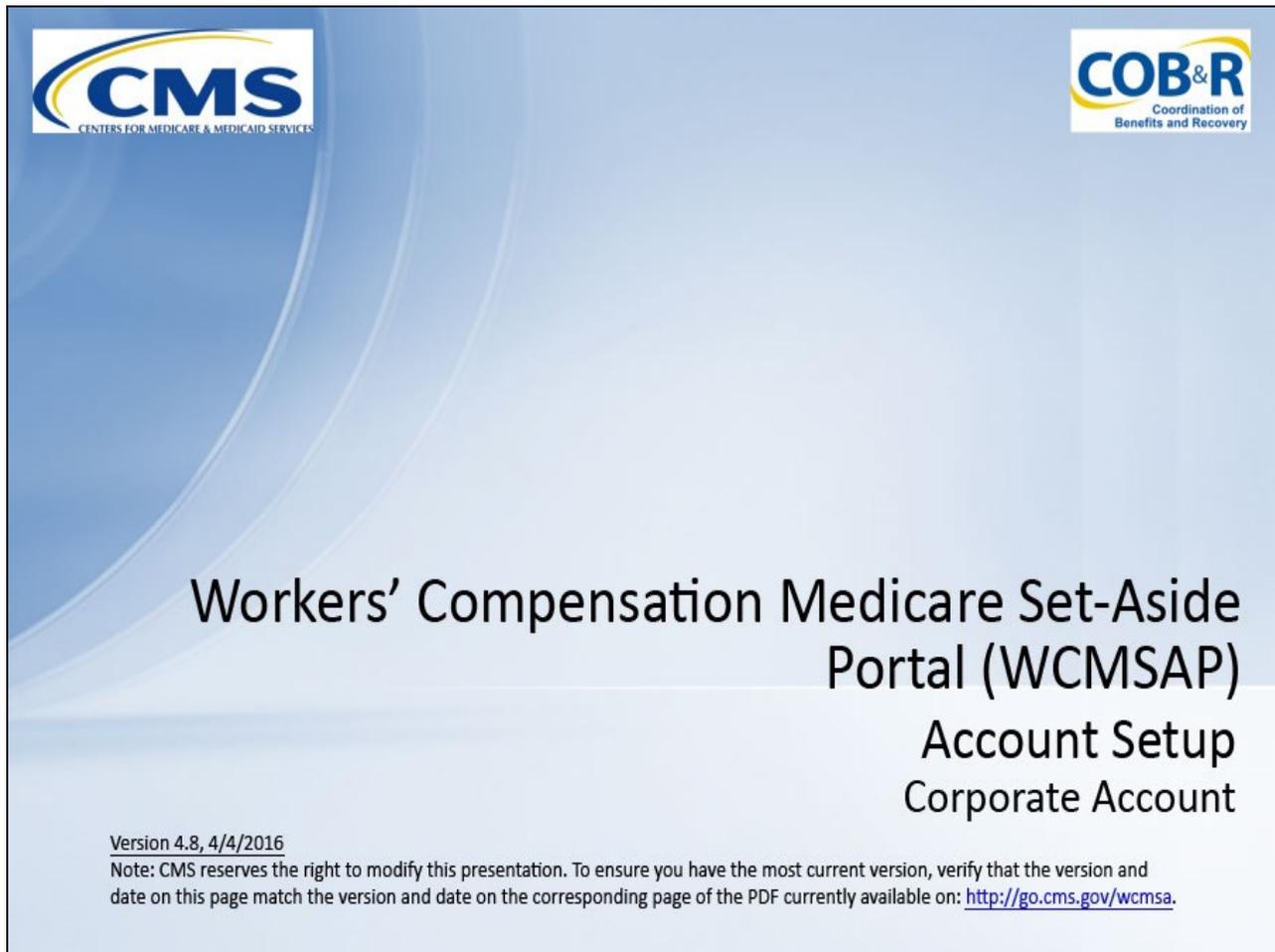


Slide 1 - of 40



**Workers' Compensation Medicare Set-Aside  
Portal (WCMSAP)  
Account Setup  
Corporate Account**

Version 4.8, 4/4/2016  
Note: CMS reserves the right to modify this presentation. To ensure you have the most current version, verify that the version and date on this page match the version and date on the corresponding page of the PDF currently available on: <http://go.cms.gov/wcmsa>.

**Slide notes**

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

Note: This module is intended for corporate WCMSAP account users. A corporate account indicates that the submitter is a corporate entity with an Employer Identification Number (EIN) and will be regularly submitting WCMSA requests.

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.

Slide 2 - of 40

## 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: <https://go.cms.gov/wcmsa>.

### Slide notes

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: <https://go.cms.gov/wcmsa>.

Slide 3 - of 40

## Course Overview

- Account Setup Process
  - Establish Account
  - Establish Login Identification (ID)/Password
  
- Next Steps



### Slide notes

This course will demonstrate how to complete the Account Setup, including establishing an account and a Login Identification (ID) and password. This course will also describe the next steps to follow once the Account Setup has been submitted.

Slide 4 - of 40

## Getting Started

- Corporate entity must identify Account Manager
- Account Manager completes Account Setup as long as
  - Corporate entity has completed New Registration step
  - Authorized Representative has received mailing from Benefits Coordination and Recovery Center (BCRC) containing
    - Personal Identification Number (PIN)
    - Account ID/Submitter ID

### Slide notes

To begin, the corporate entity must identify their Account Manager. The Account Manager is responsible for completing the Account Setup.

The Account Manager may initiate the Account Setup if the corporate entity has already completed the New Registration step and their Authorized Representative has already received a mailing from the Benefits Coordination and Recovery Center (BCRC) containing the Personal Identification Number (PIN) and Account ID/Submitter ID.

The Account Manager will need this information to complete the Account Setup.

Slide 5 - of 40

## Getting Started

- Account Manager
  - Information recorded during Account Setup
  - Only one for each WCMSAP account
  - Controls the administration of the account
  - Manages the overall process
  - May choose to manage the entire account or invite other employees to assist in the process
- Electronic Data Interchange (EDI) Representative
  - Handles reassignment of Account Manager, if needed

### Slide notes

During Account Setup, information for the corporate entities' Account Manager will be recorded. Each WCMSAP account can only have one Account Manager.

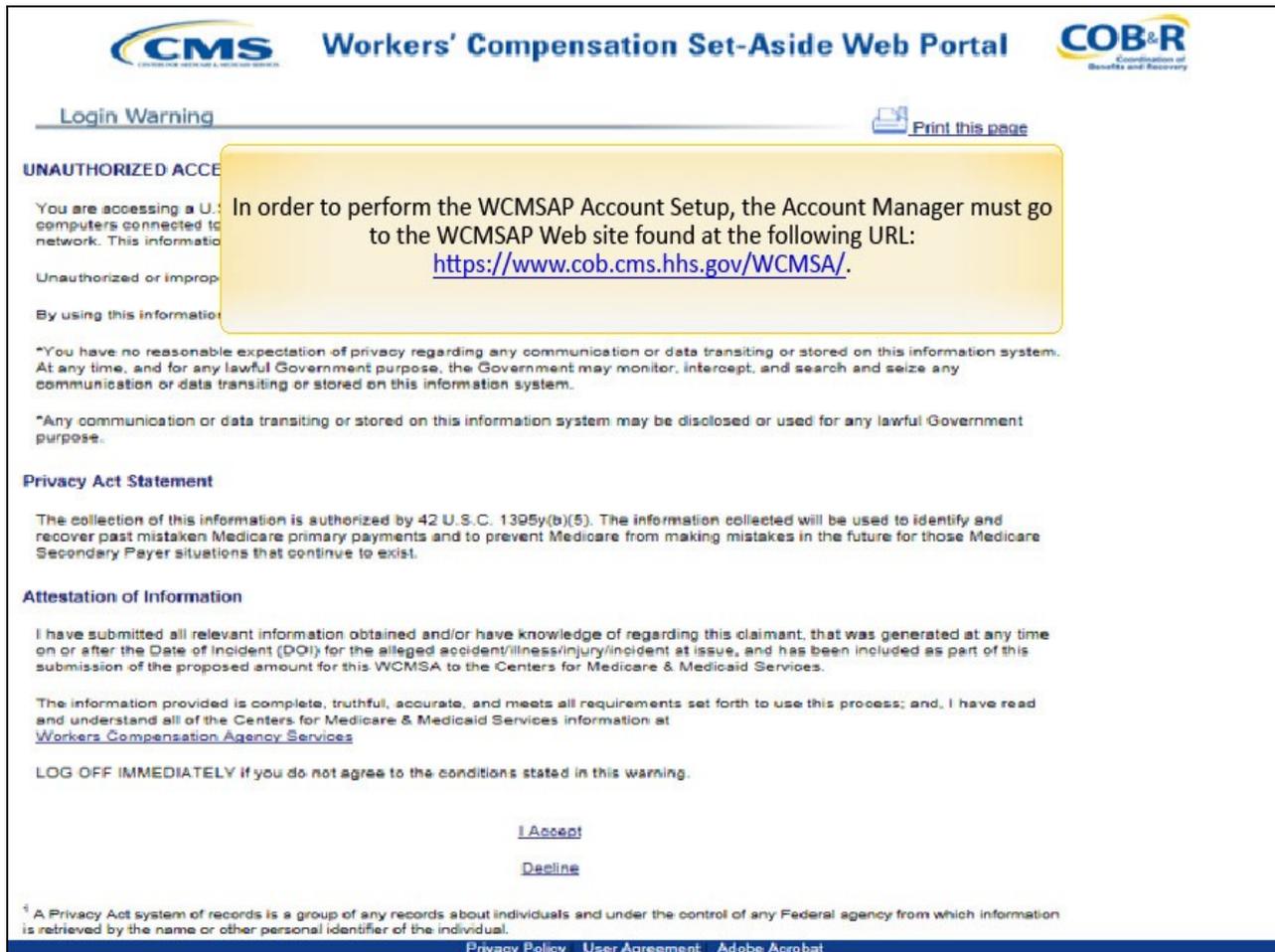
This is the individual who controls the administration of the account and manages the overall process.

The Account Manager may choose to manage the entire account or may invite other company employees to assist in this process.

For more information on the Account Manager's role, please see the Basic Functions for Account Managers CBT.

Note: An Electronic Data Interchange (EDI) Representative will handle the reassignment of an Account Manager if an Account Manager needs to be changed for an account.

## Slide 6 - of 40



**CMS** **Workers' Compensation Set-Aside Web Portal** **COB&R**  
Coordination of Benefits and Recovery

Login Warning  Print this page

**UNAUTHORIZED ACCESS**

You are accessing a U.S. Government information system from computers connected to this information system. This information system is intended only for authorized users. Unauthorized or improper use of this information system is prohibited. By using this information system, you agree to the following terms and conditions:

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

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

**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](#)

<sup>3</sup> 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](#)

## Slide notes

In order to perform the WCMSAP Account Setup, the Account Manager must go to the WCMSAP Web site

found at the following URL: <https://www.cob.cms.hhs.gov/WCMSA/>.

## Slide 7 - of 40

Workers' Compensation Set-Aside Web Portal

[Login Warning](#)  [Print this page](#)

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**UNAUTHORIZED ACCESS TO THIS COMPUTER SYSTEM IS PROHIBITED BY LAW**

You are accessing a U.S. Government information system, which includes: (1) this computer, (2) this computer network, (3) all computers connected to this network, and (4) all devices and storage media attached to this network or to a computer on this network. This information system is provided for U.S. Government-authorized use only.

Unauthorized or improper use of this system may result in disciplinary action, as well as civil and criminal penalties.

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

**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](#)

<sup>1</sup> 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.

**Slide notes**

Each time you visit the WCMSAP Web site, the Login Warning page will display the Data Use Agreement (DUA). The DUA provides information about WCMSAP security measures including access, penalty and privacy laws.

You must agree to the terms of this warning each time you access the WCMSAP application.

## Slide 8 - of 40

**Workers' Compensation Set-Aside Web Portal**

[Login Warning](#)

 [Print this page](#)

**UNAUTHORIZED ACCESS TO THIS COMPUTER SYSTEM IS PROHIBITED BY LAW**

You are accessing a U.S. Government information system, which includes: (1) this computer, (2) this computer network, (3) all computers connected to this network, and (4) all devices and storage media attached to this network or to a computer on this network. This information system is provided for U.S. Government-authorized use only.

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

**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](#)

<sup>1</sup> 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.

## Slide notes

You must review the DUA and click the I Accept link at the bottom of the page to continue. Otherwise, you will be denied access to the WCMSAP site and will be unable to complete Account Setup.

Slide 9 - of 40

**CMS** Workers' Compensation Set-Aside Web Portal **COB&R**  
Coordination of Benefits and Recovery

About This Site CMS Links How To... Reference Materials Contact Us [Skip Navigation](#)

## Welcome to the WCMSAP

This site provides an interface for entry of Workers' Compensation Medicare Set-Aside Arrangements (WCMSA) proposals. Attorneys, Medicare beneficiaries, claimants, insurance carriers and WCMSA vendors may use this site to enter the case information directly. The site also provides attorneys, Medicare beneficiaries, claimants, insurance carriers, and WCMSA vendors with the ability to track their submitted cases and the statuses without inquiry to the Benefits Coordination & Recovery Center (BCRC) or the Centers for Medicare & Medicaid Services (CMS).

For information about the availability of auxiliary aids and services, please visit: <http://www.medicare.gov/about-us/nondiscrimination/nondiscrimination-notice.html>

**Sign into your account**  
User Name:   
[Forgot ID](#)  
Password:   
[Forgot Password](#)

**WCMSAP Message**  
Testing Message Text

**GETTING STARTED**  
For more information, refer to How To Get Started under the How To menu option.

**STEP 1** **STEP 2**

**New Registration** ➔ **Account Setup** ➔  
(Account ID and PIN required)

Slide notes

Once you have clicked on the I Accept link, you will be brought to the Login (Welcome) page.

Slide 10 - of 40

The screenshot shows the homepage of the Workers' Compensation Set-Aside Web Portal. At the top, there are logos for CMS (Centers for Medicare & Medicaid Services) and COB&R (Coordination of Benefits and Recovery). The main heading is "Workers' Compensation Set-Aside Web Portal". Below this is a navigation bar with links: "About This Site", "CMS Links", "How To...", "Reference Materials", and "Contact Us". A "Skip Navigation" link is also present. The main content area starts with "Welcome to the WCMSAP". A paragraph explains that the site provides an interface for entry of Workers' Compensation Medicare Set-Aside Arrangements (WCMSA) proposals and allows attorneys, Medicare beneficiaries, claimants, insurance carriers, and WCMSA vendors to enter case information directly. It also provides attorneys, Medicare beneficiaries, claimants, insurance carriers, and WCMSA vendors with the ability to track their submitted cases and statuses without inquiry to the Benefits Coordination & Recovery Center (BCRC) or the Centers for Medicare & Medicaid Services (CMS). A link is provided for information about auxiliary aids and services: <http://www.medicare.gov/about-us/nondiscrimination/nondiscrimination-notice.html>. On the right side, there is a "Sign into your account" box with fields for "User Name:" and "Password:", each with a "Forgot" link below it. "Login" and "Clear" buttons are at the bottom of the box. Below the sign-in box, there is a "WCMSAP Message" section with the text "Testing Message Text". The "GETTING STARTED" section follows, with a note to refer to "How To Get Started" under the "How To" menu option. At the bottom, there are two buttons: "New Registration" (labeled "STEP 1") and "Account Setup" (labeled "STEP 2"). The "Account Setup" button has a note below it: "(Account ID and PIN required)".

Slide notes

To begin this process, your designated Account Manager must click the Account Setup button.

## Slide 11 - of 40



CMS  
CENTRALIZED MEDICARE & MEDICAID SERVICES



COB&R  
Coordination of  
Benefits and Recovery

## Workers' Compensation Set-Aside Web Portal

[About This Site](#) [CMS Links](#) [How To...](#) [Reference Materials](#) [Contact Us](#) [Skip Navigation](#)

### Account Setup Intro

You have selected a link that guides you through the process of establishing a new Account Manager ID for the Workers' Compensation Medicare Set-Aside Web Portal (WCMSAP). Please have your Account Identification Number and Personal Identification Number (PIN) available. The Account ID and PIN are listed on the mailing that was sent to the contact for the account. This would be the Account Representative for a corporate account type, the Representative for a representative account type and the Beneficiary/Claimant for a self account type.

If you are already associated with an account on the WCMSA Web Portal you will not be allowed register for a different account. An Account Manager is only allowed to be associated to one WCMSAP account.

During this process you will.

- Finalize the establishment of the account. and
- Create your personal Login ID for the Workers' Compensation Medicare Set-Aside Web Portal (WCMSAP).

Before proceeding it is important to understand the roles of the various WCMSAP users, and their respective responsibilities to ensure the WCMSAP accounts are managed correctly. The role of the Account Manager is described below.

**Account Manager** – The Account Manager is the WCMSAP user who is required to initiate the request for an account. They are the person who "administers" the account on the Web site on behalf of the registrant. The Account Manager is the person who is responsible for: establishing the account on the Web Portal; managing the case load and assigning some or all of the cases to other responsible parties to complete on the Web Portal; tracking the status of the tasks assigned to others; and ensuring case entry and submission are completed on time. The Account Manager is responsible for inviting other employees to register on the Web Portal and managing their access. The Account Manager may complete and submit cases on his own or invite Designees to assist as needed.

If your user role in the Workers' Compensation Medicare Set-Aside Web Portal (WCMSAP) is that of an Account Manager as described above and you have not yet registered, press the Next button and proceed with registering as a new Account Manager.

## Slide notes

The Account Setup Intro page will display. This page describes the Account Setup process and informs you of your duties as the Account Manager.

## Slide 12 - of 40



## Workers' Compensation Set-Aside Web Portal

About This Site   CMS Links   How To...   Reference Materials   Contact Us   [Skip Navigation](#)

### Account Setup Intro

You have selected a link that guides you through the process of establishing a new Account Manager ID for the Workers' Compensation Medicare Set-Aside Web Portal (WCMSAP). Please have your Account Identification Number and Personal Identification Number (PIN) available. The Account ID and PIN are listed on the mailing that was sent to the contact for the account. This would be the Account Representative for a corporate account type, the Representative for a representative account type and the Beneficiary/Claimant for a self account type.

If you are already associated with an account on the WCMSA Web Portal you will not be allowed register for a different account. An Account Manager is only allowed to be associated to one WCMSAP account.

During this process you will.

- Finalize the establishment of the account. and
- Create your personal Login ID for the Workers' Compensation Medicare Set-Aside Web Portal (WCMSAP).

Before proceeding it is important to understand the roles of the various WCMSAP users, and their respective responsibilities to ensure the WCMSAP accounts are managed correctly. The role of the Account Manager is described below.

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If your user role in the Workers' Compensation Medicare Set-Aside Web Portal (WCMSAP) is that of an Account Manager as described above and you have not yet registered, press the Next button and proceed with registering as a new Account Manager.

## Slide notes

Read the introduction, then click Next to continue with the Account Setup process.

Slide 13 - of 40

The screenshot shows the 'Account Setup' page of the Workers' Compensation Set-Aside Web Portal. At the top, there are logos for CMS (Center for Medicare & Medicaid Services) and COB&R (Coordination of Benefits and Recovery). A navigation bar includes links for 'About This Site', 'CMS Links', 'How To...', 'Reference Materials', and 'Contact Us', along with a 'Skip Navigation' link. The main heading is 'Account Setup'. Below this, instructions state: 'Please enter the Account Identification Number (Account ID) and Personal Identification Number (PIN) sent to the account contact after completion of the New Registration step. We also ask for your E-mail address to see if you are already associated to another account on the WCMSA Web Portal. Existing users will not be allowed to be associated to multiple WCMSAP accounts. New users must go through the process of creating a Login ID and Password.' A 'QUICK HELP' box on the right contains a link 'Help About This Page'. A note indicates that an asterisk (\*) denotes a required field. The form includes four input fields: 'Account ID: \*', 'Personal Identification Number (PIN): \*', 'Account Manager's E-Mail Address: \*', and 'Re-enter E-Mail Address: \*'. At the bottom left, there are 'Previous' and 'Next' buttons.

Slide notes

The Account Setup page will display.

Slide 14 - of 40

The screenshot shows the 'Account Setup' page of the Workers' Compensation Set-Aside Web Portal. At the top, there are logos for CMS (Center for Medicare & Medicaid Services) and COB&R (Coordination of Benefits and Recovery). A navigation bar includes links for 'About This Site', 'CMS Links', 'How To...', 'Reference Materials', and 'Contact Us', along with a 'Skip Navigation' link. The main heading is 'Account Setup'. Below this, instructions state: 'Please enter the Account Identification Number (Account ID) and Personal Identification Number (PIN) sent to the account contact after completion of the New Registration step. We also ask for your E-mail address to see if you are already associated to another account on the WCMSA Web Portal. Existing users will not be allowed to be associated to multiple WCMSAP accounts. New users must go through the process of creating a Login ID and Password.' A 'QUICK HELP' box with a 'Help About This Page' link is on the right. Below the instructions, a note says 'An asterisk (\*) indicates a required field.' The form contains four fields: 'Account ID: \*', 'Personal Identification Number (PIN): \*', 'Account Manager's E-Mail Address: \*', and 'Re-enter E-Mail Address: \*'. At the bottom left are 'Previous' and 'Next' buttons.

Slide notes

This page requires the Account Manager to enter the Account ID and PIN that were mailed to the corporate Authorized Representative.

The Account Manager's e-mail address is also required in order to verify that he/she is an authorized user.

Slide 15 - of 40

The screenshot shows the 'Account Setup' page of the Workers' Compensation Set-Aside Web Portal. At the top left is the CMS logo (Center for Medicare & Medicaid Services) and the title 'Workers' Compensation Set-Aside Web Portal'. At the top right is the COB&R logo (Coordination of Benefits and Recovery). A navigation bar contains links for 'About This Site', 'CMS Links', 'How To...', 'Reference Materials', and 'Contact Us', with a 'Skip Navigation' link on the right. The main heading is 'Account Setup'. Below it, instructions state: 'Please enter the Account Identification Number (Account ID) and Personal Identification Number (PIN) sent to the account contact after completion of the New Registration step. We also ask for your E-mail address to see if you are already associated to another account on the WCMSA Web Portal. Existing users will not be allowed to be associated to multiple WCMSAP accounts. New users must go through the process of creating a Login ID and Password.' A 'QUICK HELP' button with the text 'Help About This Page' is on the right. Below the instructions, a note says 'An asterisk (\*) indicates a required field.' The form contains four required fields: 'Account ID: \*', 'Personal Identification Number (PIN): \*', 'Account Manager's E-Mail Address: \*', and 'Re-enter E-Mail Address: \*'. At the bottom left are 'Previous' and 'Next' buttons.

Slide notes

When this page is completed, click Next to continue.

Slide 16 - of 40

The screenshot shows the 'Account Setup' page of the Workers' Compensation Set-Aside Web Portal. At the top, there are logos for CMS (Center for Medicare & Medicaid Services) and COB&R (Coordination of Benefits and Recovery). A navigation bar contains links for 'About This Site', 'CMS Links', 'How To...', 'Reference Materials', and 'Contact Us', along with a 'Skip Navigation' link. The main heading is 'Account Setup'. Below this, there are two paragraphs of instructions: the first asks for the Account ID and PIN, and the second asks for an E-mail address. A 'QUICK HELP' button with a 'Help About This Page' link is on the right. Below the instructions, a note states that an asterisk (\*) indicates a required field. There are four input fields: 'Account ID: \*', 'Personal Identification Number (PIN): \*', 'Account Manager's E-Mail Address: \*', and 'Re-enter E-Mail Address: \*'. At the bottom left, there are 'Previous' and 'Next' buttons.

Slide notes

The system will validate the Account ID and PIN. If the Account ID and/or PIN are invalid, the system will display an error message.

Slide 17 - of 40

The screenshot shows the 'Account Setup' page of the Workers' Compensation Set-Aside Web Portal. At the top, there are logos for CMS (Center for Medicare & Medicaid Services) and COB&R (Coordination of Benefits and Recovery). A navigation bar includes links for 'About This Site', 'CMS Links', 'How To...', 'Reference Materials', and 'Contact Us', along with a 'Skip Navigation' link. The main heading is 'Account Setup'. Below this, instructions state: 'Please enter the Account Identification Number (Account ID) and Personal Identification Number (PIN) sent to the account contact after completion of the New Registration step. We also ask for your E-mail address to see if you are already associated to another account on the WCMSA Web Portal. Existing users will not be allowed to be associated to multiple WCMSAP accounts. New users must go through the process of creating a Login ID and Password.' A 'QUICK HELP' button with the text 'Help About This Page' is located on the right. Below the instructions, a note says 'An asterisk (\*) indicates a required field.' There are four input fields: 'Account ID: \*', 'Personal Identification Number (PIN): \*', 'Account Manager's E-Mail Address: \*', and 'Re-enter E-Mail Address: \*'. At the bottom left, there are 'Previous' and 'Next' buttons.

Slide notes

The system will also validate your e-mail address to determine if you already have a Login ID. If the system detects you are already associated with another WCMSAP account, as either an Account Manager or Account Designee, the system will prevent you from registering as the Account Manager for this account.

Slide 18 - of 40

The screenshot shows the 'Account Setup' page of the Workers' Compensation Set-Aside Web Portal. At the top, there are logos for CMS (Center for Medicare & Medicaid Services) and COB&R (Coordination of Benefits and Recovery). A navigation bar includes links for 'About This Site', 'CMS Links', 'How To...', 'Reference Materials', and 'Contact Us', along with a 'Skip Navigation' link. The main heading is 'Account Setup'. Below this, instructions state: 'Please enter the Account Identification Number (Account ID) and Personal Identification Number (PIN) sent to the account contact after completion of the New Registration step. We also ask for your E-mail address to see if you are already associated to another account on the WCMSA Web Portal. Existing users will not be allowed to be associated to multiple WCMSAP accounts. New users must go through the process of creating a Login ID and Password.' A 'QUICK HELP' button with the text 'Help About This Page' is located on the right. Below the instructions, a note says 'An asterisk (\*) indicates a required field.' The form contains four input fields: 'Account ID: \*', 'Personal Identification Number (PIN): \*', 'Account Manager's E-Mail Address: \*', and 'Re-enter E-Mail Address: \*'. At the bottom left, there are 'Previous' and 'Next' buttons.

Slide notes

Additionally, if the system detects that another user is already registered as the Account Manager for the same account you are trying to register for, the system will display an error message.

The error message will inform you that you cannot register and it will instruct you to contact the BCRC.

Slide 19 - of 40

<a href="#">Home</a>	<a href="#">About This Site</a>	<a href="#">CMS Links</a>	<a href="#">How To...</a>	<a href="#">Reference Materials</a>	<a href="#">Contact Us</a>	<a href="#">Logoff</a>
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## Account Setup - Company Information

<b>Corporate Information</b>	<b>Account Representative Information</b>
Employer Identification Number (EIN): #####	First Name: FIRST MI: M Last Name: LAST
Corporation Name: AAAAAAAAAAAAA	Phone### - ### - #### ext. ####
<b>Business Mailing Address:</b>	
Address Line 1: AAAAAAAAAAAAA	
Address Line 2: AAAAAAAAAAAAA	
City: AAAAAAAAAAAAA	
State: AAAAAAAAAAAAA	
Zip Code: ##### - #####	

**Slide notes**

If the system is able to validate all entered data, the Account Setup - Company Information page will display. This screen will be pre-filled with the company information entered during the initial Registration process.

Slide 20 - of 40

<a href="#">Home</a>	<a href="#">About This Site</a>	<a href="#">CMS Links</a>	<a href="#">How To...</a>	<a href="#">Reference Materials</a>	<a href="#">Contact Us</a>	<a href="#">Logout</a>
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## Account Setup - Company Information

<b>Corporate Information</b>	<b>Account Representative Information</b>
Employer Identification Number (EIN): #####	First Name: FIRST MI: M Last Name: LAST
Corporation Name: AAAAAAAAAAAAA	Phone### - ### - #### ext. ####
<b>Business Mailing Address:</b>	
Address Line 1: AAAAAAAAAAAAA	
Address Line 2: AAAAAAAAAAAAA	
City: AAAAAAAAAAAAA	
State: AAAAAAAAAAAAA	
Zip Code: ##### - #####	

**Slide notes**

Review the listed information. If any of this information is incorrect, contact an EDI Representative to have it corrected. Click Next to continue.

Slide 21 - of 40

The screenshot shows the 'Account Manager Personal Information' page. At the top, there are logos for CMS (Centers for Medicare & Medicaid Services) and COB&R (Coordination of Benefits and Recovery). A navigation bar includes links for 'About This Site', 'CMS Links', 'How To...', 'Reference Materials', and 'Contact Us'. A 'Skip Navigation' link is also present. The main heading is 'Account Manager Personal Information'. Below this, a 'QUICK HELP' button with the text 'Help About This Page' is visible. A message states: 'Please click this button if information is identical to that provided during initial registration.' Below this is a 'Same as Submitter' button. A note says: 'An asterisk (\*) indicates a required field.' The form fields are: First Name: \* (text box), MI: (text box), Last Name: \* (text box), E-mail Address: \* (text box), Phone: \* (text boxes for area, exchange, number, and extension), Mailing Address: Address Line 1: \* (text box), Address Line 2: (text box), City: \* (text box, containing 'OWINGS MILLS'), State: \* (dropdown menu, containing 'Maryland'), and Zip Code: \* (text boxes for zip and zip+4). At the bottom, a paragraph reads: 'You must read the User Agreement provided in the scrolling box. To accept the agreement, click the checkbox. You must accept and agree to the terms of the User Agreement in order to continue through the registration process.'

Slide notes

The Account Manager Personal Information page will display. The information entered on this page is required for subsequent communications. All fields denoted by an asterisk (\*) are required.

Slide 22 - of 40

The screenshot shows the 'Account Manager Personal Information' page. At the top, there are logos for CMS (Centers for Medicare & Medicaid Services) and COB&R (Coordination of Benefits and Recovery). A navigation bar includes links for 'About This Site', 'CMS Links', 'How To...', 'Reference Materials', and 'Contact Us', along with a 'Skip Navigation' link. The main heading is 'Account Manager Personal Information'. Below this, a 'QUICK HELP' button is visible with a 'Help About This Page' link. A message states: 'Please click this button if information is identical to that provided during initial registration.' Below this is a 'Same as Submitter' button. A note says: 'An asterisk (\*) indicates a required field.' The form fields include: 'First Name: \*', 'MI: \*', 'Last Name: \*', 'E-mail Address: \*', 'Phone: \*' (with area, exchange, and extension fields), 'Mailing Address:' section with 'Address Line 1: \*', 'Address Line 2:', 'City: \*' (populated with 'OWINGS MILLS'), 'State: \*' (populated with 'Maryland' and a dropdown arrow), and 'Zip Code: \*' (with five-digit and four-digit fields). At the bottom, a paragraph reads: 'You must read the User Agreement provided in the scrolling box. To accept the agreement, click the checkbox. You must accept and agree to the terms of the User Agreement in order to continue through the registration process.'

Slide notes

The e-mail Address field will be populated with the Account Manager e-mail address that was entered on the Account Setup page.

Slide 23 - of 40

The screenshot shows the 'Account Manager Personal Information' page. At the top, there are logos for CMS (Centers for Medicare & Medicaid Services) and COB&R (Coordination of Benefits and Recovery). A navigation bar includes links for 'About This Site', 'CMS Links', 'How To...', 'Reference Materials', and 'Contact Us'. A 'Skip Navigation' link is also present. The main heading is 'Account Manager Personal Information'. Below this, there is a 'QUICK HELP' button with a 'Help About This Page' link. A text instruction says: 'Please click this button if information is identical to that provided during initial registration.' Below this is a 'Same as Submitter' button. A note states: 'An asterisk (\*) indicates a required field.' The form fields include: 'First Name: \*', 'MI: \*', 'Last Name: \*', 'E-mail Address: \*', 'Phone: \*' (with area, exchange, and extension fields), 'Mailing Address:' section with 'Address Line 1: \*', 'Address Line 2:', 'City: \*' (pre-filled with 'OWINGS MILLS'), 'State: \*' (pre-filled with 'Maryland' and a dropdown arrow), and 'Zip Code: \*' (with five-digit and four-digit fields). At the bottom, a paragraph reads: 'You must read the User Agreement provided in the scrolling box. To accept the agreement, click the checkbox. You must accept and agree to the terms of the User Agreement in order to continue through the registration process.'

Slide notes

Enter the required personal information.

## Slide 24 - of 40

You must read the User Agreement provided in the scrolling box. To accept the agreement, click the checkbox. You must accept and agree to the terms of the User Agreement in order to continue through the registration process.

[View and print the agreement below](#)

**User Agreement**

**1. Purpose of Workers' Compensation Medicare Set-Aside Portal (WCMSAP) Sec**

The Workers' Compensation Medicare Set-Aside Portal (WCMSAP) will allow for the compensation Medicare Set-Aside arrangement (WCMSA) proposals for future medi introduction of a WCMSAP web portal, WCMSA submitters will receive prompt and c

Please check the following box:

I accept the User Agreement and Privacy Policy above

**Slide notes**

When the Account Manager information has been entered, scroll down to view the User Agreement and Privacy Policy. Accept the User Agreement, then click Next.

The system requires you to click "I accept" in order to continue the Account Setup.

Note: You can register as an Account Manager for an account if you are already a registered Medicare, Medicaid, and SCHIP Extension Act of 2007 (MMSEA) Mandatory Reporting user.

Slide 25 - of 40

You must read the User Agreement provided in the scrolling box. To accept the agreement, click the checkbox. You must accept and agree to the terms of the User Agreement in order to continue through the registration process.

[View and print the agreement below](#)

**User Agreement**

**1. Purpose of Workers' Compensation Medicare Set-Aside Portal (WCMSAP) Sec**

The Workers' Compensation Medicare Set-Aside Portal (WCMSAP) will allow for the compensation Medicare Set-Aside arrangement (WCMSA) proposals for future medi introduction of a WCMSAP web portal, WCMSA submitters will receive prompt and c

Please check the following box:

I accept the User Agreement and Privacy Policy above

**Slide notes**

The system will confirm that all required fields have been entered before allowing you, the Account Manager, to continue with the Account Setup process.

The system will display an error message if you submit incomplete or invalid information (i.e., the entered information does not pass the WCMSAP edits).

## Slide 26 - of 40

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

## Account Manager Login Information

The security information requested on this page will allow the system to authenticate your identity each time you log on. This will ensure only you are provided the access and updating privileges restricted to the Account Manager.

Choose your Login ID and password carefully.

- Password must be changed every sixty (60) days.
- Password must consist of at least eight (8) characters.
- Password must contain at least one upper-case letter, one lower-case letter, one number, and one special character.
- Password must contain a minimum of four (4) changed characters from the previous password.
- Password cannot be changed more than once per day.
- Password must be different from the previous 6 passwords.
- Password cannot contain a reserved word (See Help About This Page for a complete list)

An asterisk (\*) indicates a required field.

Login ID \*

Password \*

Re-enter Password \*

The Security Questions allow you to regain account access if you forget your password. Please note the answers you provide to these questions should be actual answers and not hints for your password.

Choose Security Questions and Provide Answers

Security Question 1 \*

Answer 1 \*

Security Question 2 \*

Answer 2 \*

**QUICK HELP**  
[Help About This Page](#)

## Slide notes

If you are a new user, the Account Manager Login Information page displays.

Note: If you have already registered to use the WCMSAP, this page will not display and you will not be prompted to create a Login ID and Password.

Slide 27 - of 40

## Login ID and Password

- Login ID
  - Must be 7 characters
  - Must be in the format of AA999AA
  - Cannot be same as Password
- Password
  - Must be changed every 60 days
  - Must be 8 characters in length
  - Must contain at least one upper case letter, one lower case letter, one number, and one special character
  - Cannot be changed more than once per day
  - Cannot contain 4 consecutive characters from previous password
  - Must be different from last 6 passwords
  - Cannot contain a reserved word

### Slide notes

New users must set up a Login ID and Password (using the following guidelines): Login IDs must be 7 characters, Login IDs must be in the format of AA999AA, login ID and password cannot be the same, passwords must be changed every 60 days,

passwords must be 8 characters in length, passwords must contain at least one upper case letter, one lower case letter, one number, and one special character, passwords cannot be changed more than once per day,

passwords cannot contain 4 consecutive characters from the previous password, passwords must be different from the last 6 passwords, and passwords cannot contain a reserved word.

The updated Reserved Words List can be referenced in the latest WCMSAP User Guide.

## Slide 28 - of 40

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

## Account Manager Login Information

The security information requested on this page will allow the system to authenticate your identity each time you log on. This will ensure only you are provided the access and updating privileges restricted to the Account Manager.

**QUICK HELP**  
[Help About This Page](#)

Choose your Login ID and password carefully.

- Password must be changed every sixty (60) days.
- Password must consist of at least eight (8) characters.
- Password must contain at least one upper-case letter, one lower-case letter, one number, and one special character.
- Password must contain a minimum of four (4) changed characters from the previous password.
- Password cannot be changed more than once per day.
- Password must be different from the previous 6 passwords.
- Password cannot contain a reserved word (See Help About This Page for a complete list)

An asterisk (\*) indicates a required field.

Login ID \*

Password \*

Re-enter Password \*

The Security Questions allow you to regain account access if you forget your password. Please note the answers you provide to these questions should be actual answers and not hints for your password.

Choose Security Questions and Provide Answers

Security Question 1 \*

Answer 1 \*

Security Question 2 \*

Answer 2 \*

## Slide notes

The security information requested on this page will allow the system to authenticate your identity each time you log in to the WCMSAP. Choose your Login ID and Password carefully.

## Slide 29 - of 40

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

## Account Manager Login Information

The security information requested on this page will allow the system to authenticate your identity each time you log on. This will ensure only you are provided the access and updating privileges restricted to the Account Manager.

Choose your Login ID and password carefully.

- Password must be changed every sixty (60) days.
- Password must consist of at least eight (8) characters.
- Password must contain at least one upper-case letter, one lower-case letter, one number, and one special character.
- Password must contain a minimum of four (4) changed characters from the previous password.
- Password cannot be changed more than once per day.
- Password must be different from the previous 6 passwords.
- Password cannot contain a reserved word (See Help About This Page for a complete list)

An asterisk (\*) indicates a required field.

Login ID \*

Password \*

Re-enter Password \*

The Security Questions allow you to regain account access if you forget your password. Please note the answers you provide to these questions should be actual answers and not hints for your password.

Choose Security Questions and Provide Answers

Security Question 1 \*

Answer 1 \*

Security Question 2 \*

Answer 2 \*

**Slide notes**

Create your Login ID, and enter and re-enter a Password. You will use your Login ID and Password to enter the WCMSAP site and manage the account, manage designees, create and view cases, and upload file attachments.

The Security Questions will allow you to access your Login ID and reset your Password in the event you forget either one.

## Slide 30 - of 40

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

## Account Manager Login Information

The security information requested on this page will allow the system to authenticate your identity each time you log on. This will ensure only you are provided the access and updating privileges restricted to the Account Manager.

Choose your Login ID and password carefully.

- Password must be changed every sixty (60) days.
- Password must consist of at least eight (8) characters.
- Password must contain at least one upper-case letter, one lower-case letter, one number, and one special character.
- Password must contain a minimum of four (4) changed characters from the previous password.
- Password cannot be changed more than once per day.
- Password must be different from the previous 6 passwords.
- Password cannot contain a reserved word (See Help About This Page for a complete list)

An asterisk (\*) indicates a required field.

Login ID \*

Password \*

Re-enter Password \*

The Security Questions allow you to regain account access if you forget your password. Please note the answers you provide to these questions should be actual answers and not hints for your password.

Choose Security Questions and Provide Answers

Security Question 1 \*

Answer 1 \*

Security Question 2 \*

Answer 2 \*

## Slide notes

When you have completed the Account Manager Login Information page, click Next to continue.

Slide 31 - of 40

The screenshot shows the 'Account Manager Summary' page. At the top, there are logos for CMS (Center for Medicare & Medicaid Services) and COB&R (Coordination of Benefits and Recovery). A navigation bar includes links for 'About This Site', 'CMS Links', 'How To...', 'Reference Materials', and 'Contact Us', along with a 'Skip Navigation' link. The main heading is 'Account Manager Summary'. Below this, a paragraph of instructions reads: 'Please review your personal and login information. If you need to change the information, click the 'Edit' button. If you are satisfied with the information click the 'Submit Account Setup' button to submit your information. Click 'Cancel' to cancel the setup process; all data will be lost. Please print this page for your records.' To the right of this text is a 'QUICK HELP' box with a 'Help About This Page' link. The form is divided into two sections: 'Personal Information' and 'Login ID'. The 'Personal Information' section includes fields for First Name, MI, Last Name, E-Mail Address, and Phone (with an extension field). The 'Login ID' section has a single field. Below these is the 'Mailing Address' section with fields for Address Line 1, Address Line 2, City, State, and Zip Code. At the bottom of the form are three buttons: 'Previous', 'Submit Account Setup', and 'Cancel'.

Slide notes

The Account Manager Summary page will display next. This page shows all of the information entered during Account Setup.

Slide 32 - of 40

The screenshot shows the 'Account Manager Summary' page of the CMS Workers' Compensation Set-Aside Web Portal. The page header includes the CMS logo, the portal title, and the COB&R logo. A navigation bar contains links for 'About This Site', 'CMS Links', 'How To...', 'Reference Materials', and 'Contact Us', along with a 'Skip Navigation' link. The main content area is titled 'Account Manager Summary' and contains a paragraph of instructions: 'Please review your personal and login information. If you need to change the information, click the 'Edit' button. If you are satisfied with the information click the 'Submit Account Setup' button to submit your information. Click 'Cancel' to cancel the setup process; all data will be lost. Please print this page for your records.' To the right of this text is a 'QUICK HELP' box with a 'Help About This Page' link. Below the instructions are two sections: 'Personal Information' and 'Login ID'. Each section has an 'Edit' button. The 'Personal Information' section includes fields for First Name, MI, Last Name, E-Mail Address, and Phone (with an 'ext.' field). The 'Login ID' section has a single 'Login ID' field. Below these is the 'Mailing Address' section with fields for Address Line 1, Address Line 2, City, State, and Zip Code. At the bottom of the form are three buttons: 'Previous', 'Submit Account Setup', and 'Cancel'.

Slide notes

All information should be reviewed and verified before continuing. You may return to specific sections to correct or change the previously entered information by clicking the Edit button next to the section that needs to be modified.

Slide 33 - of 40

An asterisk (\*) indicates a required field.

Login ID \*

Password \*

Re-enter Password \*

The Security Questions allow you to regain account access if you forget your password. Please note the answers you provide to these questions should be actual answers and not hints for your password.

Choose Security Questions and Provide Answers

Security Question 1 \*

Answer 1 \*

Security Question 2 \*

Answer 2 \*

Slide notes

This will return you to the applicable page (Personal Information, Mailing Address or Login ID) to make modifications. Once all corrections have been made, click Next at the bottom of that page to navigate back to the Account Manager Summary page.

Slide 34 - of 40

The screenshot shows the 'Account Manager Summary' page of the Workers' Compensation Set-Aside Web Portal. The page header includes the CMS logo (Center for Medicare & Medicaid Services) and the COB&R logo (Coordination of Benefits and Recovery). A navigation bar contains links for 'About This Site', 'CMS Links', 'How To...', 'Reference Materials', and 'Contact Us', along with a 'Skip Navigation' link. The main content area is titled 'Account Manager Summary' and contains a paragraph of instructions: 'Please review your personal and login information. If you need to change the information, click the 'Edit' button. If you are satisfied with the information click the 'Submit Account Setup' button to submit your information. Click 'Cancel' to cancel the setup process; all data will be lost. Please print this page for your records.' To the right of this text is a 'QUICK HELP' box with a 'Help About This Page' link. Below the instructions are two sections: 'Personal Information' and 'Login ID'. Each section has an 'Edit' button. The 'Personal Information' section includes fields for First Name, MI, Last Name, E-Mail Address, and Phone (with an 'ext.' field). The 'Login ID' section has a 'Login ID' field. Below these is the 'Mailing Address' section with fields for Address Line 1, Address Line 2, City, State, and Zip Code. At the bottom of the form are three buttons: 'Previous', 'Submit Account Setup', and 'Cancel'.

Slide notes

After you have verified that all entered information is correct, click the Submit Account Setup button to submit the information.

## Slide 35 - of 40

[Skip Navigation](#)

[About This Site](#)   [CMS Links](#)   [How To...](#)   [Reference Materials](#)   [Contact Us](#)

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## Thank You

 [Print this page](#)

You have successfully completed the Account Setup for the Workers' Compensation Medicare Set-Aside Web site and established yourself as the Account Manager for the Account ID. Please print this page for your records.

### Next Steps

You may return to the Workers' Compensation Medicare Set-Aside Web site Welcome page, login using the Login ID and Password you just created to access accounts associated to your ID.

Please note: when returning your profile to the COBVA mailbox, please write "WCMSAP Profile Report" in the subject line. This is so the EDI Reps responsible for routing COBVA messages know to who they should send profile reports.

You can visit the Workers' Compensation Medicare Set Aside page at [Workers' Compensation Set-Aside Welcome Page](#)

**Slide notes**

The system will display a Thank You page with instructions for your next steps after successful Account Setup.

## Slide 36 - of 40

Skip Navigation

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

## Thank You

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 [Print this page](#)

You have successfully completed the Account Setup for the Workers' Compensation Medicare Set-Aside Web site and established yourself as the Account Manager for the Account ID. Please print this page for your records.

### Next Steps

You may return to the Workers' Compensation Medicare Set-Aside Web site Welcome page, login using the Login ID and Password you just created to access accounts associated to your ID.

Please note: when returning your profile to the COBVA mailbox, please write "WCMSAP Profile Report" in the subject line. This is so the EDI Reps responsible for routing COBVA messages know to who they should send profile reports.

You can visit the Workers' Compensation Medicare Set Aside page at [Workers' Compensation Set-Aside Welcome Page](#)

**Slide notes**

Click the Workers' Compensation Medicare Set-Aside Welcome Page link to return to the Welcome page.

Slide 37 - of 40

## Next Steps

- Account Setup complete
- Registered as Account Manager
  - Control administration of WCMSAP account
- Account Manager will receive Profile Report from BCRC via e-mail
  - Review, sign, and return to BCRC
  - Cannot submit, view or create cases until the signed Profile Report is received by the BCRC
- Login to the account to maintain account and case information, upload and replace documents, submit cases, and manage Designee access
- You may manage the entire account or invite other company employees to assist as Account Designees
  - Login to the WCMSAP site using the Login ID and Password you created during the Account Setup process to add Designees

### Slide notes

You have successfully setup the account and registered yourself as the Account Manager. As the Account Manager, you control the administration of the WCMSAP account.

You will receive a Profile Report from the BCRC via e-mail, which must be reviewed for accuracy then signed and returned to the BCRC. You cannot submit, view, or create cases until the signed Profile Report is received by the BCRC.

After the report has been received by the BCRC, you can login to the account to maintain account and case information, upload and replace documents, submit cases, and manage Designee access.

You may choose to manage the entire account or you may invite other company employees to assist as Account Designees.

To add Designees, you must login to the WCMSAP site using the Login ID and Password you created during the Account Setup process.

Slide 38 - of 40

## Next Steps

- E-mail notification sent to you and Account Representative
  - Includes Profile Report
    - All information previously recorded during registration
    - Additional information provided during Account Setup
  - Contact the EDI Department if you do not receive Profile Report after 10 business days
- You or Account Representative will have 60 business days to review, sign, and return Profile Report to BCRC
  - When returning the signed Profile Report via e-mail, use “WCMSAP Profile Report” in the subject line
  - If not received within timeframe, account will be deleted on the 60th business day and you must restart registration process over

### Slide notes

Upon completion of all information for the Account Setup, an e-mail notification will be sent to you and the Account Representative. The e-mail will also include a Profile Report, noting all information previously recorded during registration,

and any additional information provided during the Account Setup. It may take up to 10 business days to receive the Profile Report. Contact the EDI Department if you do not receive a Profile Report after 10 business days.

You or the Account Representative will have 60 business days to review, sign, and return the Profile Report to the BCRC. When returning the signed Profile Report via e-mail, use “WCMSAP Profile Report” in the subject line.

If a signed Profile Report is not received within that timeframe, the account will be automatically deleted on the 60th business day. If the account is deleted, you must start the registration process from the beginning.

## Slide 39 - of 40



You have completed the WCMSAP Account Setup course. The information in this course can be referenced by using the document at the link below:

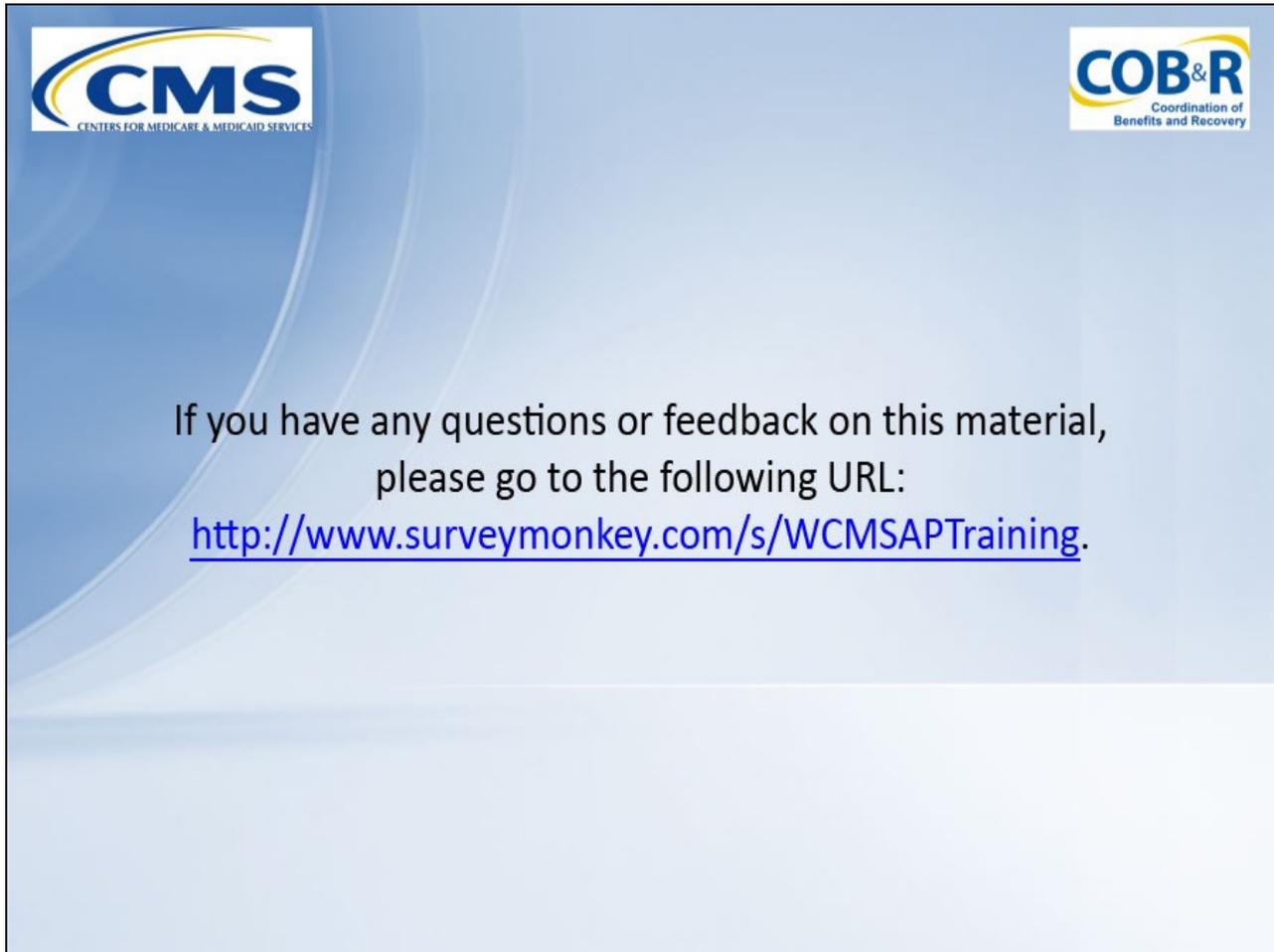
<https://www.cob.cms.hhs.gov/WCMSA/help/userManual/WCMSAUserManual.pdf> .

**Slide notes**

You have completed the WCMSAP Account Setup course. The information in this course can be referenced by using the document at the link below:

<https://www.cob.cms.hhs.gov/WCMSA/help/userManual/WCMSAUserManual.pdf>.

Slide 40 - of 40



The slide features a light blue background with a white curved graphic on the left side. In the top left corner is the CMS logo (Centers for Medicare & Medicaid Services). In the top right corner is the COB&R logo (Coordination of Benefits and Recovery). The main text is centered and reads: "If you have any questions or feedback on this material, please go to the following URL: <http://www.surveymonkey.com/s/WCMSAPTraining>."

**Slide notes**

If you have any questions or feedback on this material, please go to the following URL:  
<http://www.surveymonkey.com/s/WCMSAPTraining>.