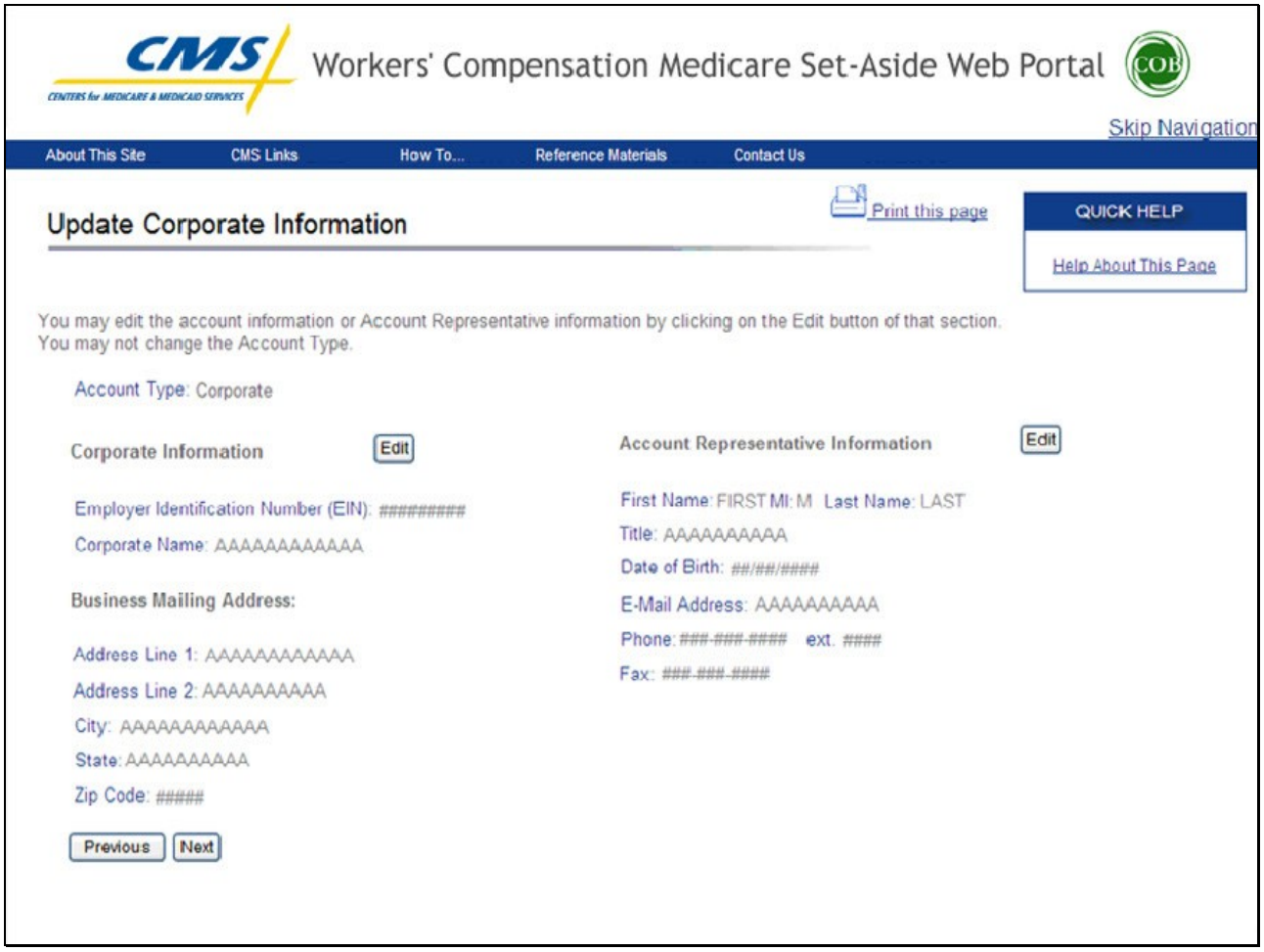


Slide notes

After you have returned to the Update Information page, click the Next button.

Slide 17 - of 53



Slide notes

The system will display a warning message when a change is made to the WCMSAP account information indicating that the updated information will be used for all future official communications.

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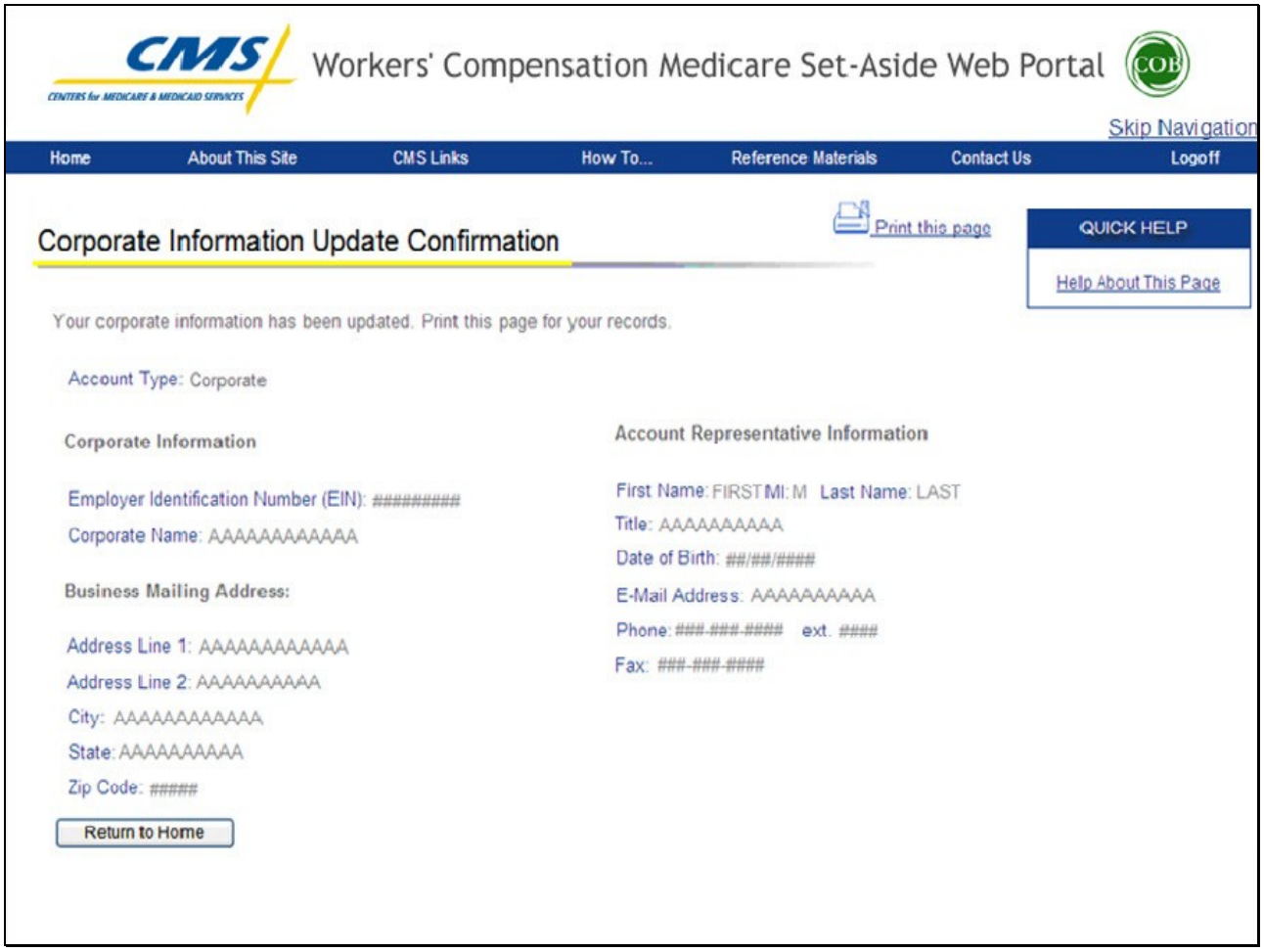

Slide notes

Next, the system will display the Corporate Information Update Confirmation page, showing the updated information.

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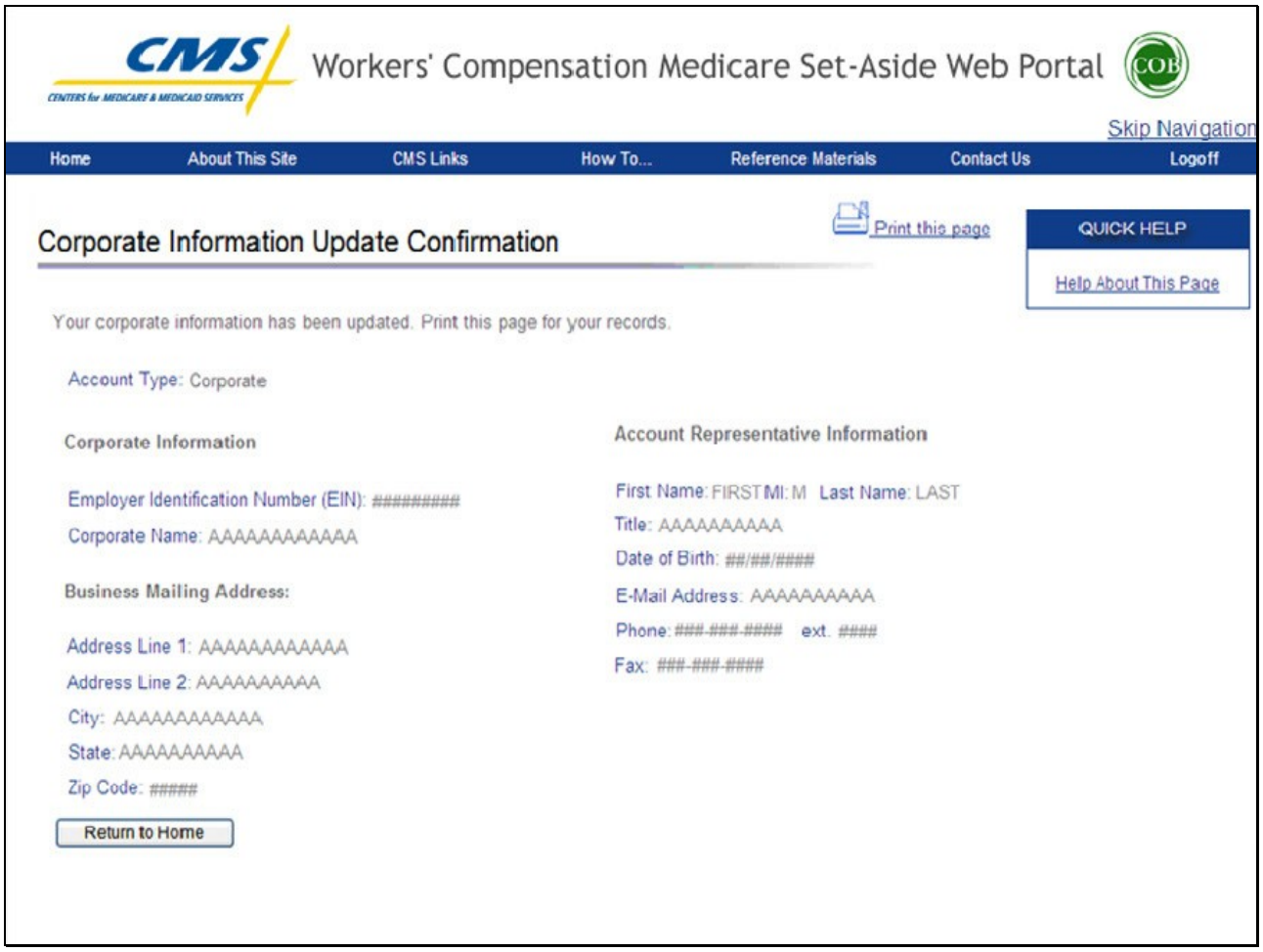

Slide notes

With the exception of a modification to an e-mail address, the system will send an e-mail to the Account Manager, indicating that the account information has been changed.

Included in the e-mail notification will be a profile report.

The Account Manager will be instructed to notify the COBC if they did not initiate the update.

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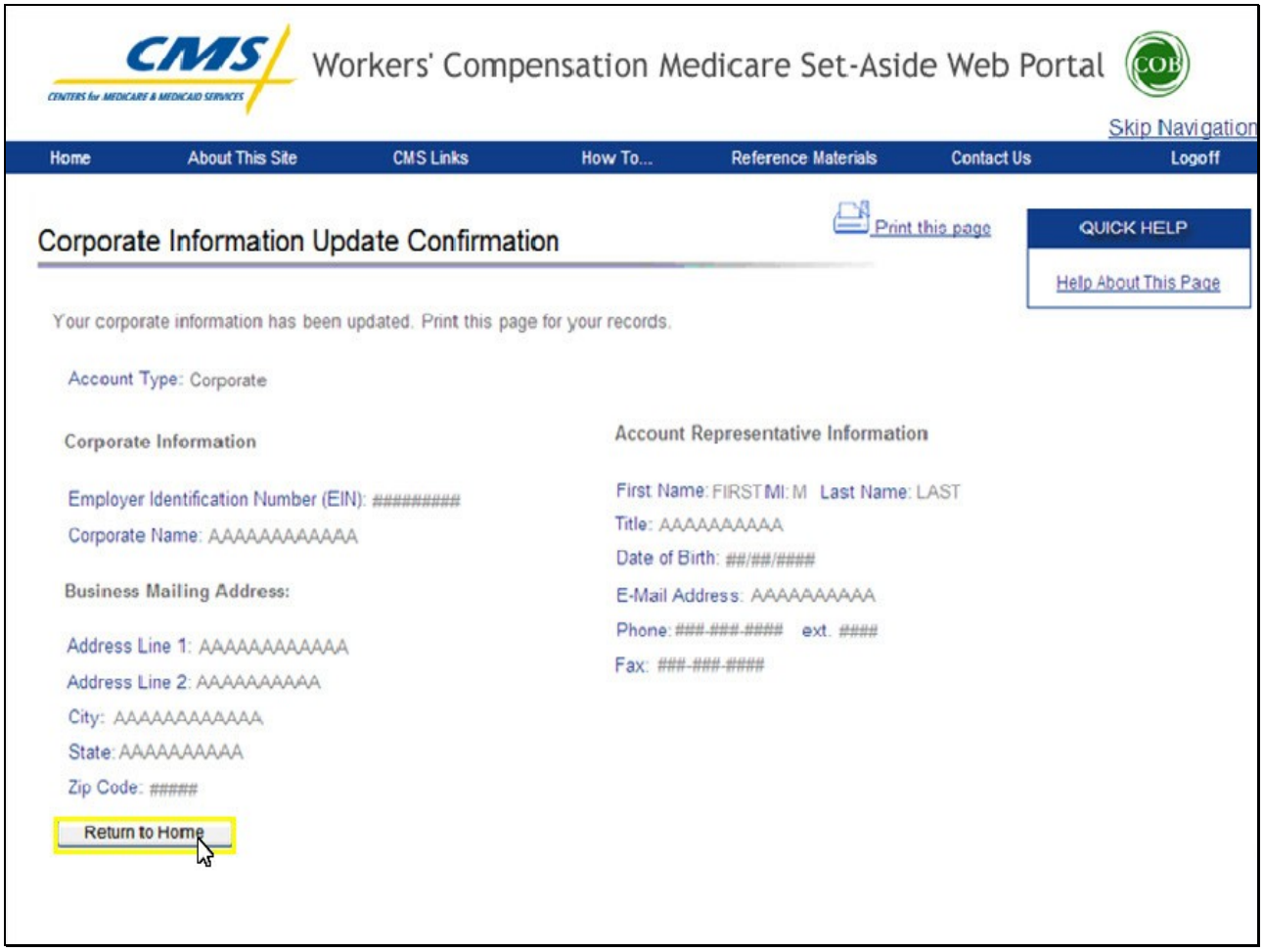

Slide notes

Click the Return to Home button to return to the WCMSAP Home page.

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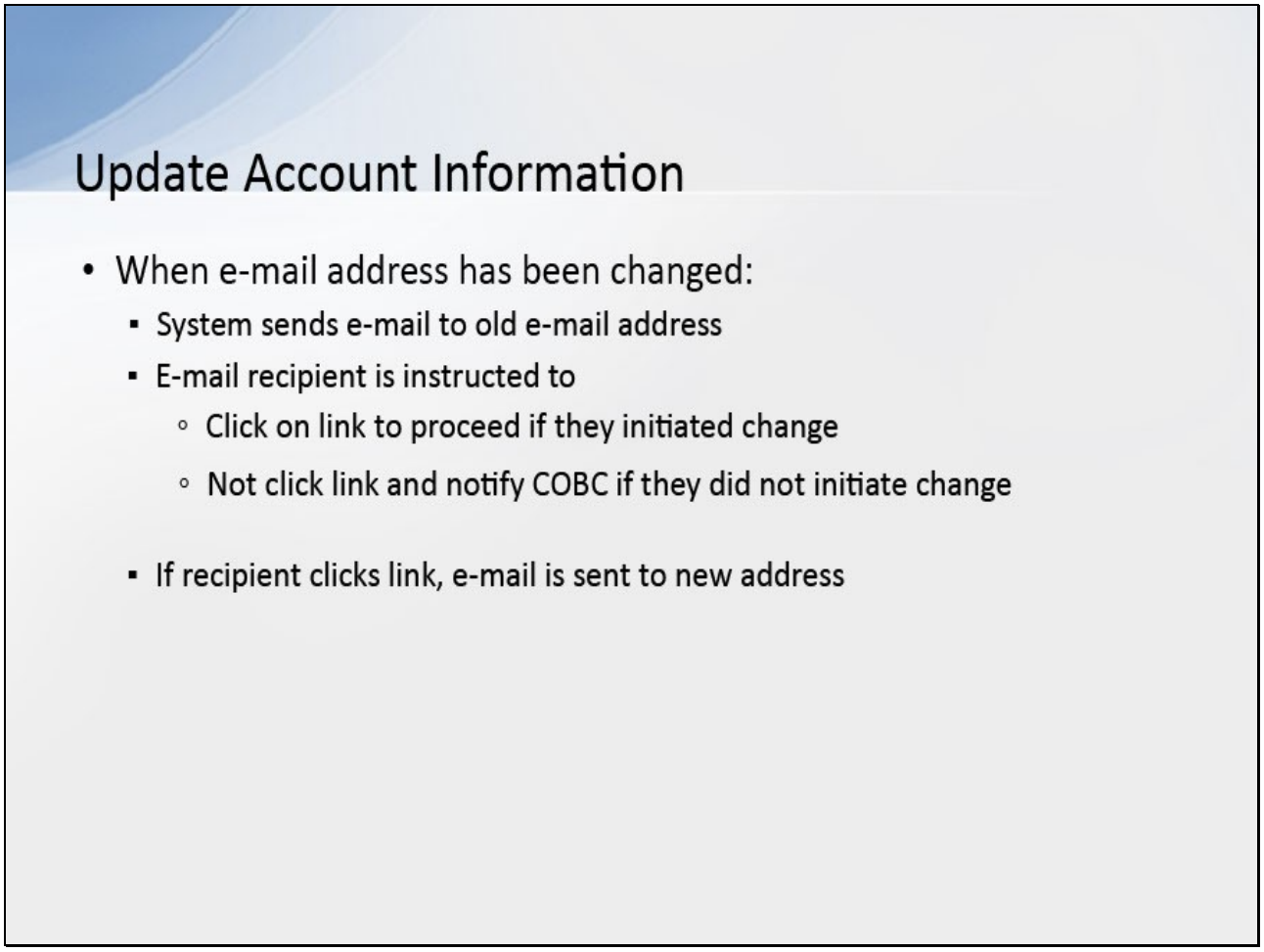


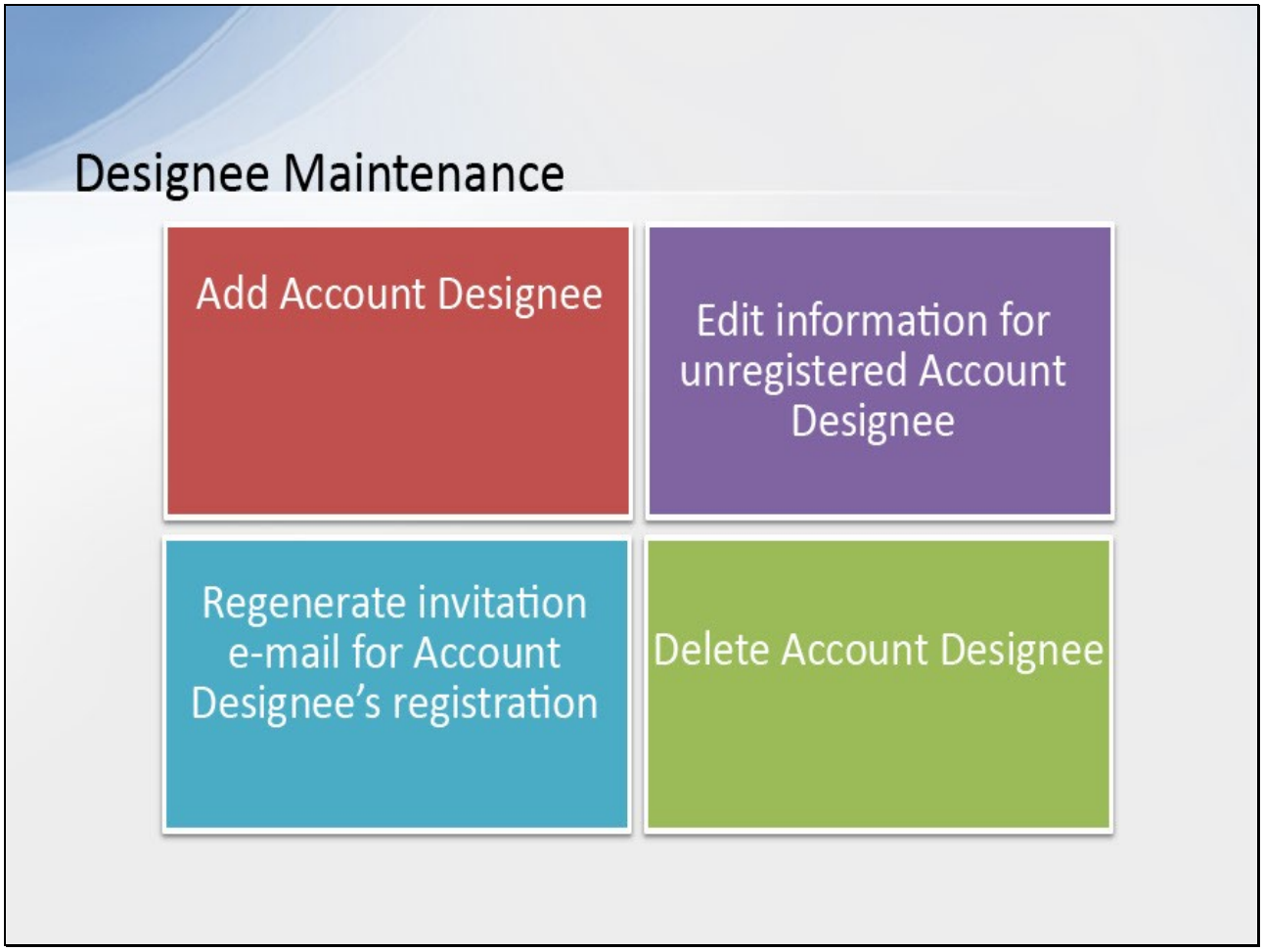
Slide notes

When an e-mail address has been changed, the system will: Send an e-mail to the old e-mail address stating that an e-mail address change has been requested.

The e-mail recipient will be instructed to click on a link to proceed with the change, but only if they initiated the change.

The recipient will be instructed not to click the link and to notify the COBC if they did not initiate the e-mail address change. If the recipient clicks the link, an e-mail reflecting the change will then be sent to the new e-mail address.

Slide 22 - of 53



Slide notes

For Corporate and Representative accounts, the Account Manager may designate one or more Account Designees to assist with case submission and management.

The Account Manager can perform the following Designee Maintenance functions:

Add an Account Designee, Edit information for an unregistered Account Designee, Regenerate an invitation e-mail with a token link for an Account Designee's registration, and Delete an Account Designee.

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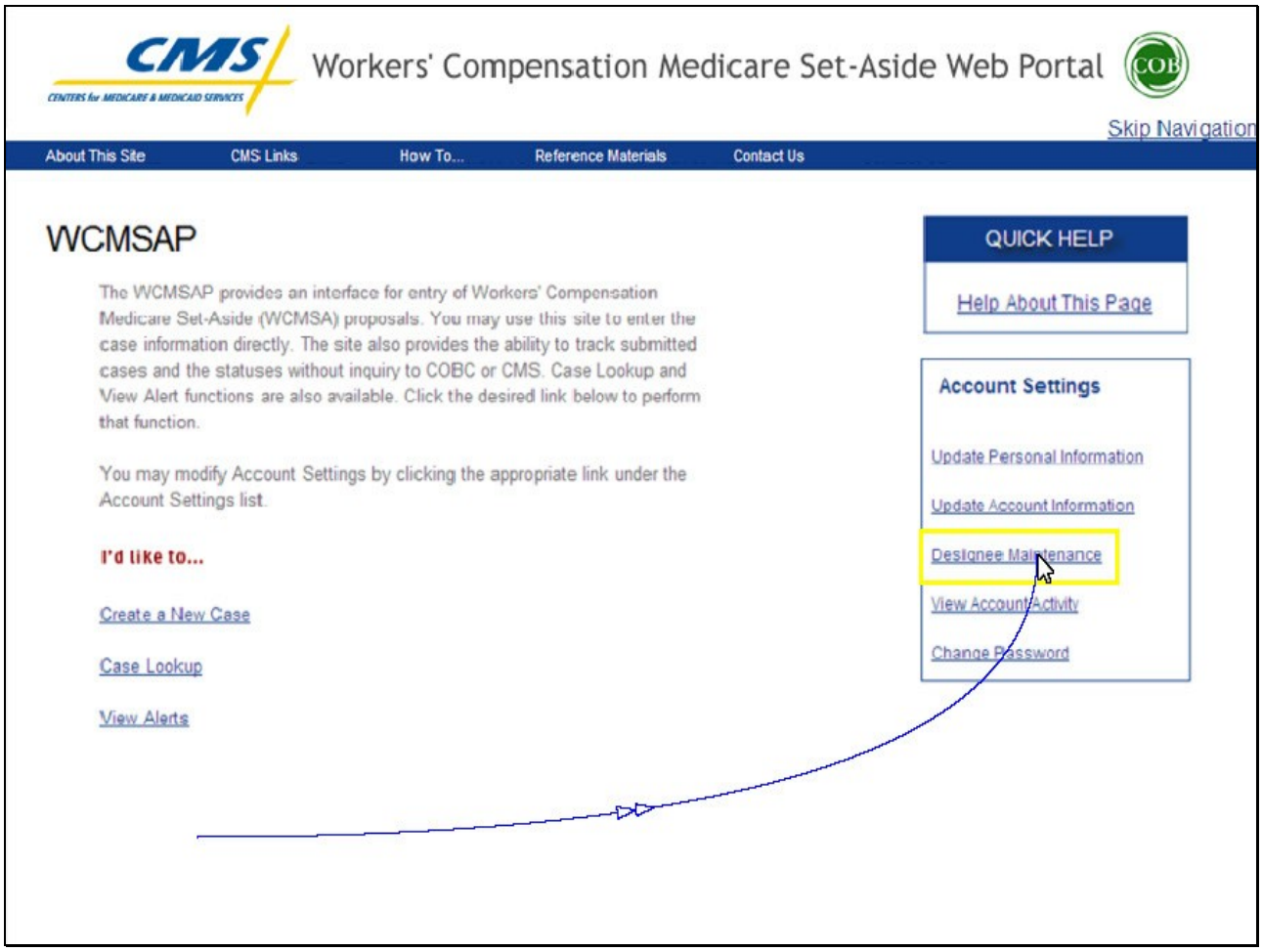

Slide notes

To manage Account Designees, the Account Manager will click the Designee Maintenance link from the Account Settings menu.

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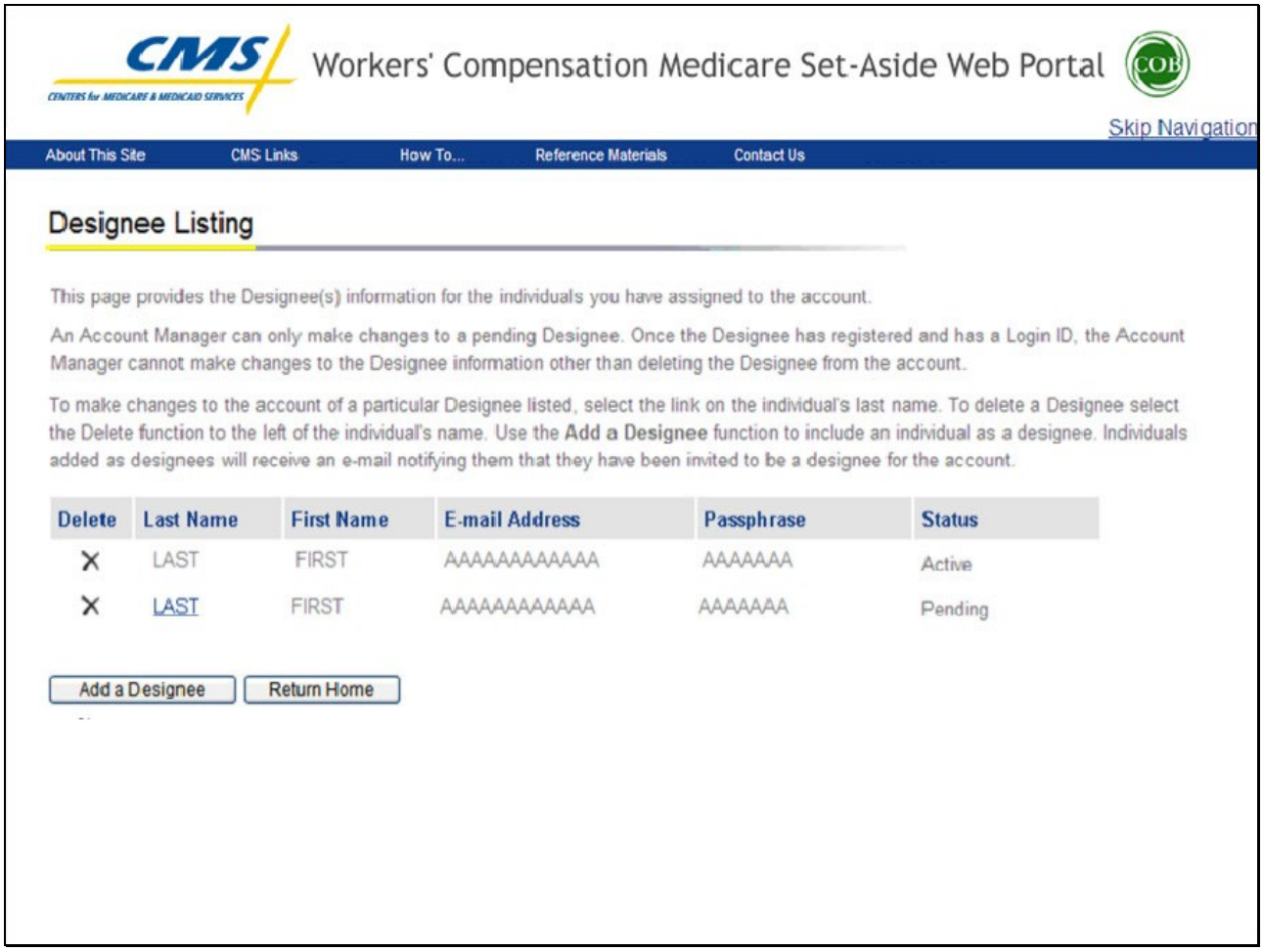

Slide notes

The Designee Listing page will display. All Designees and their associated statuses (Pending, Active, Locked, Expired, Revoked) will be listed.

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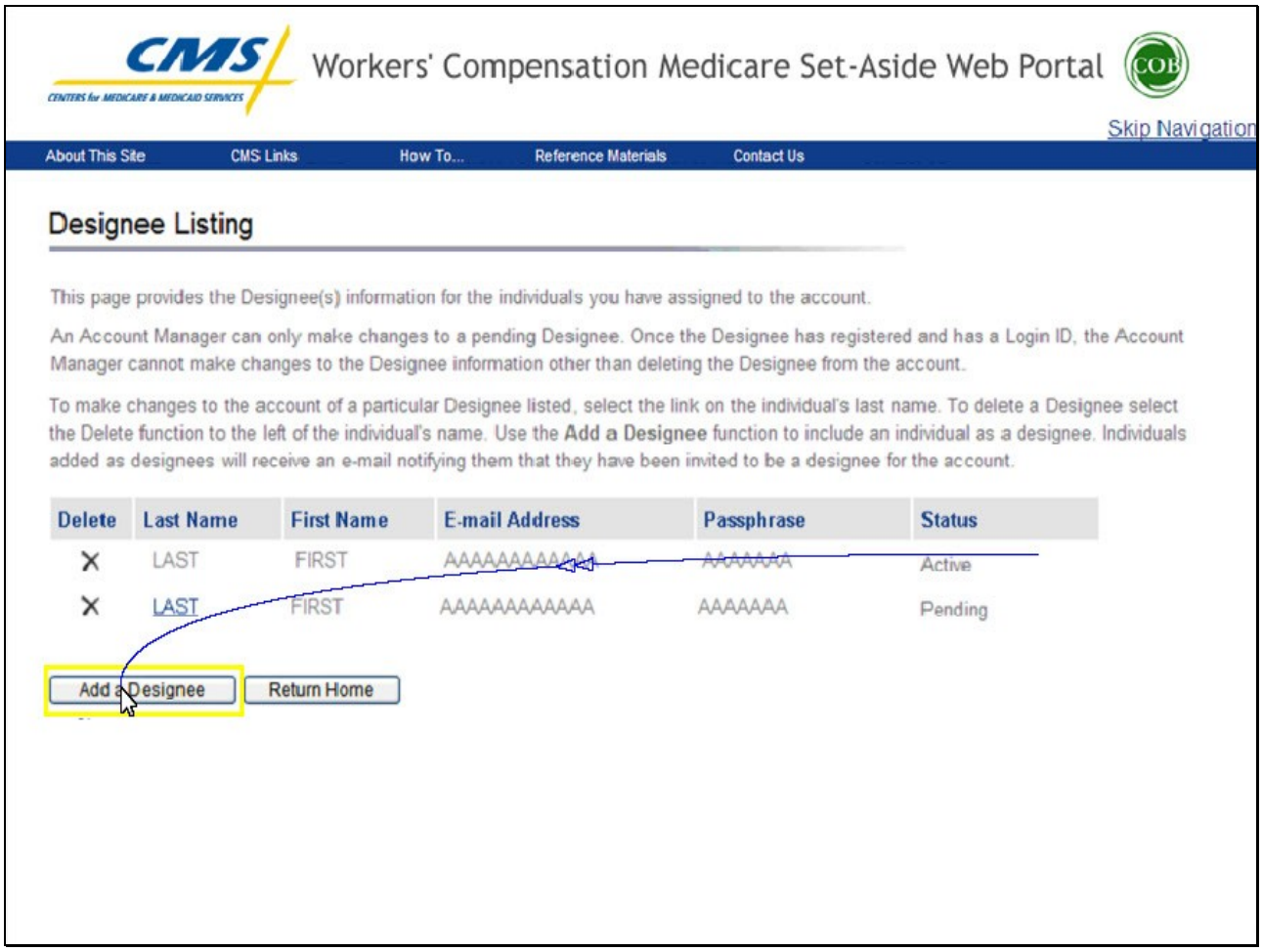

Slide notes

To add a potential Account Designee, the Account Manager must first invite them. To initiate this process, click Add a Designee.

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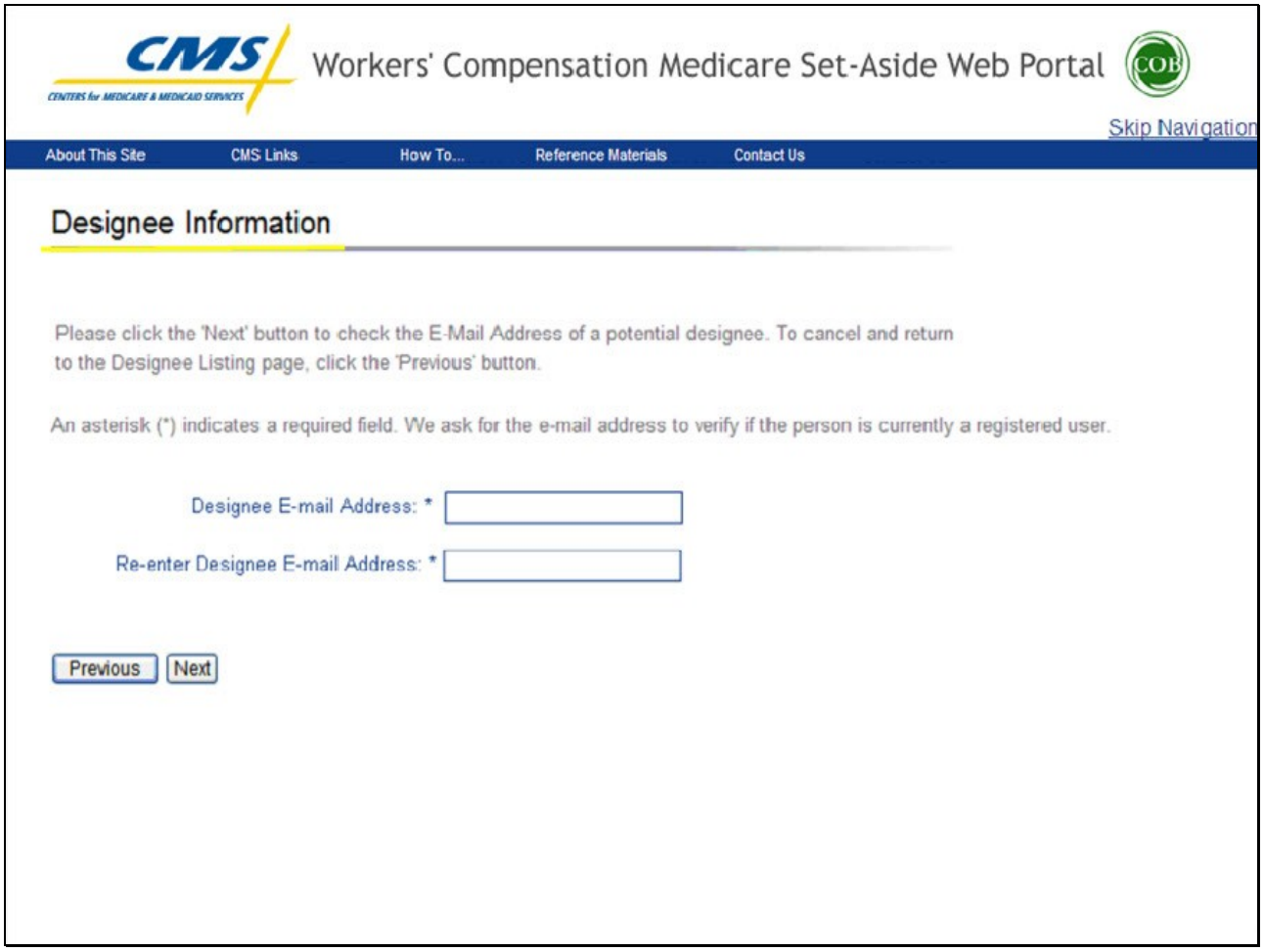
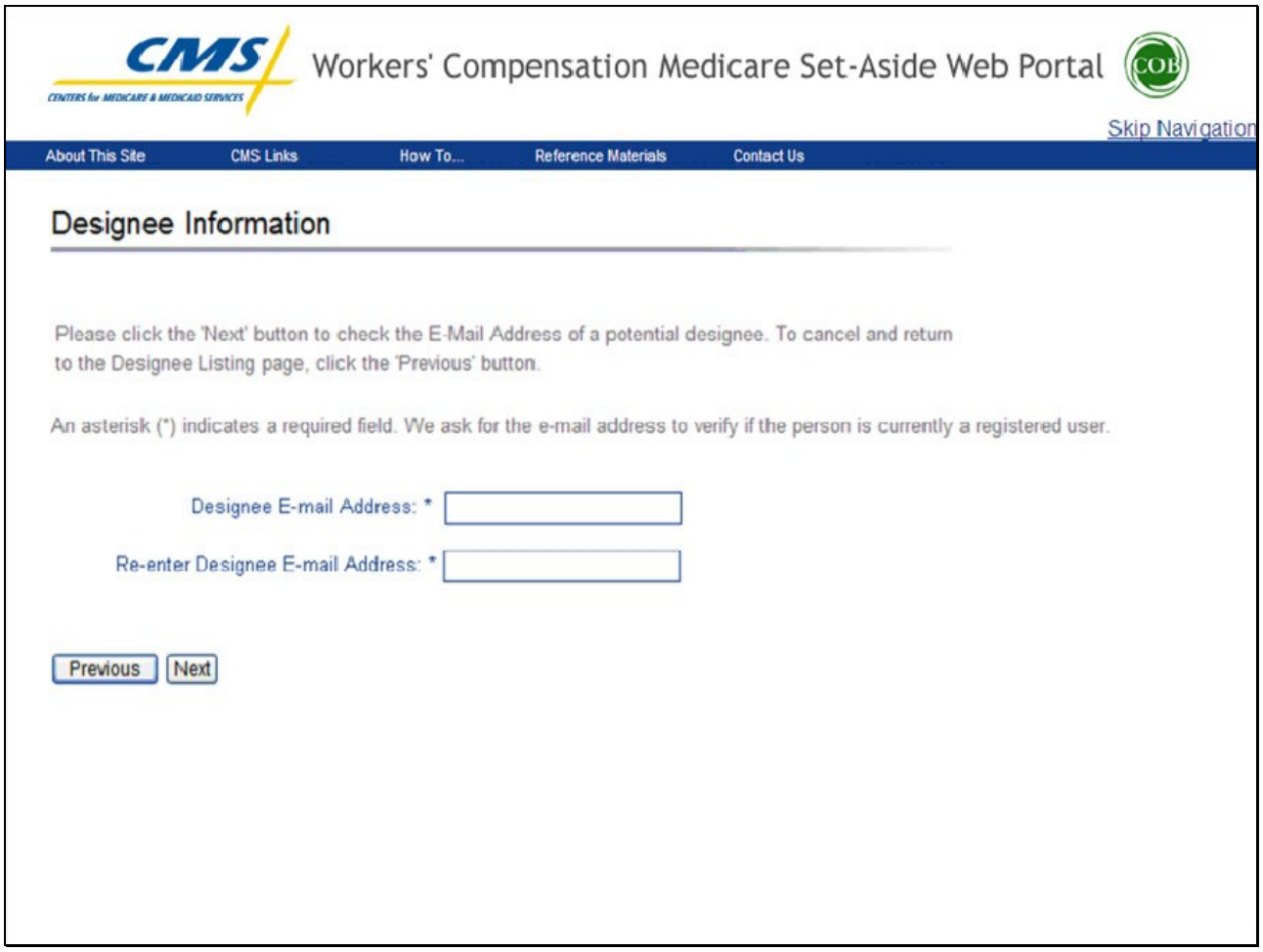


Slide notes

The Designee Information page displays.

Slide 27 - of 53



Slide notes

The Account Manager will enter and re-enter the e-mail address of the Account Designee they wish to invite and then click Next to continue.

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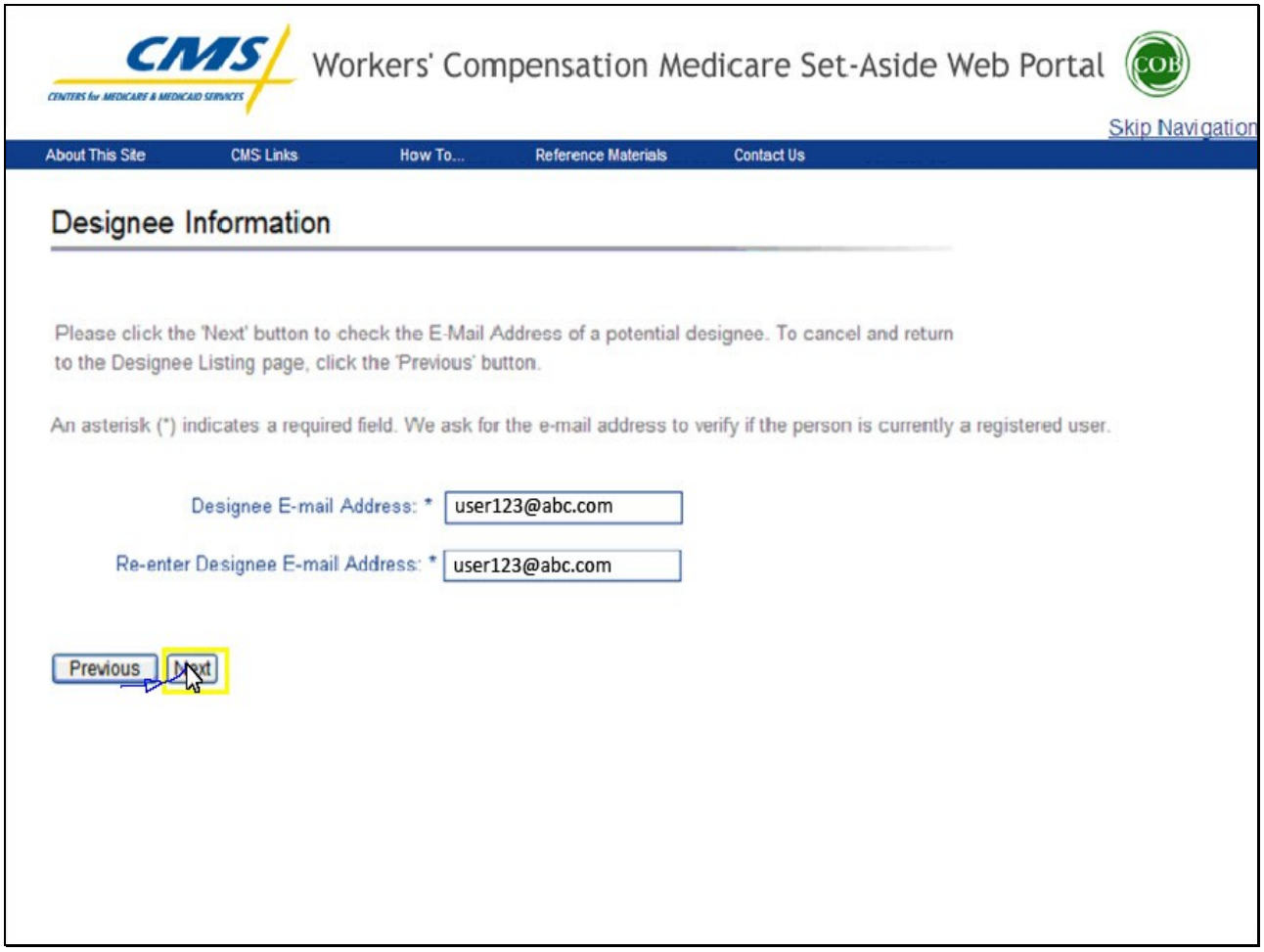
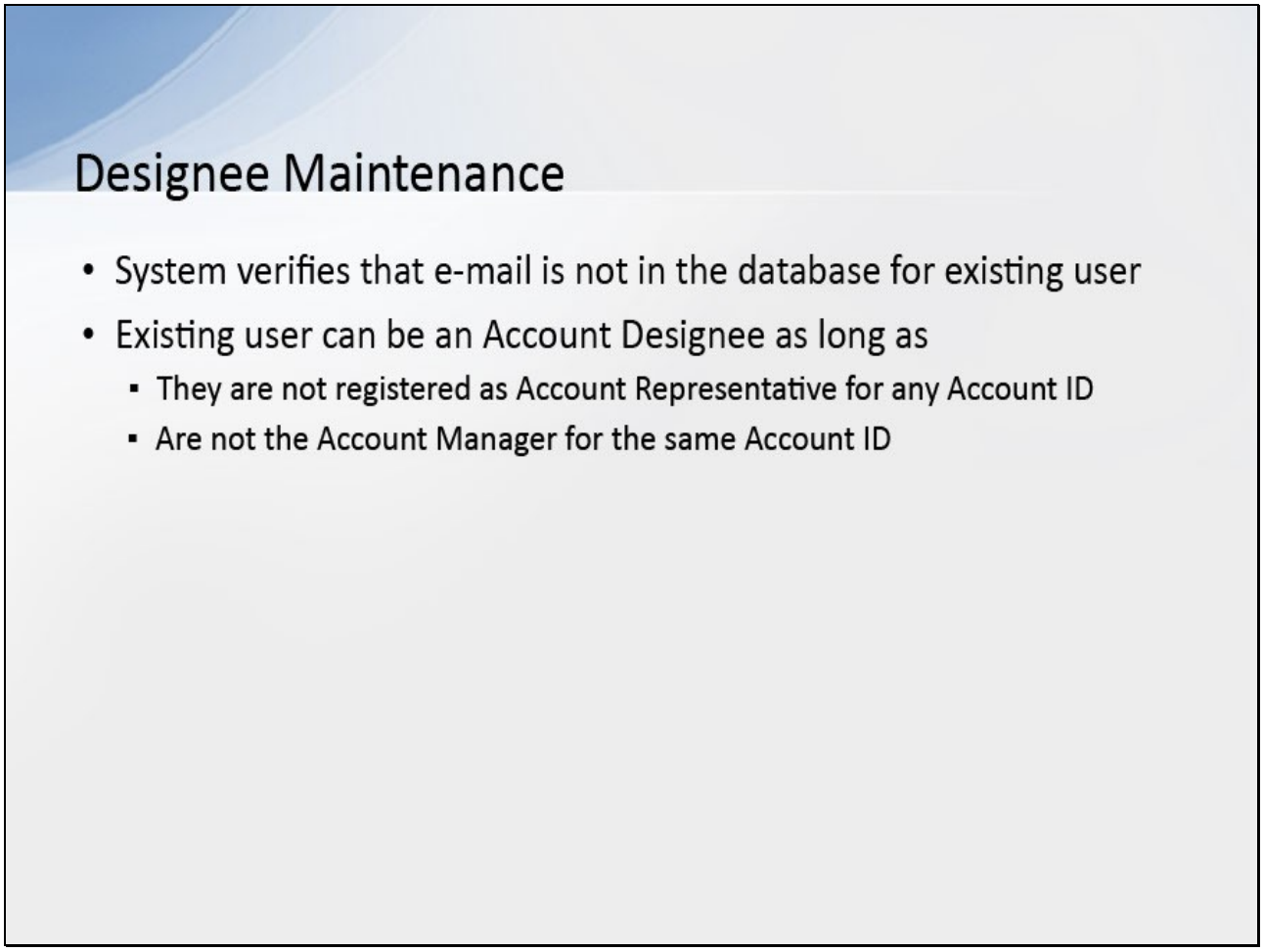


Slide notes

Slide 29 - of 53



Slide notes

When Next is clicked, the system will verify that the entered e-mail address is not in the database for an existing user.

An existing, registered user can be an Account Designee for your Account ID as long as they are not already registered as an Account Representative for any Account ID, or the Account Manager for the same Account ID.

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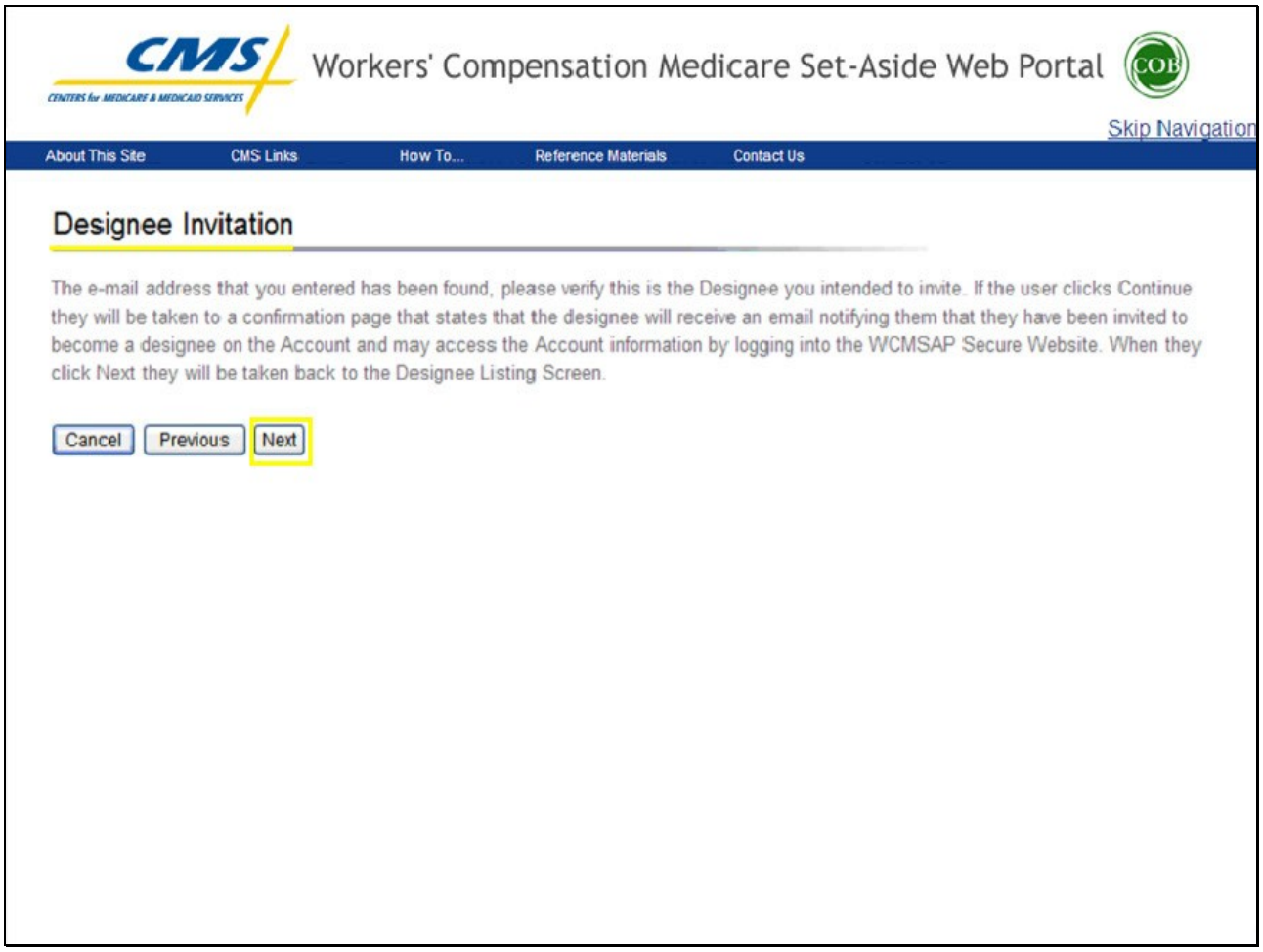

Slide notes

If the entered e-mail address is found in the system (i.e., the invited Account Designee is already a registered user), the Designee Invitation page displays.

The Account Manager must verify and confirm that the information entered is for the correct Designee by clicking Next.

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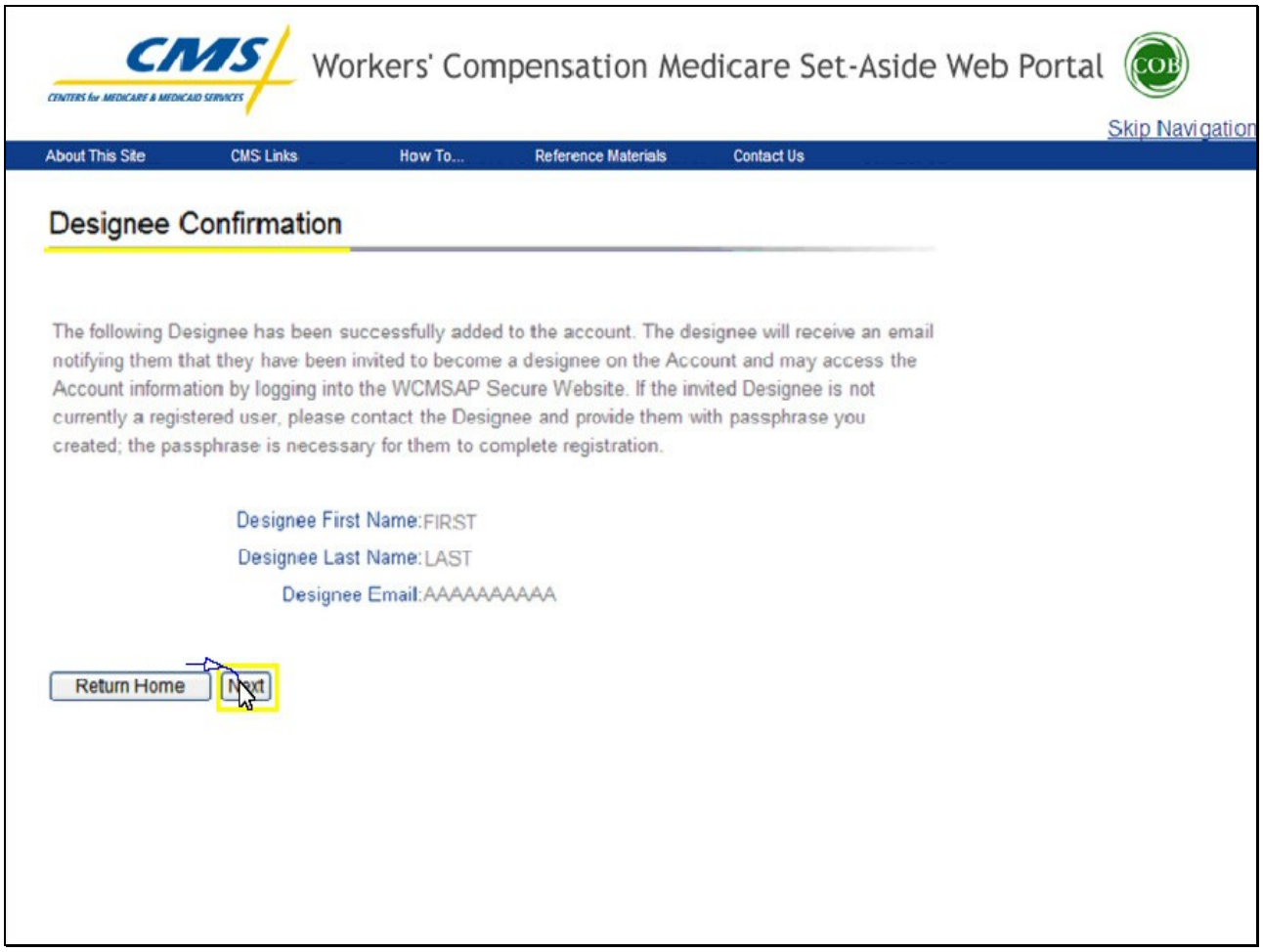

Slide notes

The Designee Confirmation page will display. This page confirms that the invited Designee has been added to the account. The Designee will be sent an e-mail notifying them that they have been added to the Account ID. Click Next to continue.

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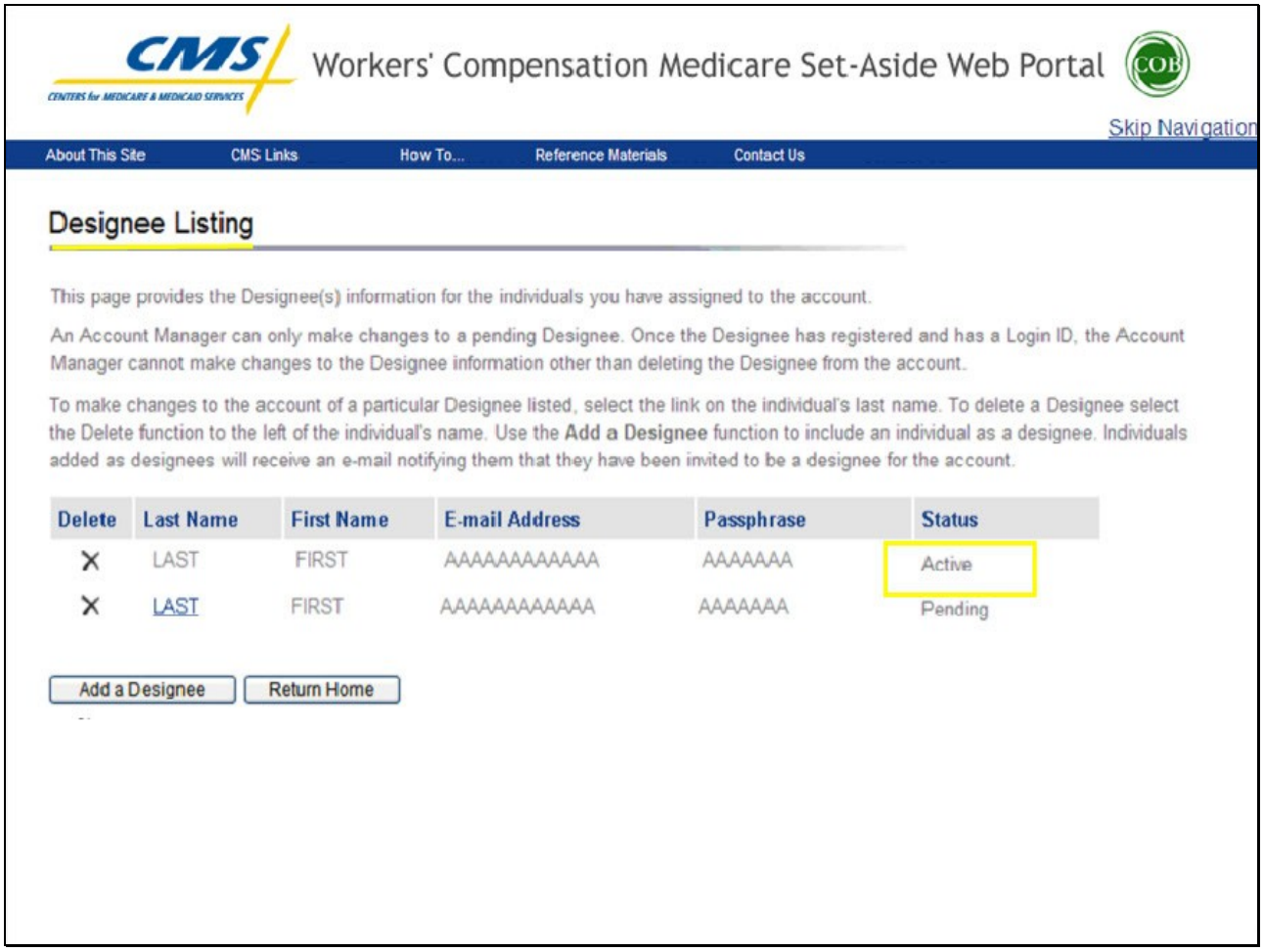

Slide notes

The Designee Listing page will re-display. The new Designee will be listed with an “Active” Status.

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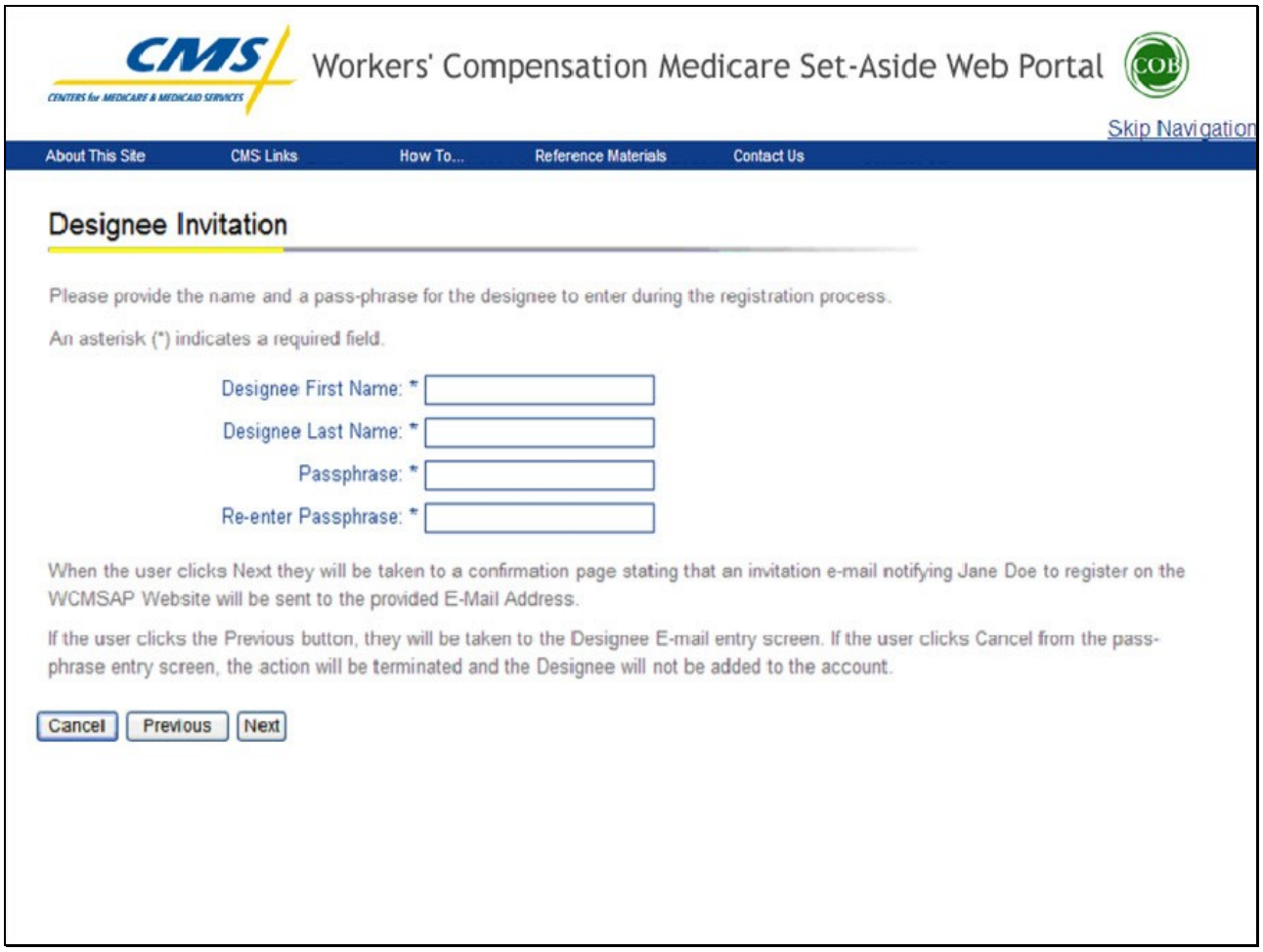

Slide notes

If the Designee that is being invited is not a registered user (i.e., the entered e-mail address is NOT found in the system), the Designee Invitation page will display.

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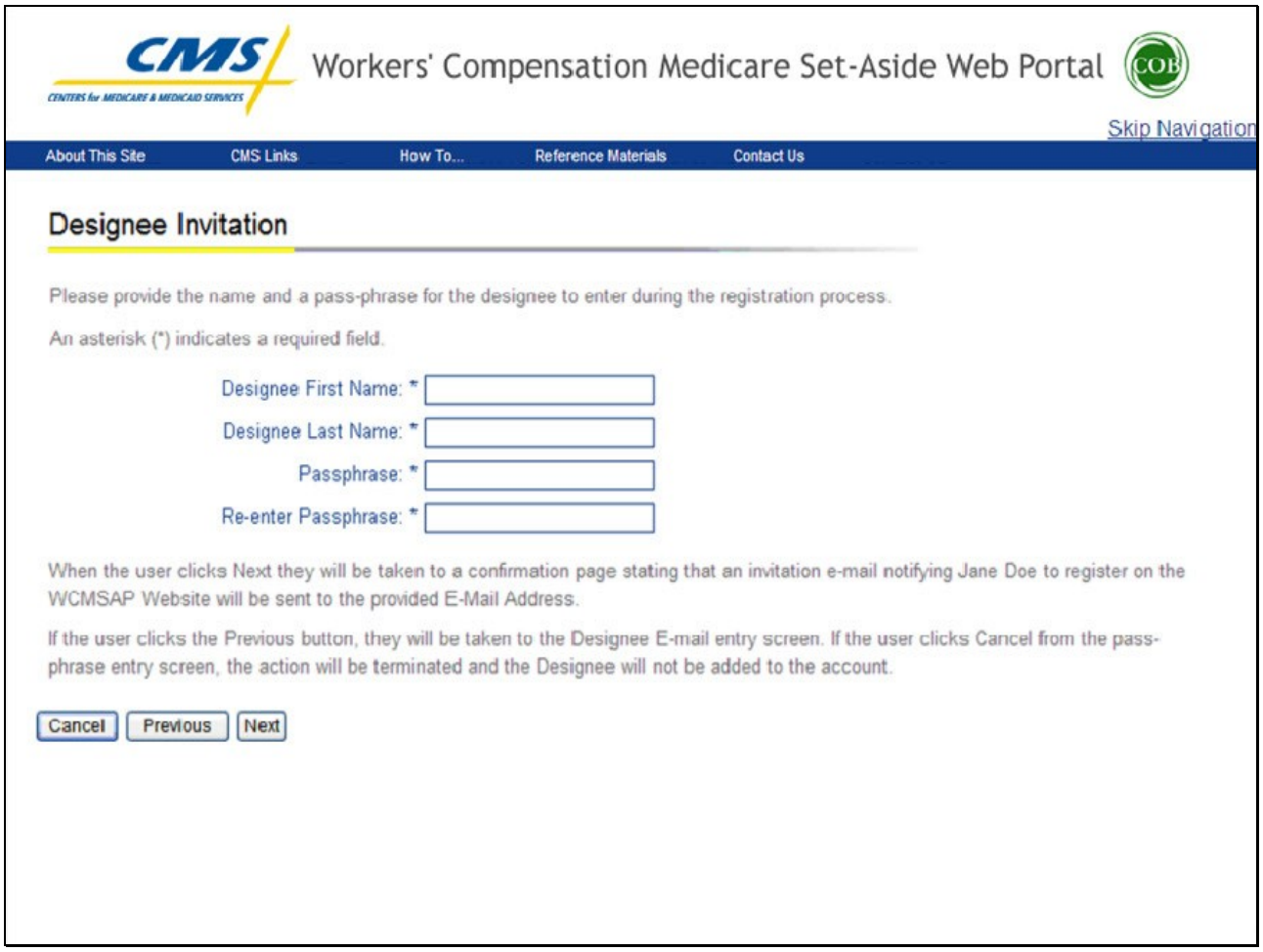

Slide notes

Unregistered individuals must first be invited to be an Account Designee before they can become an Account Designee.

When the Designee Invitation page displays, the Account Manager must enter the First and Last Name for the individual they are inviting to be an Account Designee, and create a Passphrase (a short, case-sensitive phrase, up to 30 characters). The Passphrase is entered twice.

The Account Manager must contact their Account Designee and provide them with the Passphrase. The Account Designee will need this passphrase in order to register.

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Designee Maintenance

- Individual being invited as Account Designee will receive an e-mail notifying them of invitaion
- Invitation e-mail will come from cobva@ghimedicare.com
  - Account Manager should inform Designee to allow e-mail deliveries from this address
- When Account Designee receives invitation e-mail, they must click on the link provided and enter Passphrase
- Once registration is complete, they will be able to access this Account ID

Slide notes

Once the invitation process is complete, the individual being invited as an Account Designee will receive an e-mail notifying them that they have been invited to be an Account Designee for the account.

The invitation e-mail will come from cobva@ghimedicare.com. The Account Manager should inform the Designee to allow e-mail deliveries from this address.

When the Account Designee receives the invitation e-mail, they must click on the link provided in the e-mail and enter the Passphrase that the Account Manager provided them with in order to successfully register for the WCMSAP.

Once the registration has been completed, they will be able to access this Account ID.

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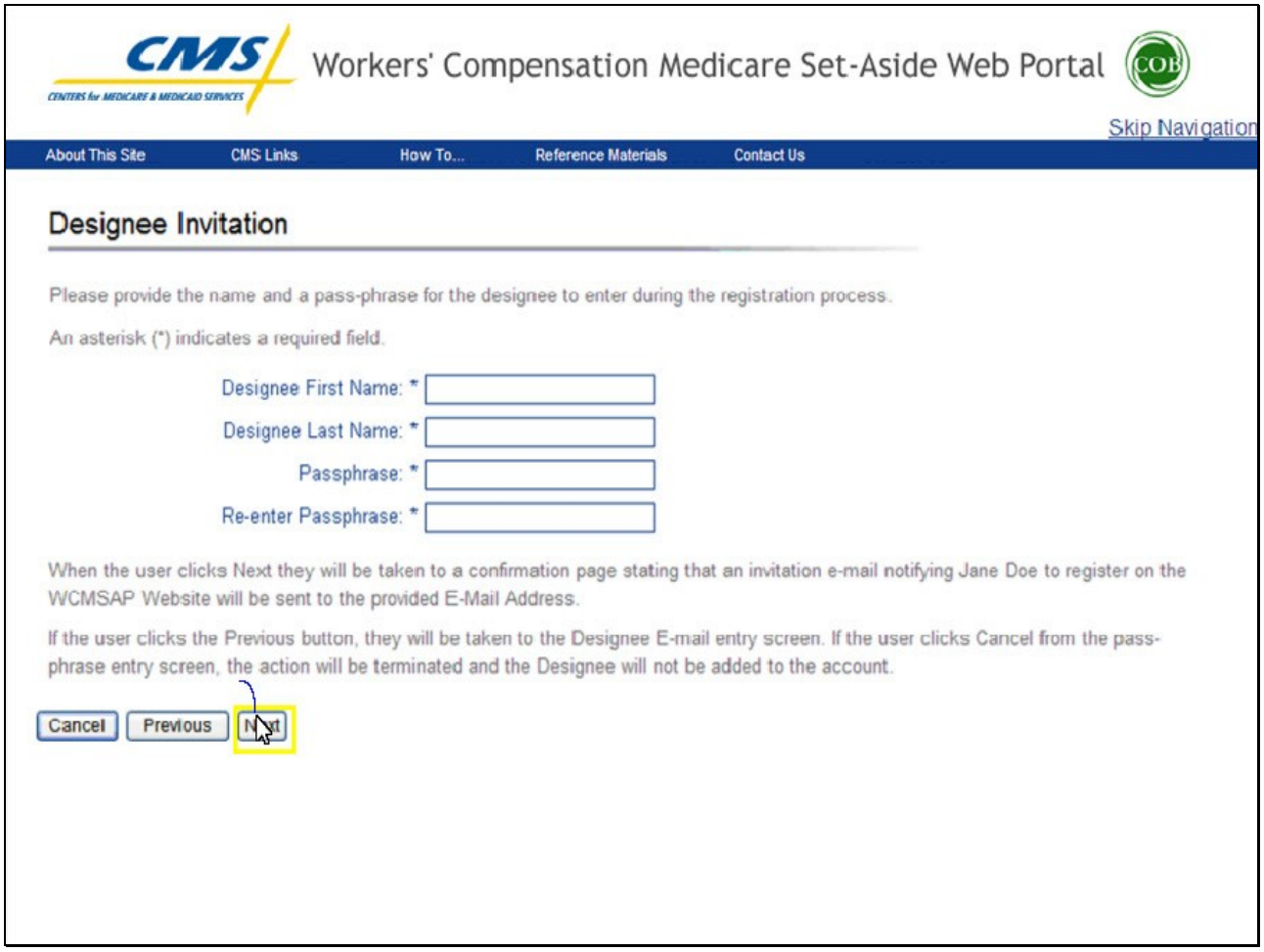

Slide notes

Click Next to continue.

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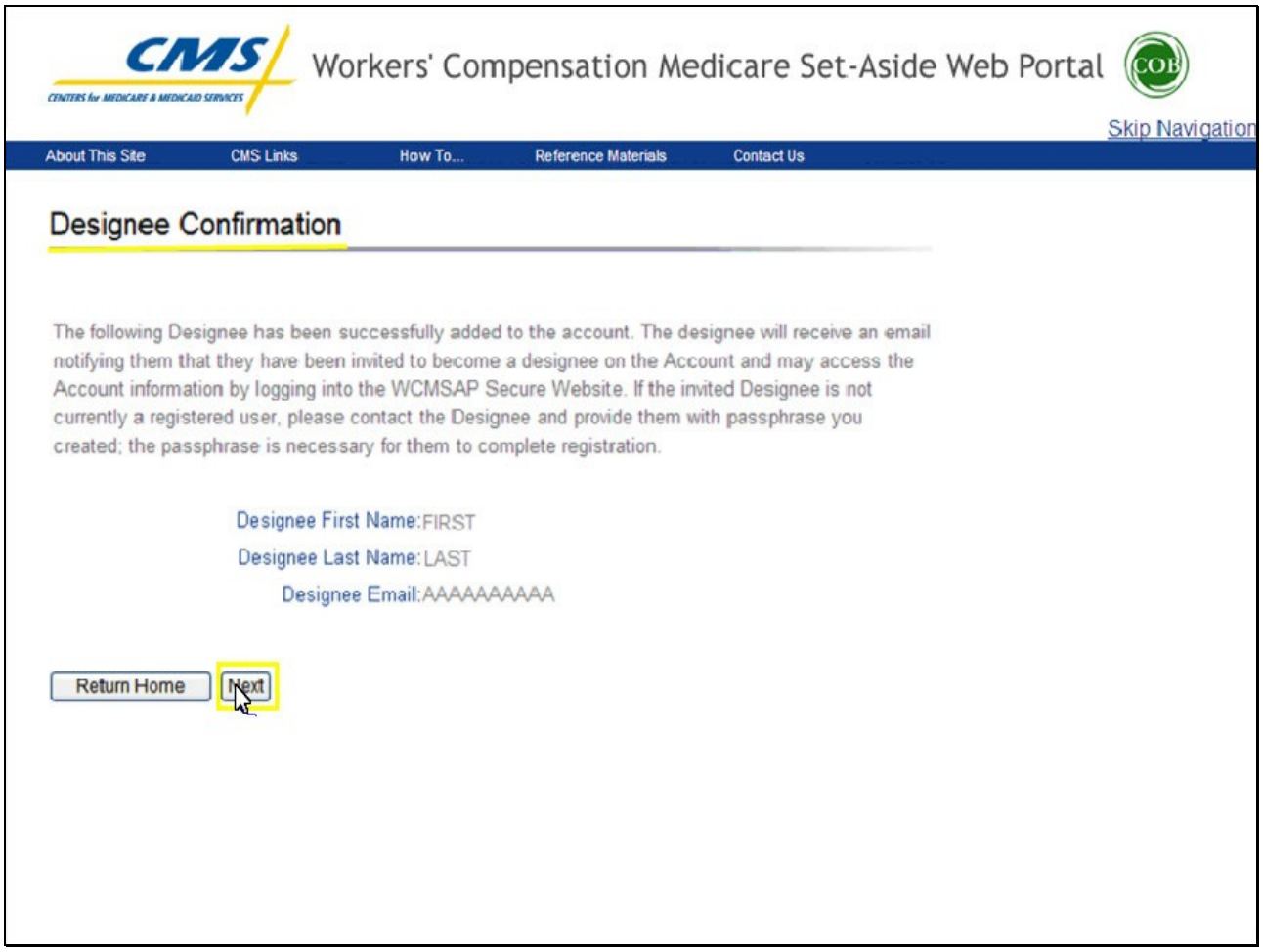

Slide notes

The Designee Confirmation page will display. Click Next to continue.

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CMS CENTERS for MEDICARE & MEDICAID SERVICES Workers' Compensation Medicare Set-Aside Web Portal COB

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Designee Listing

This page provides the Designee(s) information for the individuals you have assigned to the account.

An Account Manager can only make changes to a pending Designee. Once the Designee has registered and has a Login ID, the Account Manager cannot make changes to the Designee information other than deleting the Designee from the account.

To make changes to the account of a particular Designee listed, select the link on the individual's last name. To delete a Designee select the Delete function to the left of the individual's name. Use the **Add a Designee** function to include an individual as a designee. Individuals added as designees will receive an e-mail notifying them that they have been invited to be a designee for the account.

Delete	Last Name	First Name	E-mail Address	Passphrase	Status
X	LAST	FIRST	AAAAAAAAAAAA	AAAAAAA	Active
X	LAST	FIRST	AAAAAAAAAAAA	AAAAAAA	Pending

Add a Designee | Return Home

Slide notes

The Designee Listing page re-displays. The new Account Designee is listed with a status of “Pending.”

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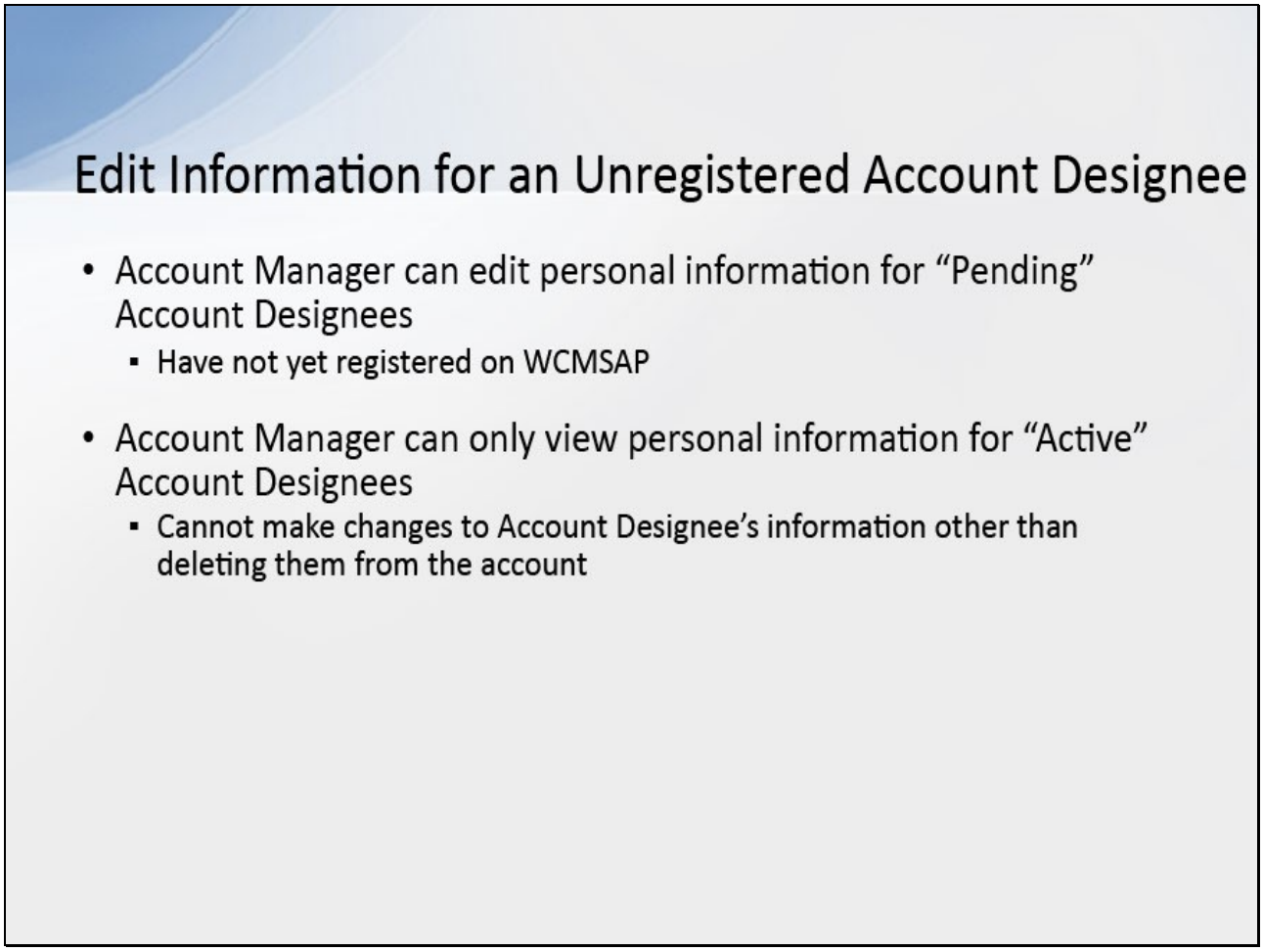


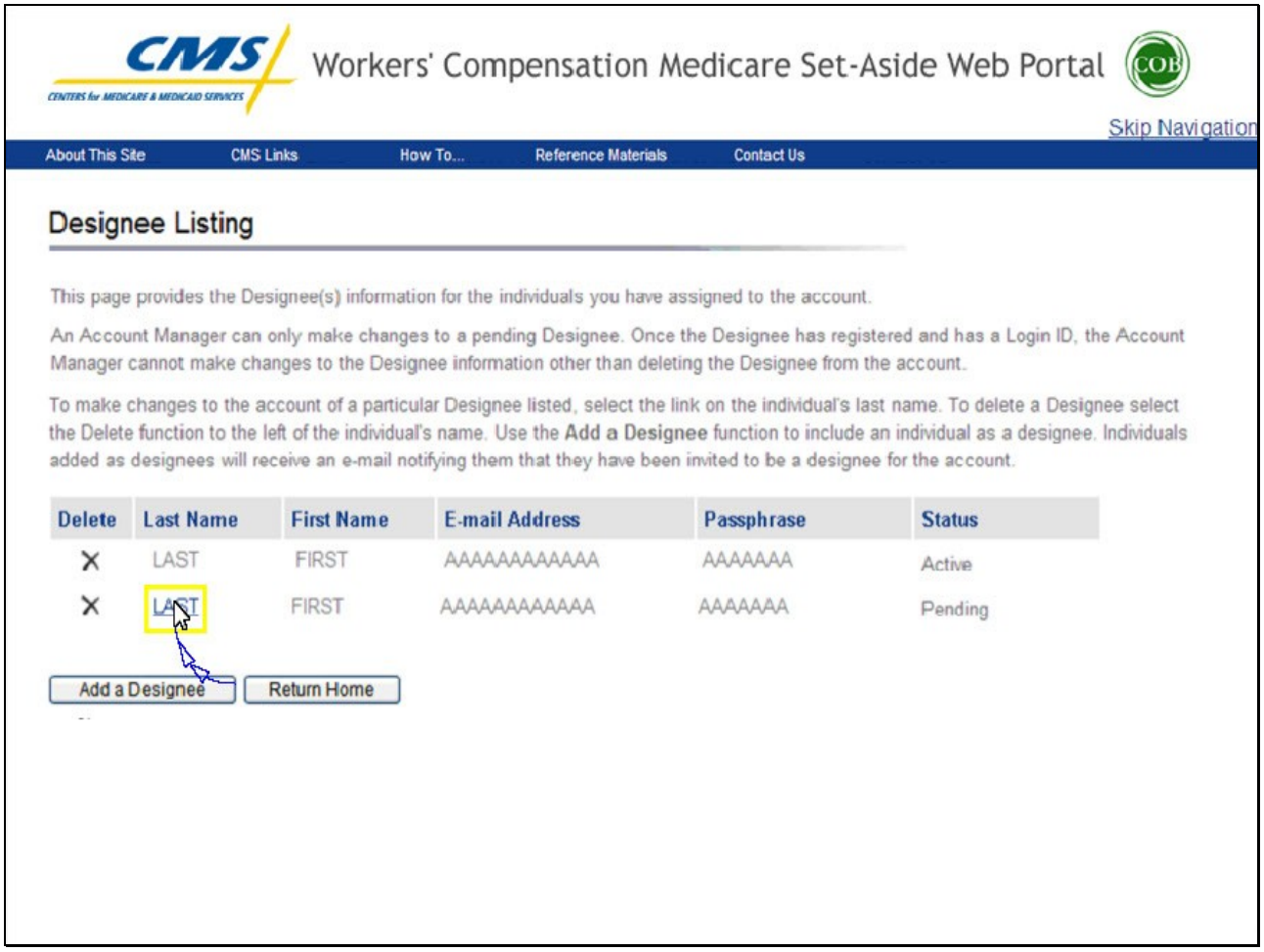
Slide notes

An Account Manager can edit personal information for Account Designees in “Pending” status.

Account Designees in “Pending” status have not yet registered on the WCMSAP. Account Managers can only view personal information for Designees in “Active” status.

Once the Designee has registered and has a Login ID, the Account Manager cannot make changes to the Account Designee's information other than deleting the Account Designee from the account.

Slide 40 - of 53



Slide notes

To make changes to the account of a particular Account Designee in “Pending” status, click the last name of the Designee whose information you wish to update.

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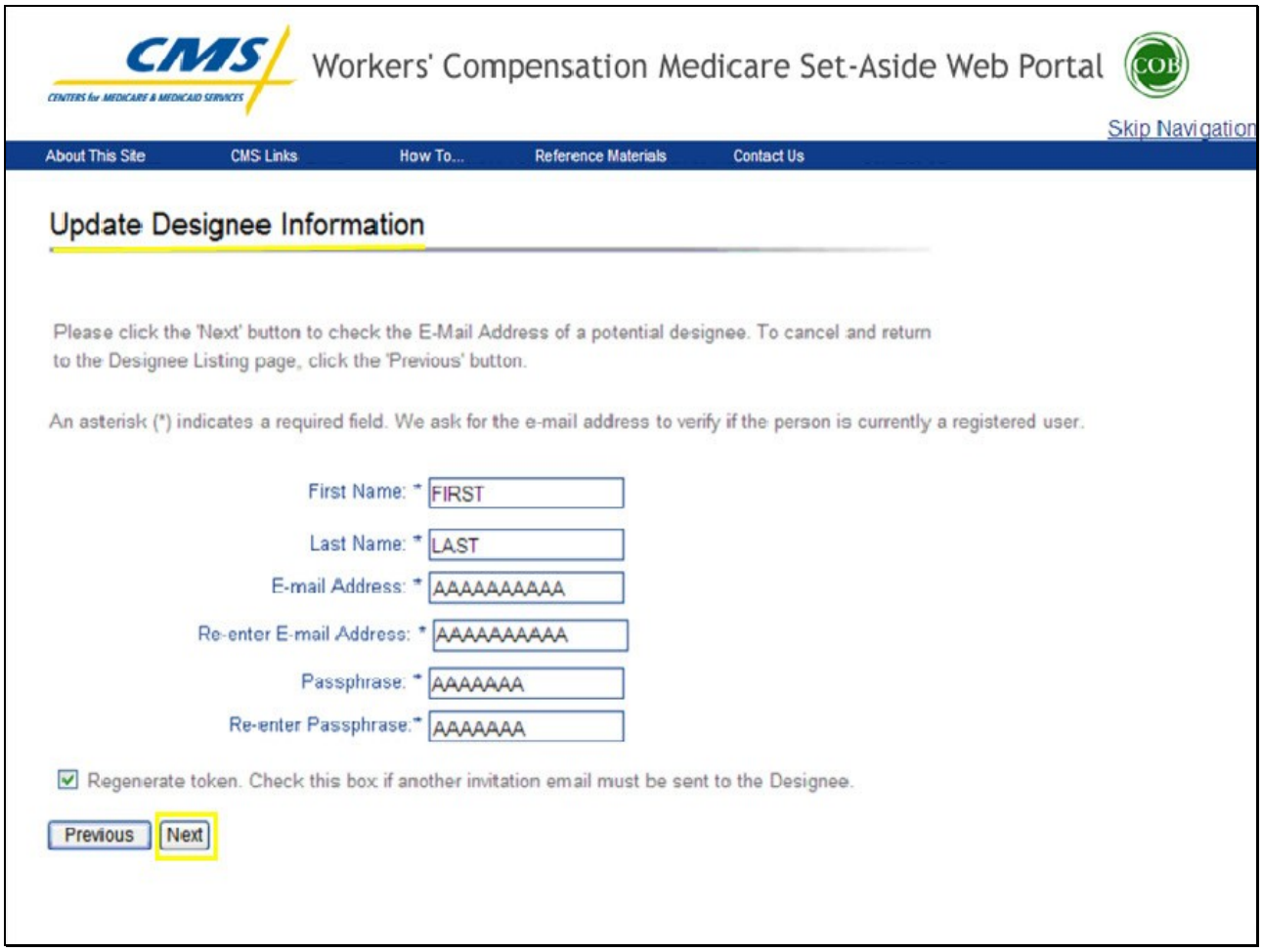

Slide notes

The Update Designee Information page displays, with the Designee's personal information open for editing. Edit the "Pending" Account Designee's information as needed. Click Next to continue.

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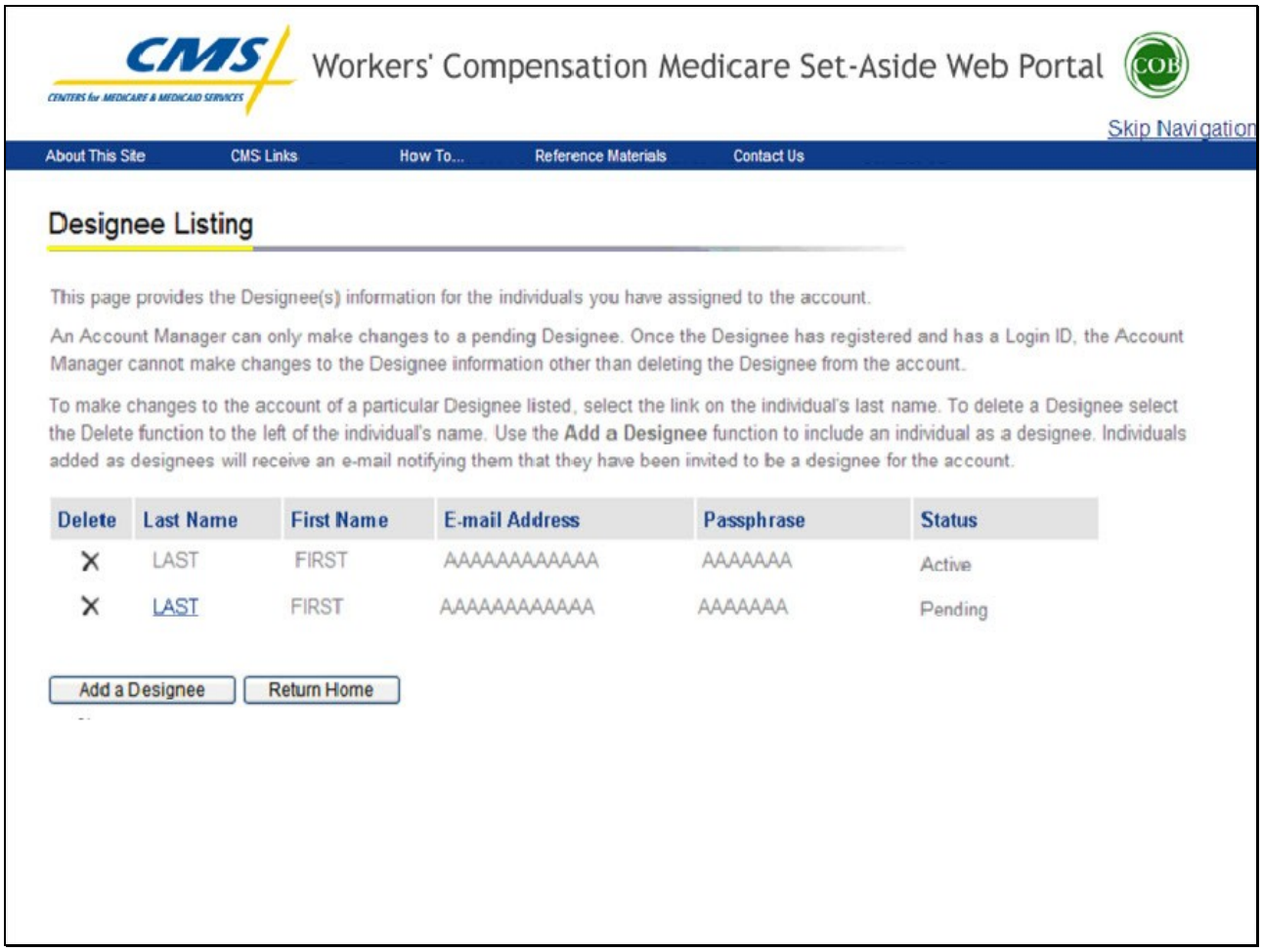

Slide notes

The Designee Listing page re-displays and the Designee's personal information will be updated.

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Regenerate Invitation E-mail

- E-mail is generated when Account Manager invites Account Designee
  - Includes link for self-registration
- If Account Designee misplaces/deletes e-mail or has not registered within 30 days
  - Account Manager can regenerate e-mail
    - Only for Account Designees in “Pending” status
- Previous token link will not work once new e-mail is generated
- E-mail will come from cobva@ghimedicare.com

Slide notes

When the Account Manager invites a person to be an Account Designee, an e-mail is generated and sent to the intended Designee informing them of the invitation, and includes a link for them to access the WCMSAP site and self-register as an Account Designee.

If the intended Designee has misplaced or deleted the invitation e-mail, or if the Account Designee has not registered within 30 days, the Account Manager can regenerate the invitation e-mail, allowing the intended Account Designee to self-register.

The previously-generated link will not work once a new e-mail is generated. Invitation e-mails can only be regenerated for Account Designees in “Pending” status. The e-mail will come from cobva@ghimedicare.com.

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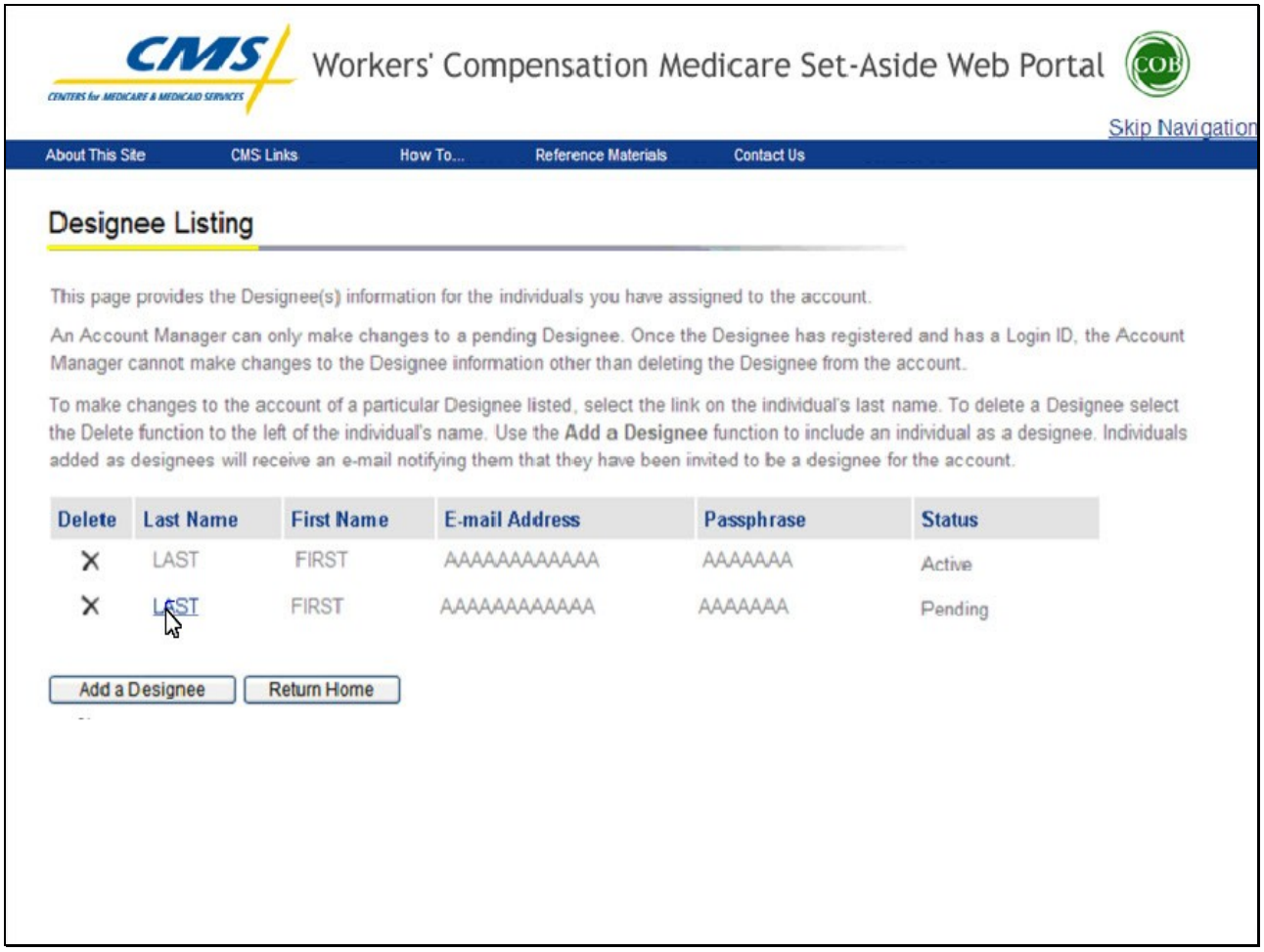

Slide notes

On the Designee Listing page, click the last name of the Designee that needs the e-mail regenerated.

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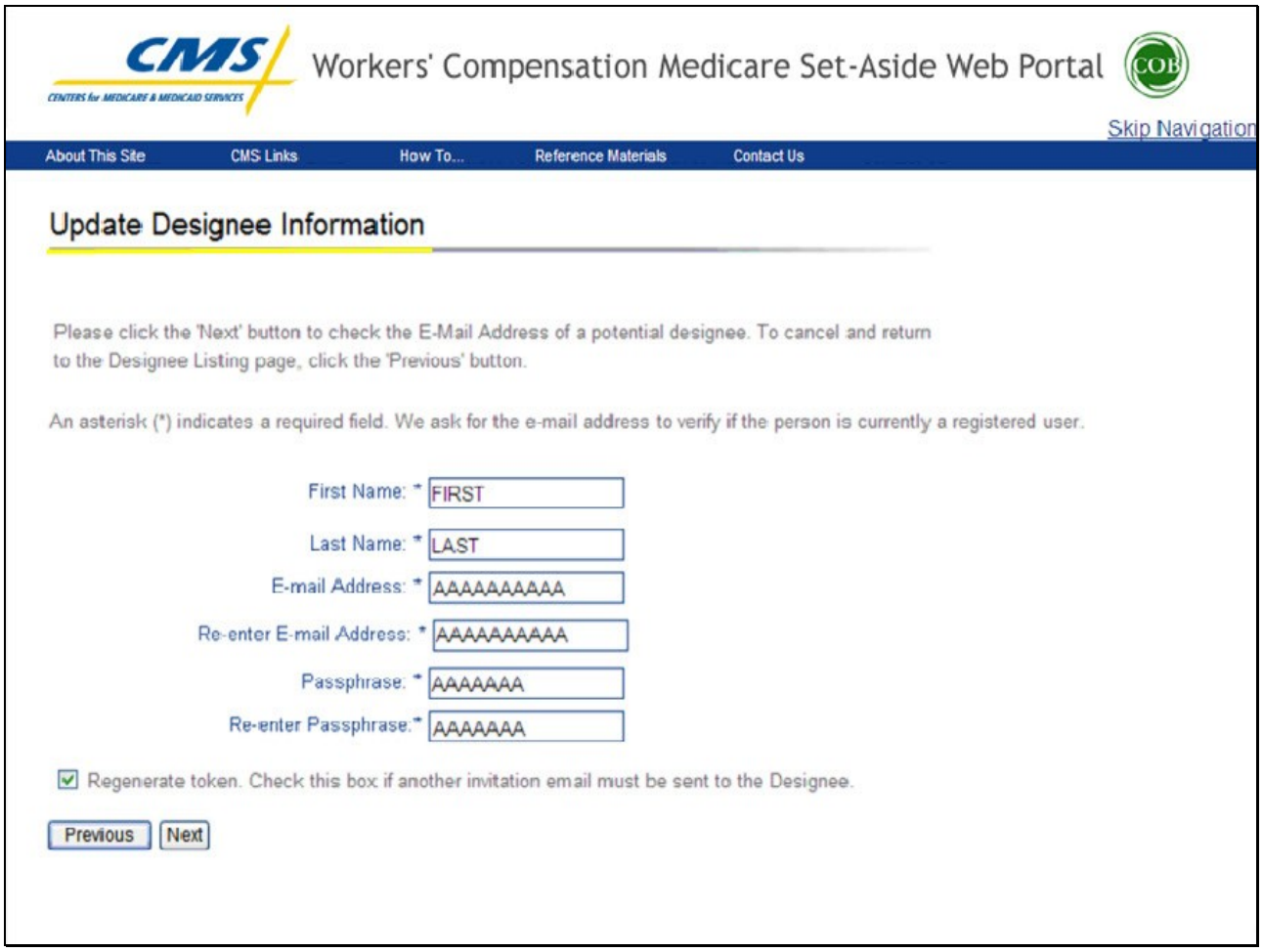

Slide notes

The Update Designee Information page displays, with the Designee's personal information open for editing.

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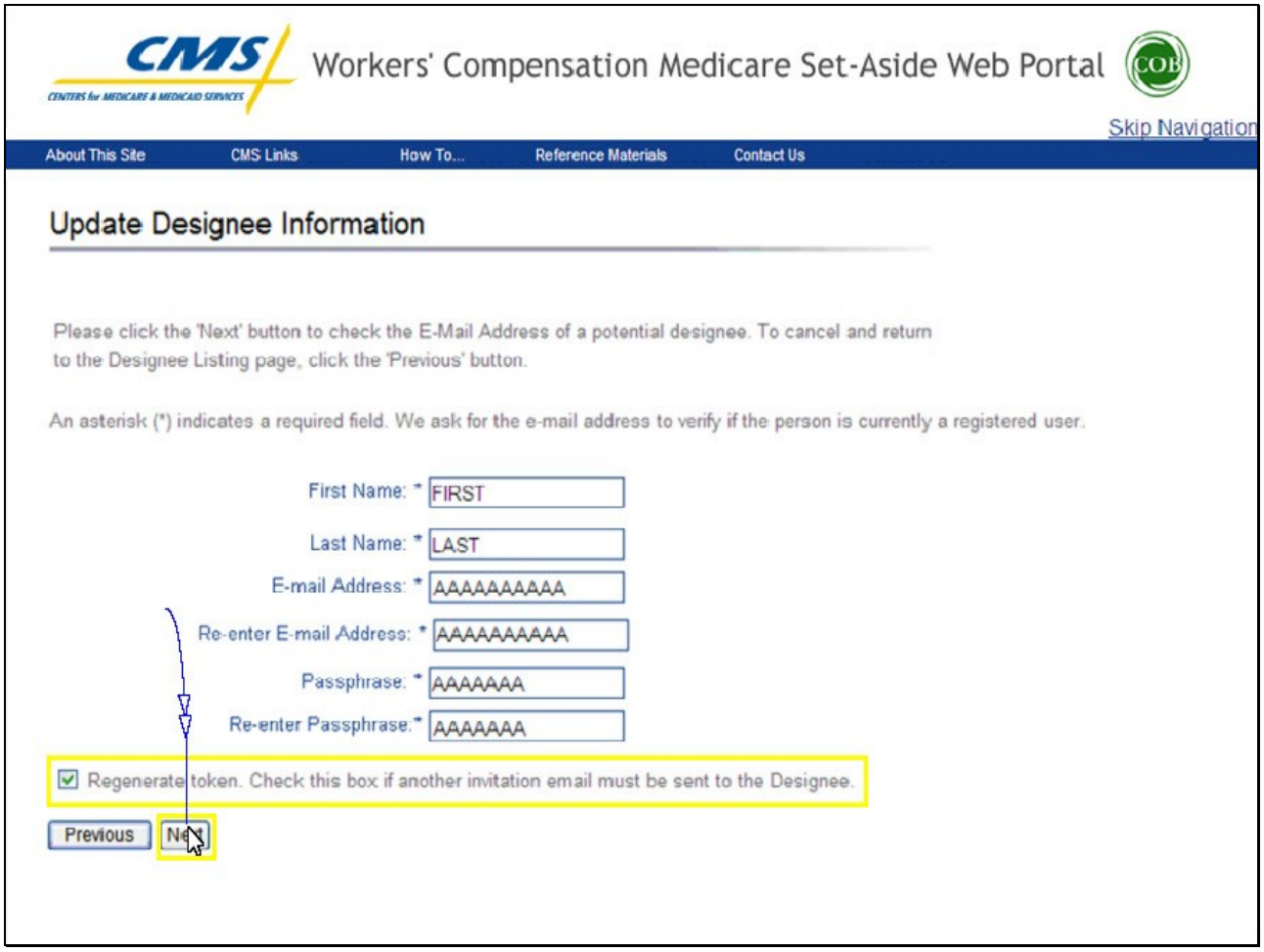

Slide notes

Select the Regenerate token check box beneath the Designee's personal information and then click Next.

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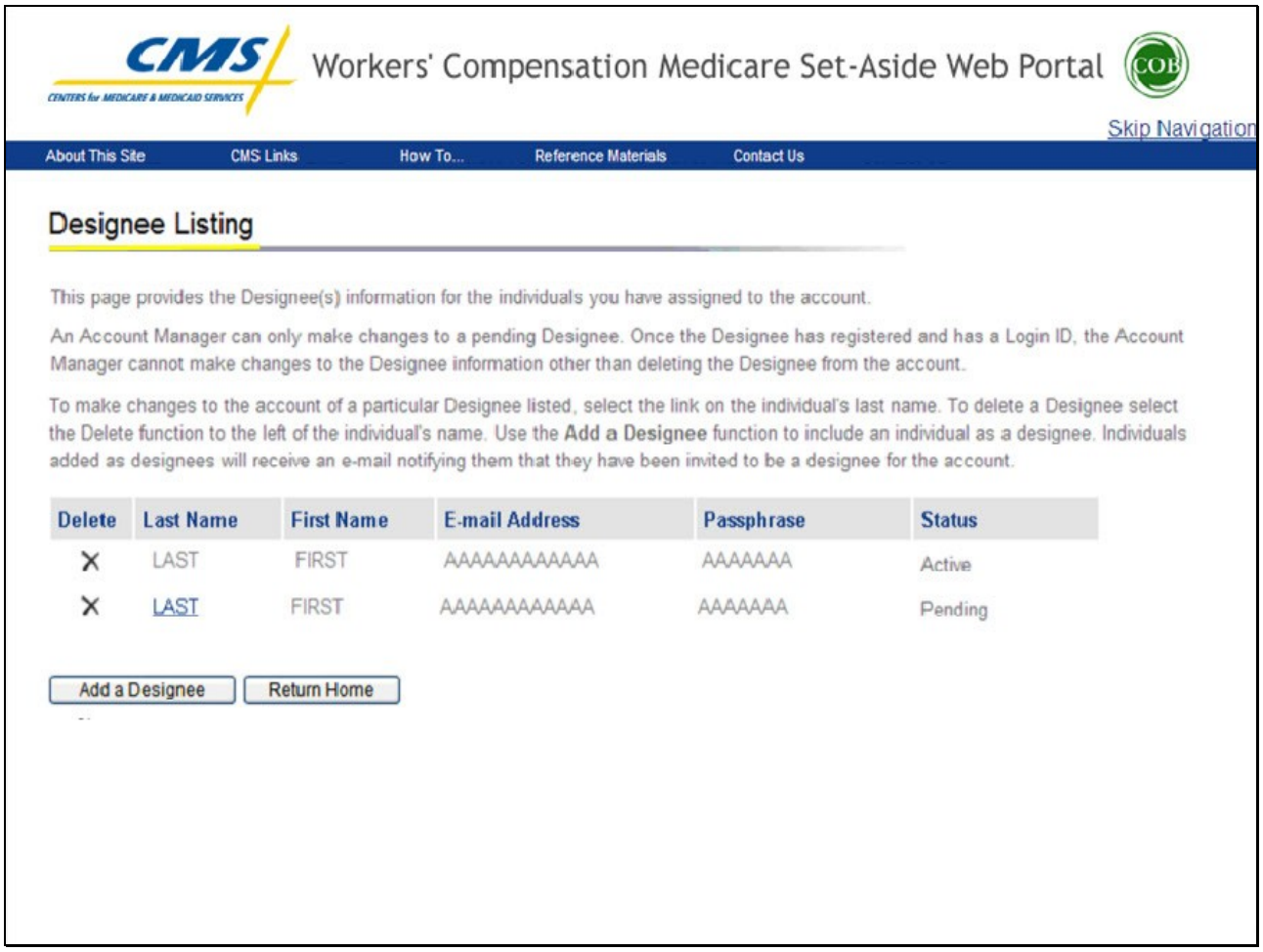

Slide notes

The Designee Listing page re-displays, with the Designee's information unchanged. However, the system re-generates the invitation e-mail and sends it to the e-mail address registered for the Account Designee.

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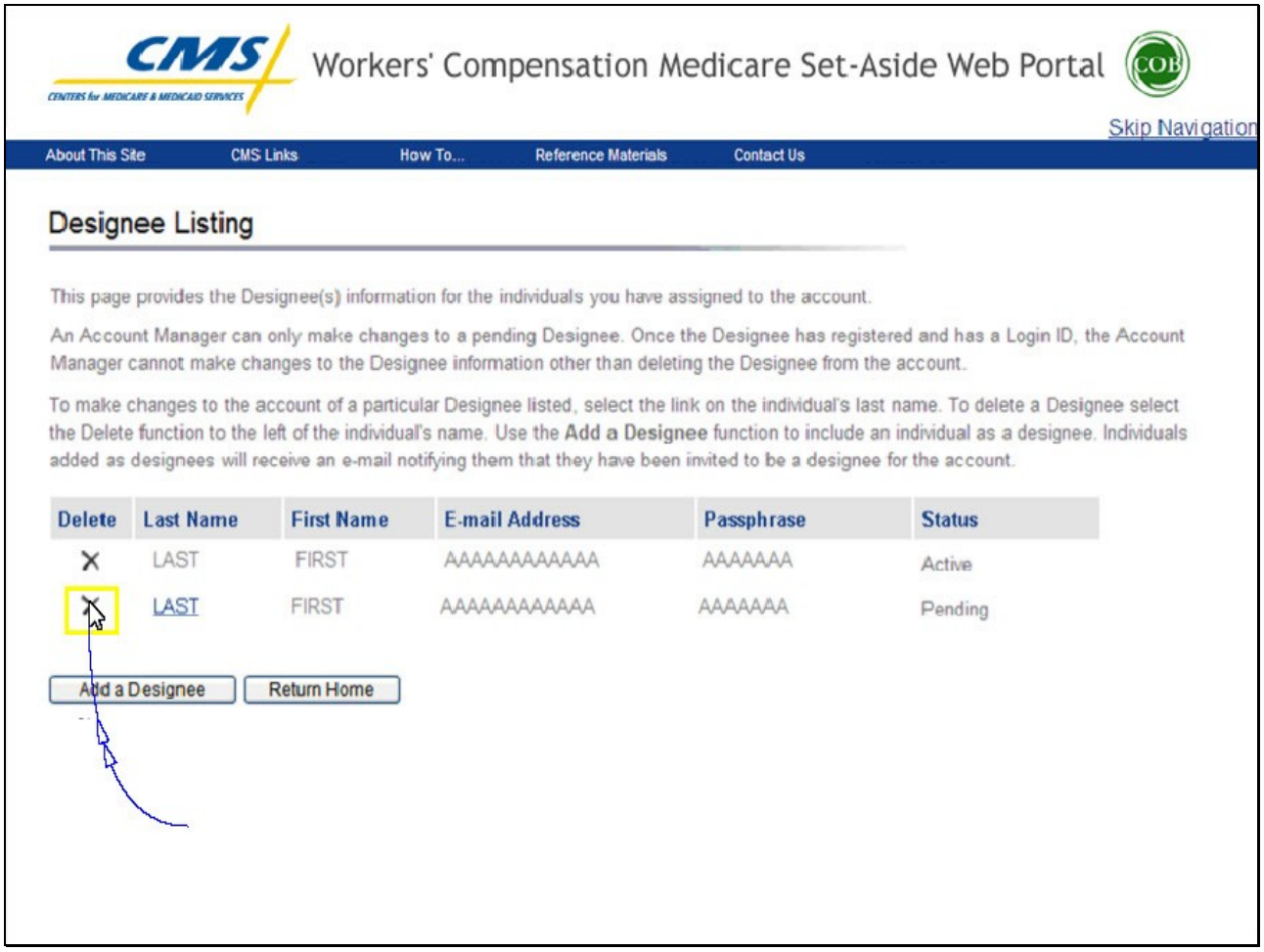

Slide notes

To delete an Account Designee, click the X button next to the individual's name.

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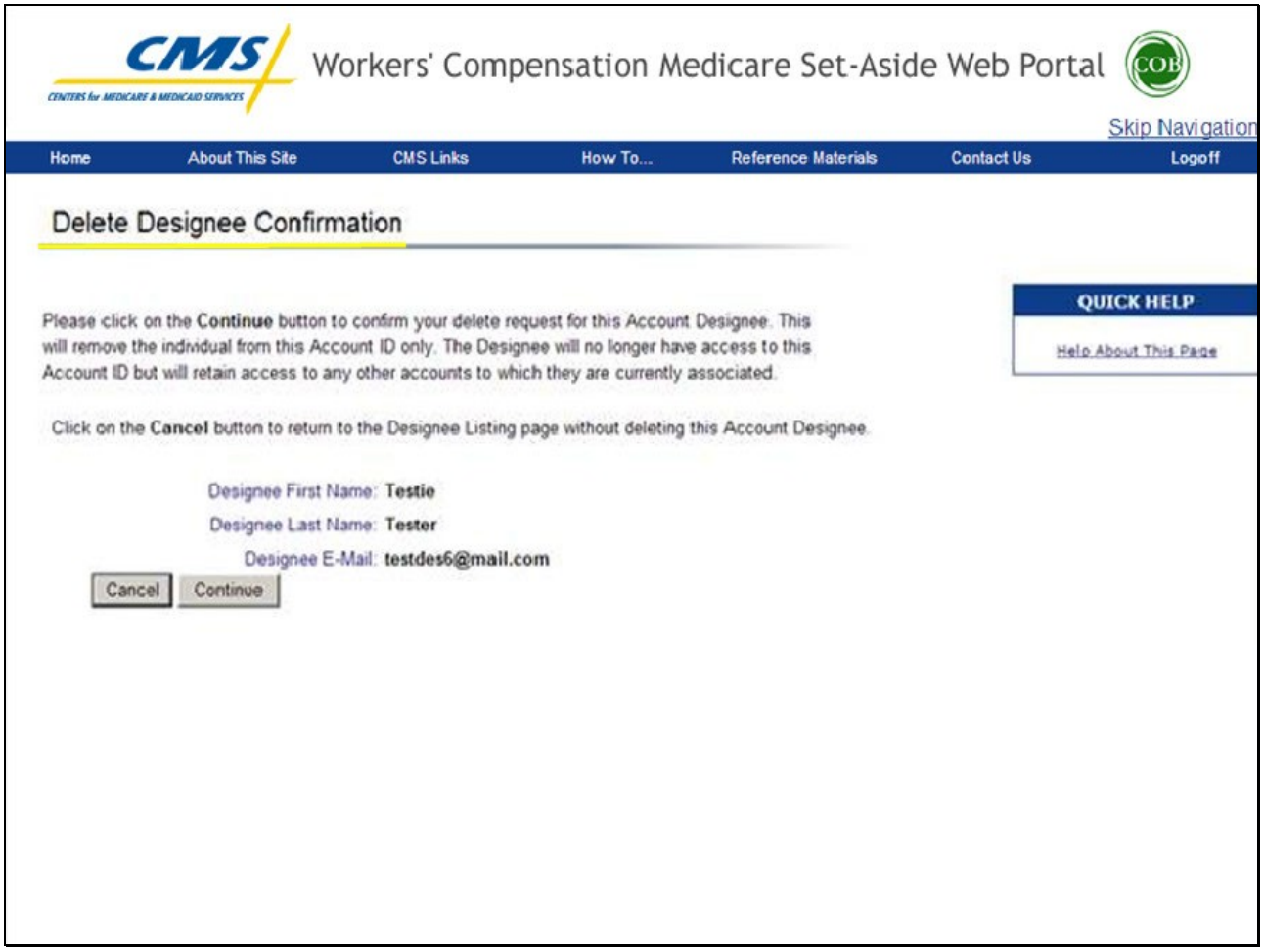

Slide notes

The Delete Designee Confirmation page will display.

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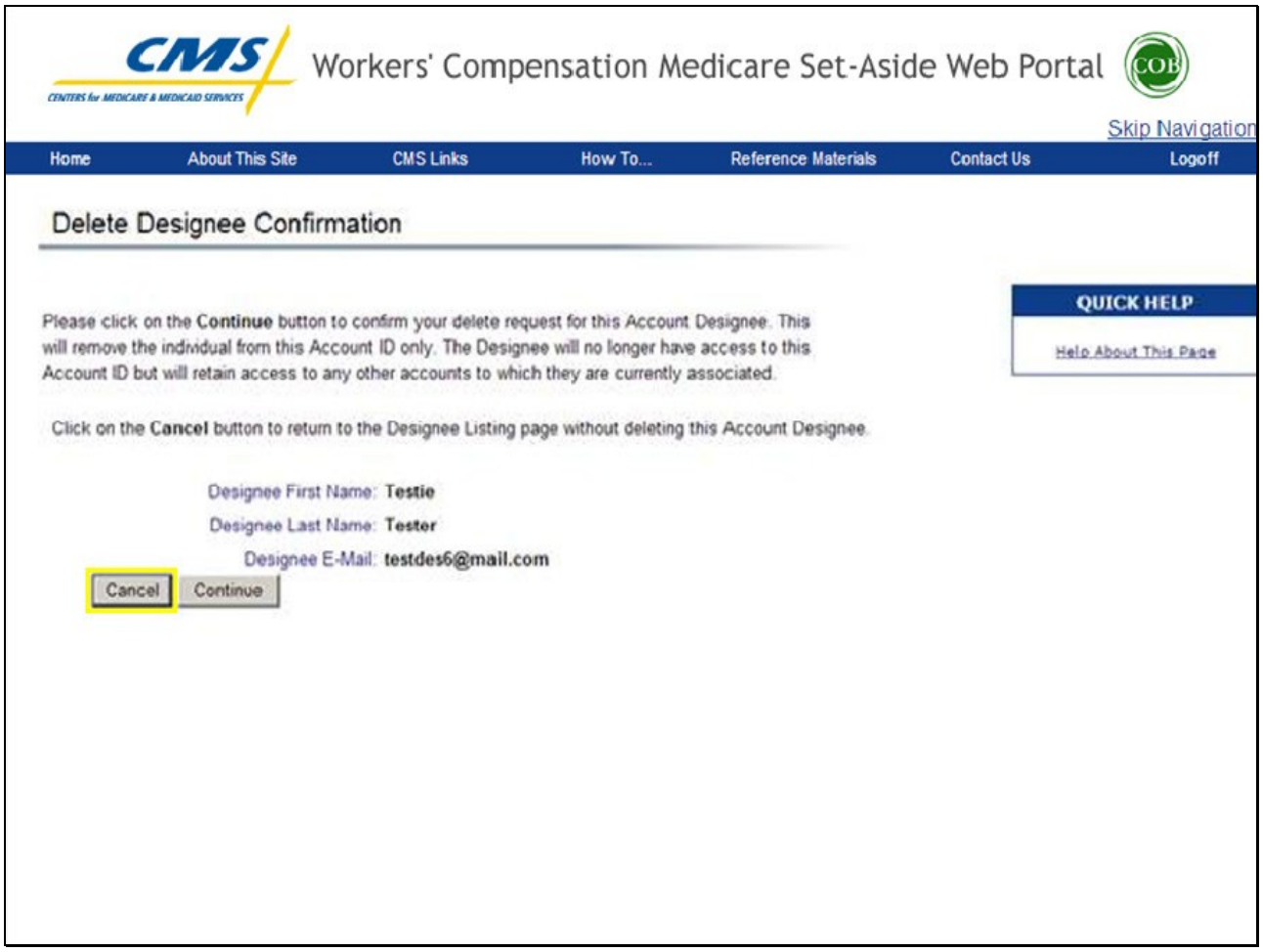

Slide notes

If the Account Manager does not want to delete this Account Designee, they will click the Cancel button to return to the Designee Listing page which will show the Account Designee still listed with their status unchanged.

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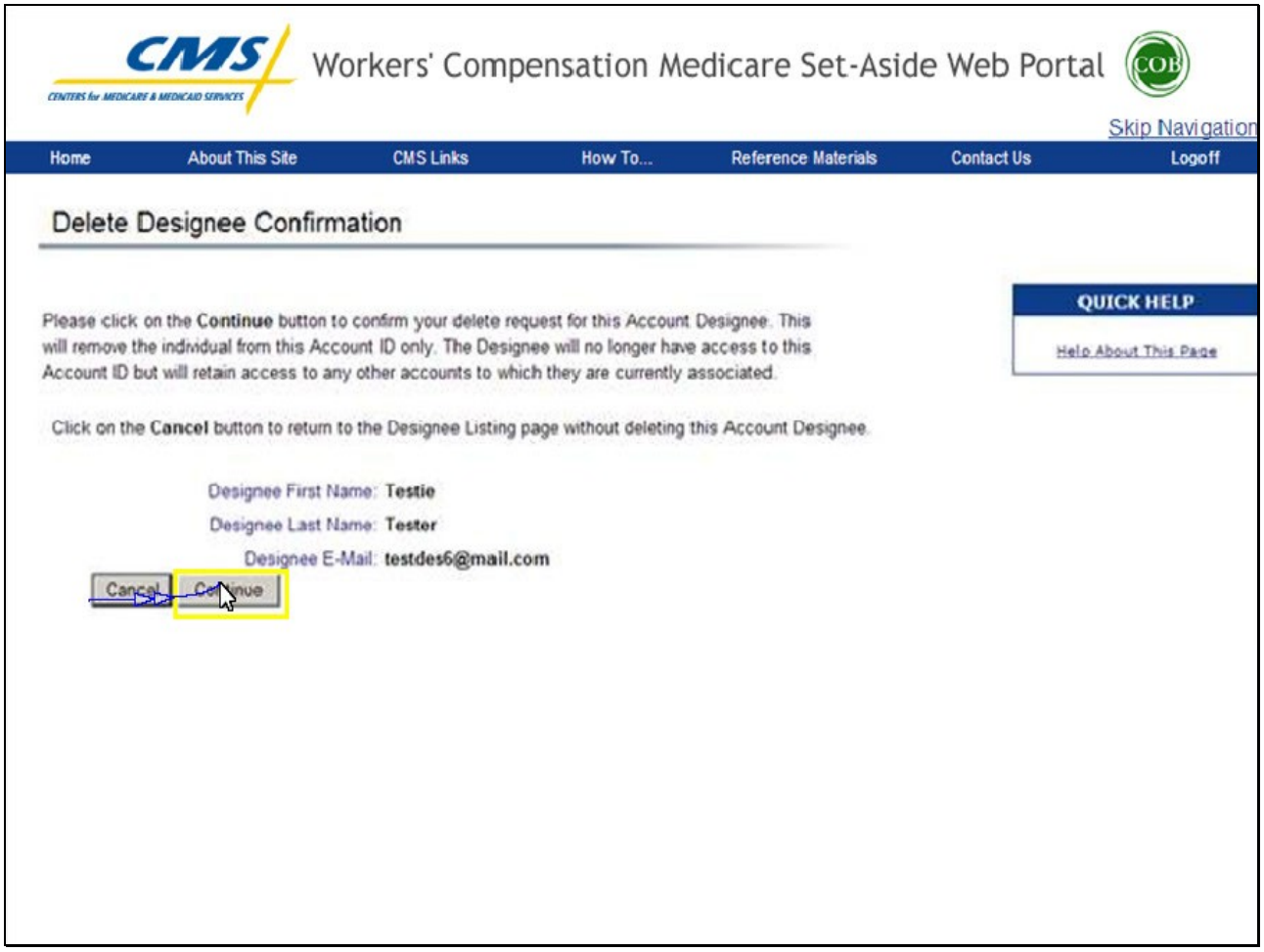

Slide notes

If the Account Manager does want to delete this Account Designee from the WCMSAP account, they will click the Continue button.

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CMS CENTERS for MEDICARE & MEDICAID SERVICES Workers' Compensation Medicare Set-Aside Web Portal COB

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Designee Listing

This page provides the Designee(s) information for the individuals you have assigned to the account.

An Account Manager can only make changes to a pending Designee. Once the Designee has registered and has a Login ID, the Account Manager cannot make changes to the Designee information other than deleting the Designee from the account.

To make changes to the account of a particular Designee listed, select the link on the individual's last name. To delete a Designee select the Delete function to the left of the individual's name. Use the **Add a Designee** function to include an individual as a designee. Individuals added as designees will receive an e-mail notifying them that they have been invited to be a designee for the account.

Delete	Last Name	First Name	E-mail Address	Passphrase	Status
X	LAST	FIRST	AAAAAAAAAAAA	AAAAAAA	Active
X	LAST	FIRST	AAAAAAAAAAAA	AAAAAAA	Pending

Add a Designee | Return Home

Slide notes

This removes the Account Designee from this Account ID only. The deleted individual will no longer have access to this WCMSAP account.

However, the Account Designee will retain access to any other Account ID they are currently associated with. The Designee Listing page redisplays without the Account Designee who was just deleted.

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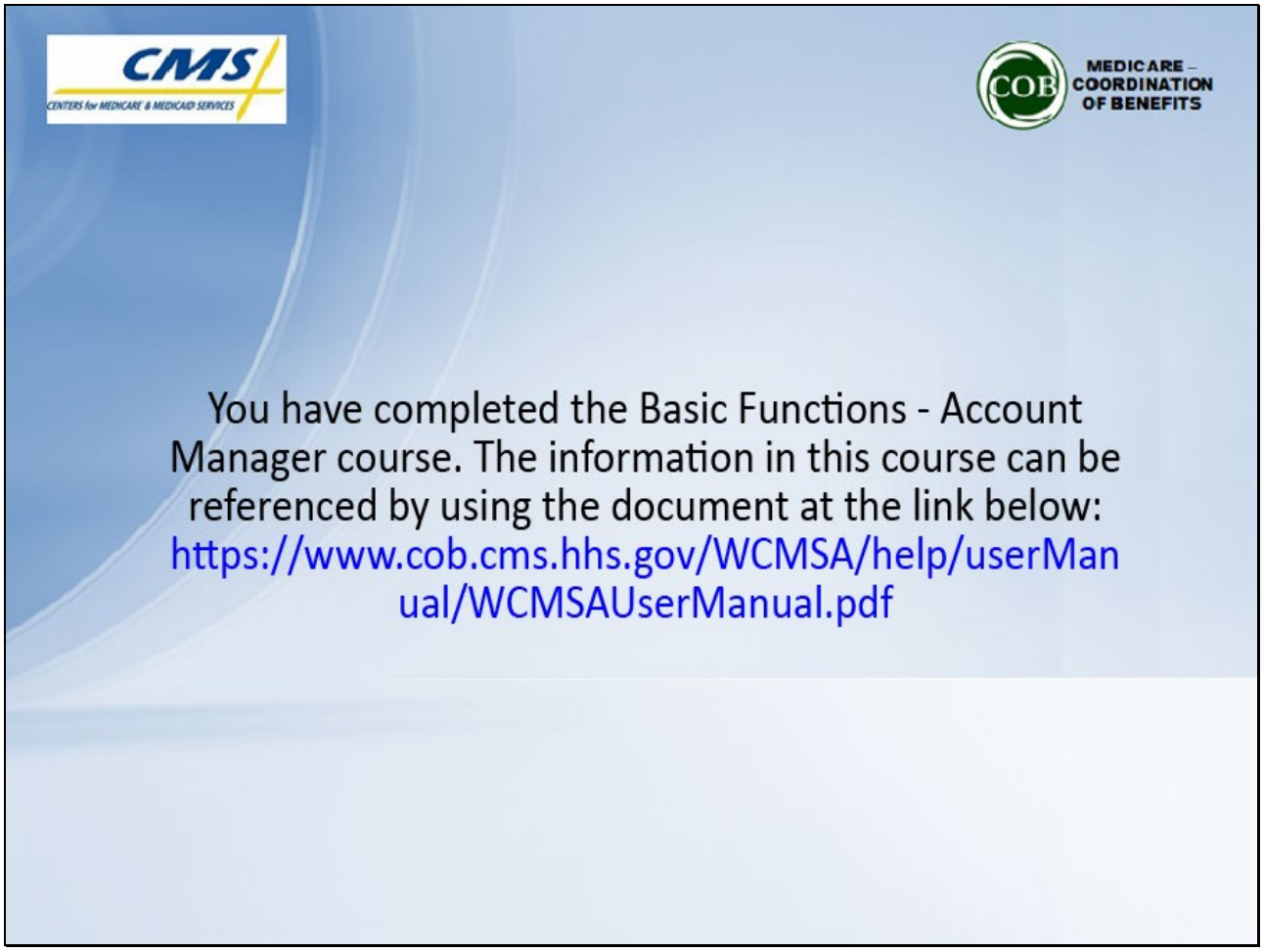

Slide notes