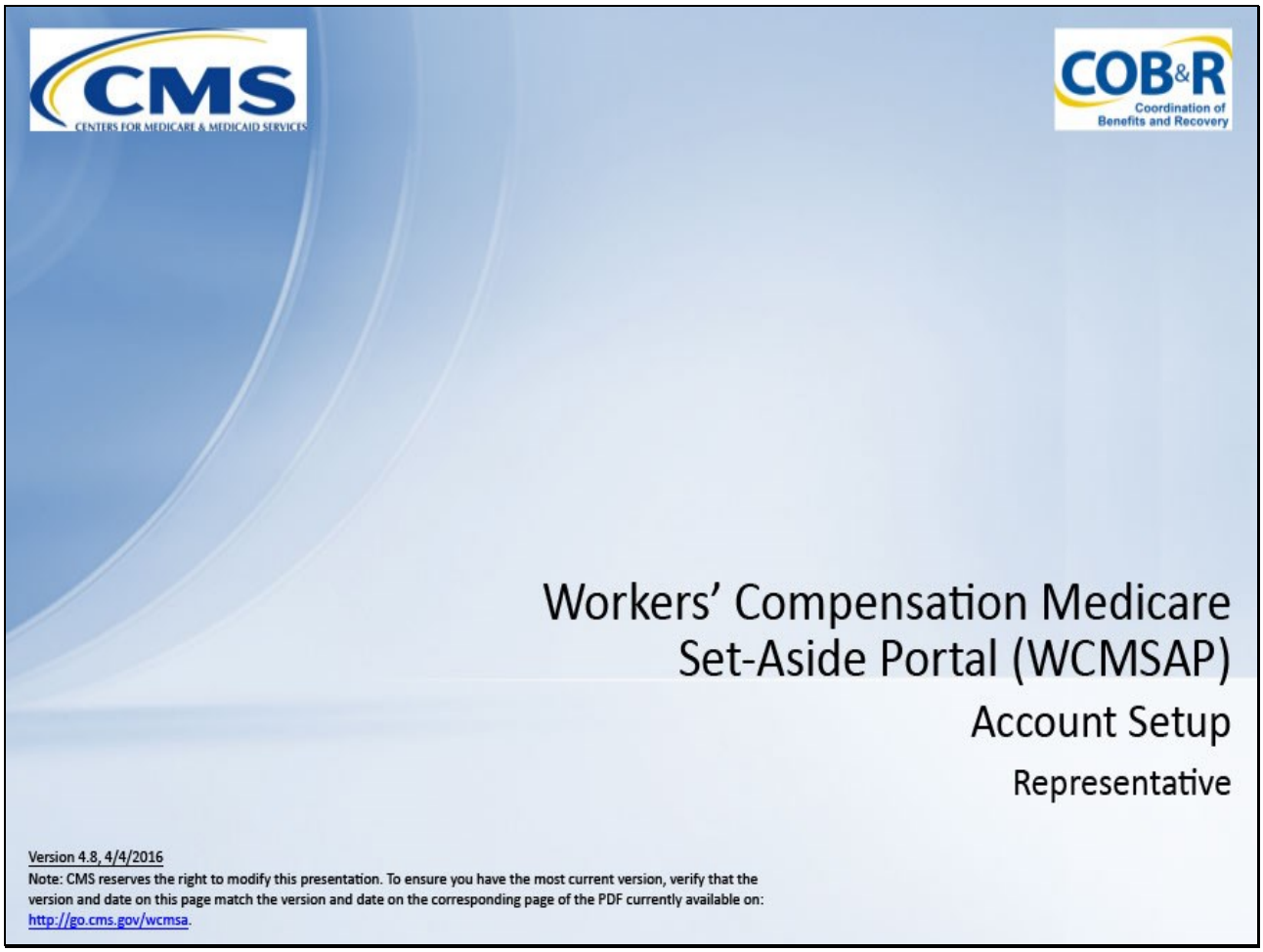
Slide 1 - of 23



Slide notes

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

Note: This module is for the Account Manager of the representative account.

A representative account indicates that the submitter is registering as a non-corporate entity with no Employer Identification Number (EIN), but will be submitting multiple 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 [CC] button in the lower right hand corner of the screen.

Slide 2 - of 23

Disclaimer

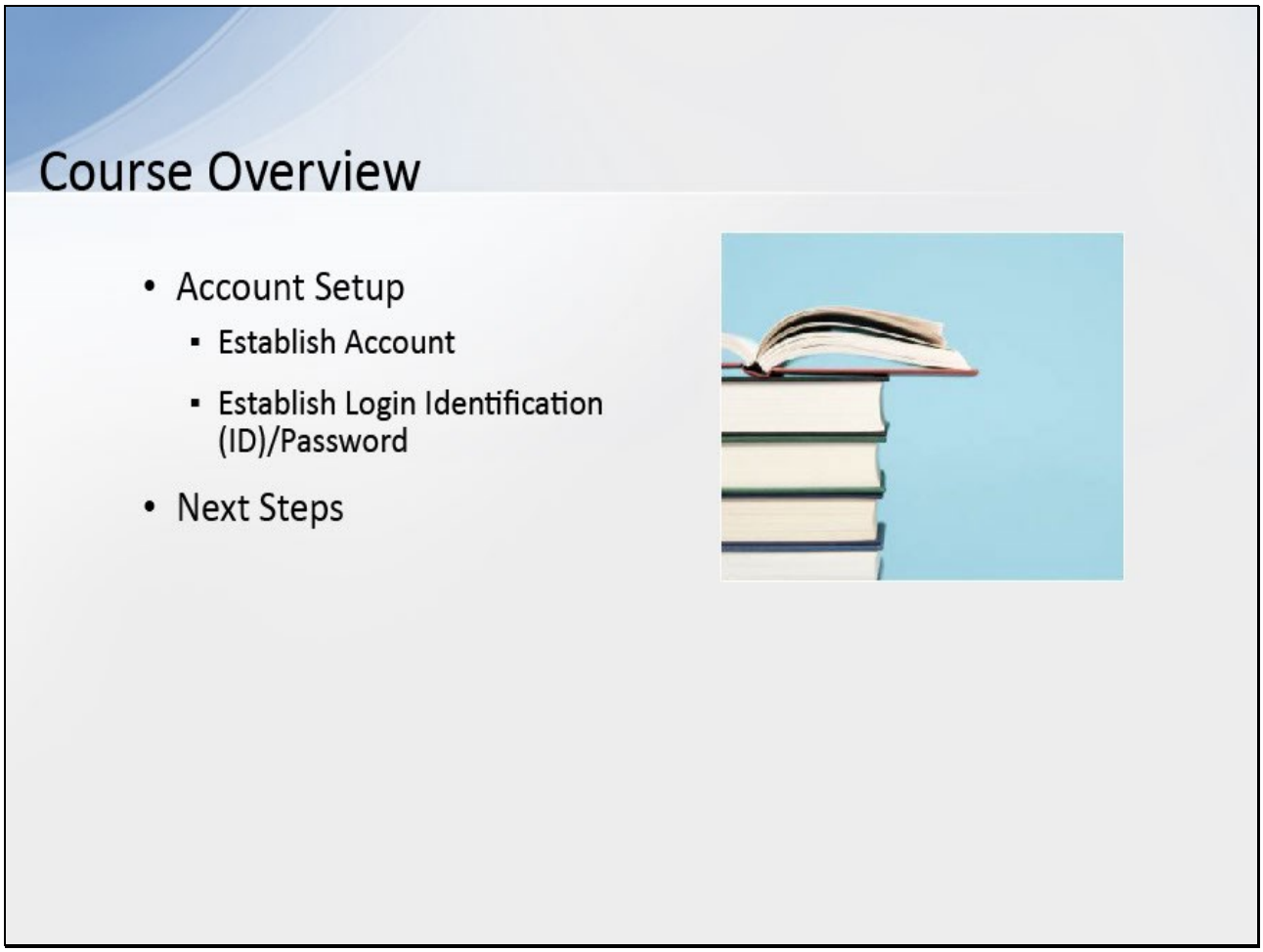
While all information in this document is believed to be correct at the time of writing, this Computer Based Training (CBT) is for educational purposes only and does not constitute official Centers for Medicare & Medicaid Services (CMS) instructions for the WCMSAP. All affected entities are responsible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

Slide 3 - of 23

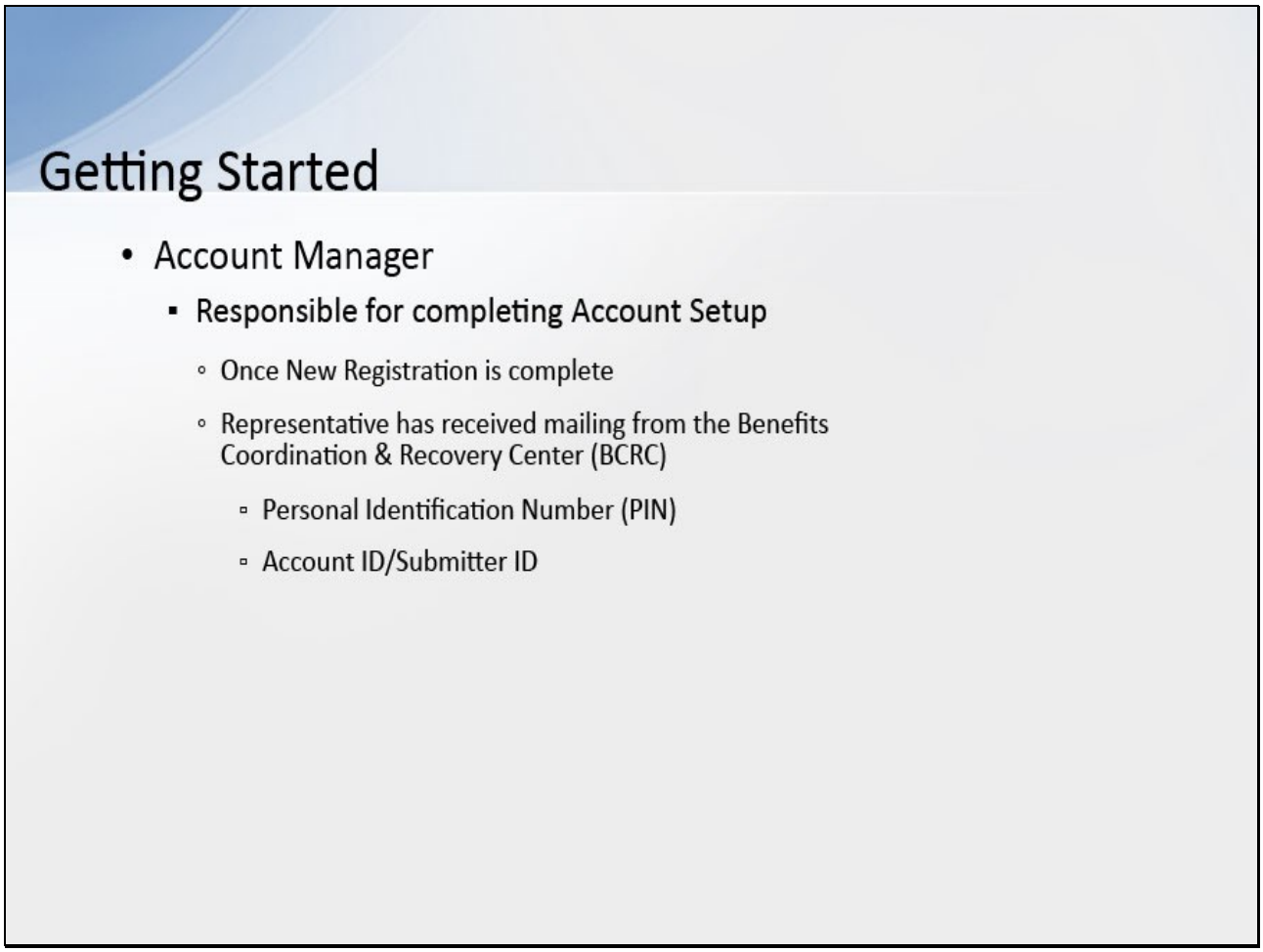


Slide notes

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 23



Slide notes

The Account Manager is responsible for completing the Account Setup once the New Registration step is completed and the representative has received a mailing from

the Benefits Coordination & Recovery Center (BCRC) containing the Personal Identification Number (PIN) and Account ID/Submitter ID.

Upon receipt of the Account ID and PIN, you can provide the information to a designated Account Manager, or assign yourself to this role.

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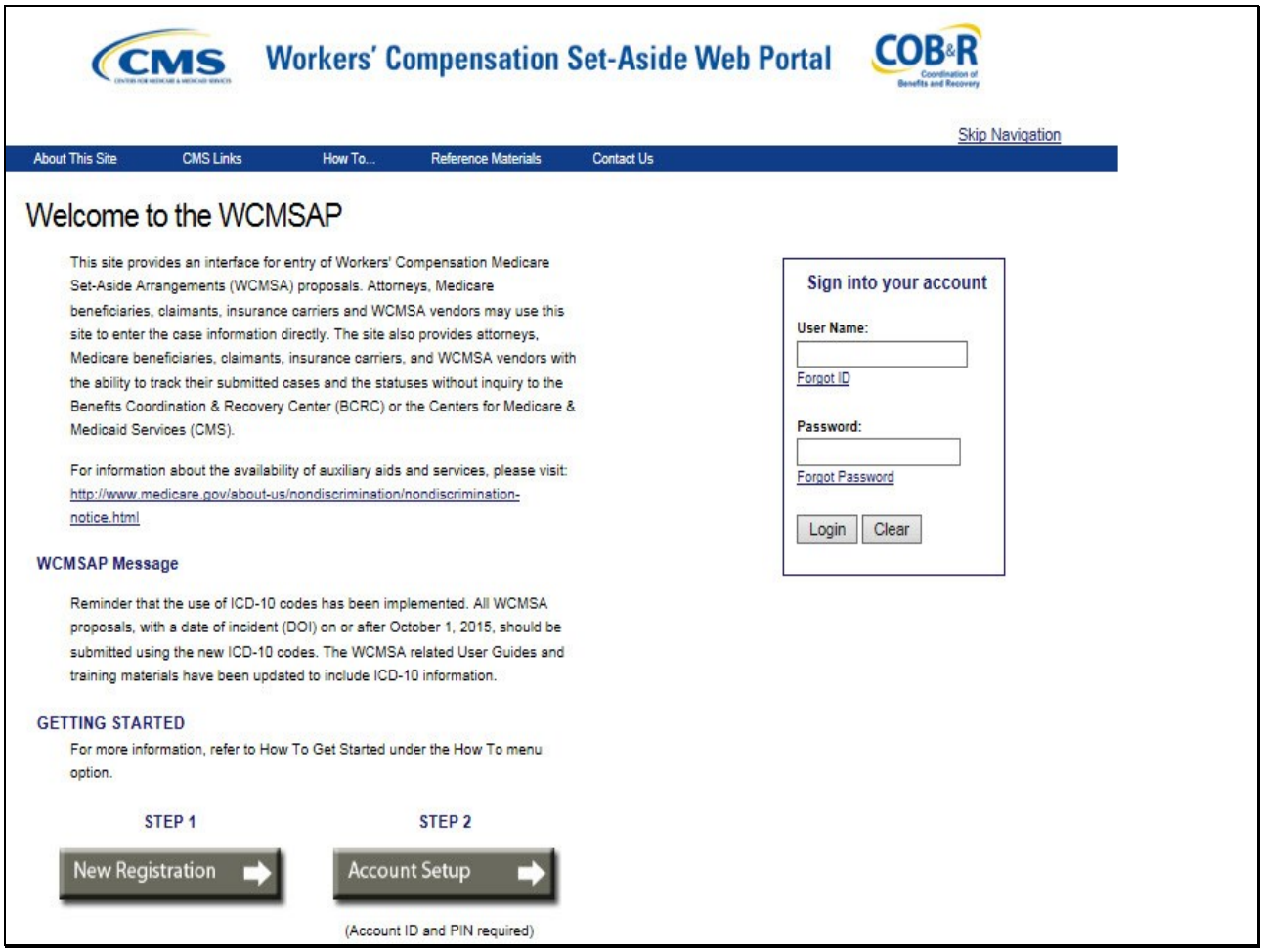

Slide notes

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.

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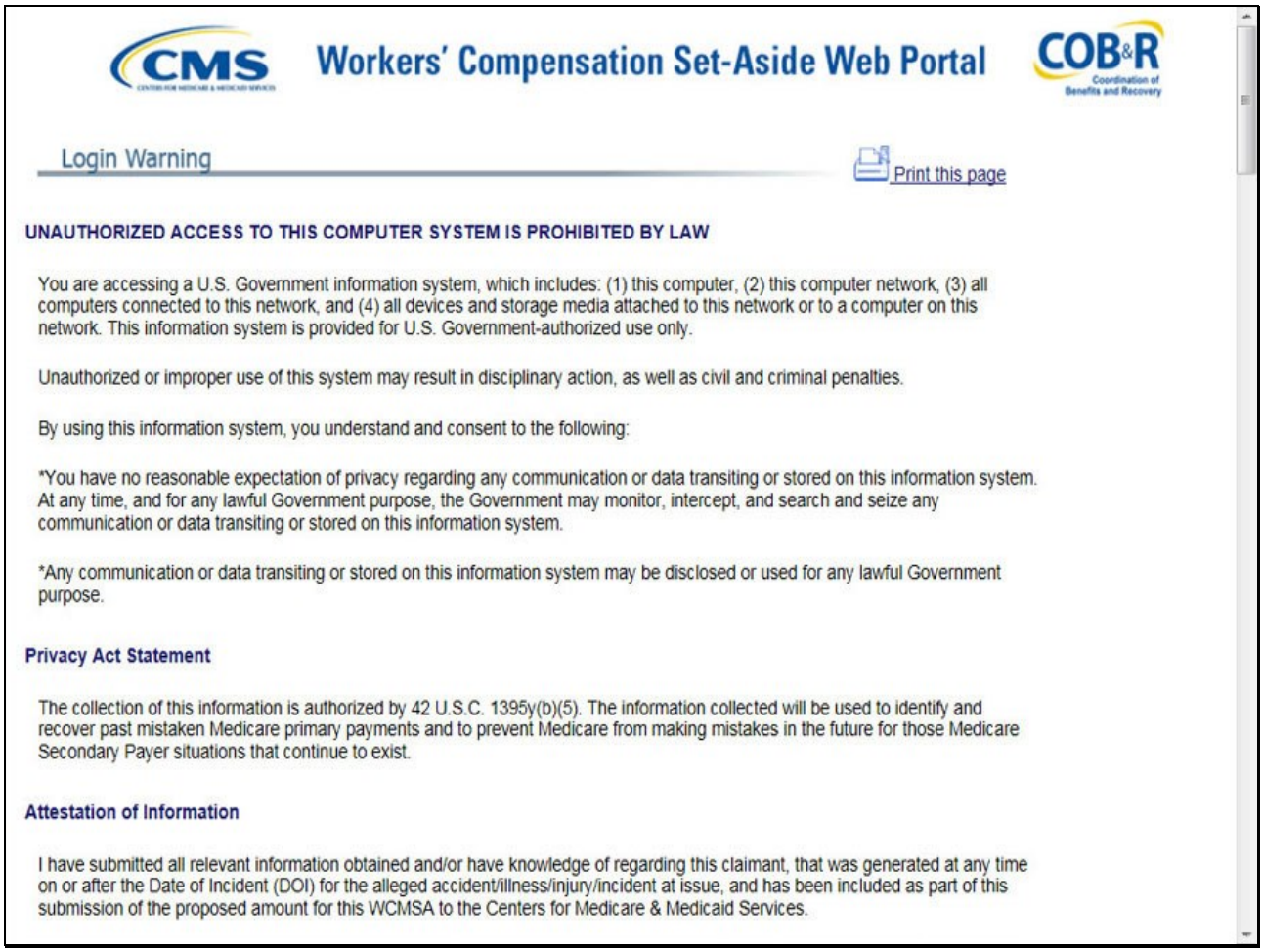

Workers' Compensation Set-Aside Web Portal

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.

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.

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 7 - of 23

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.

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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.

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.

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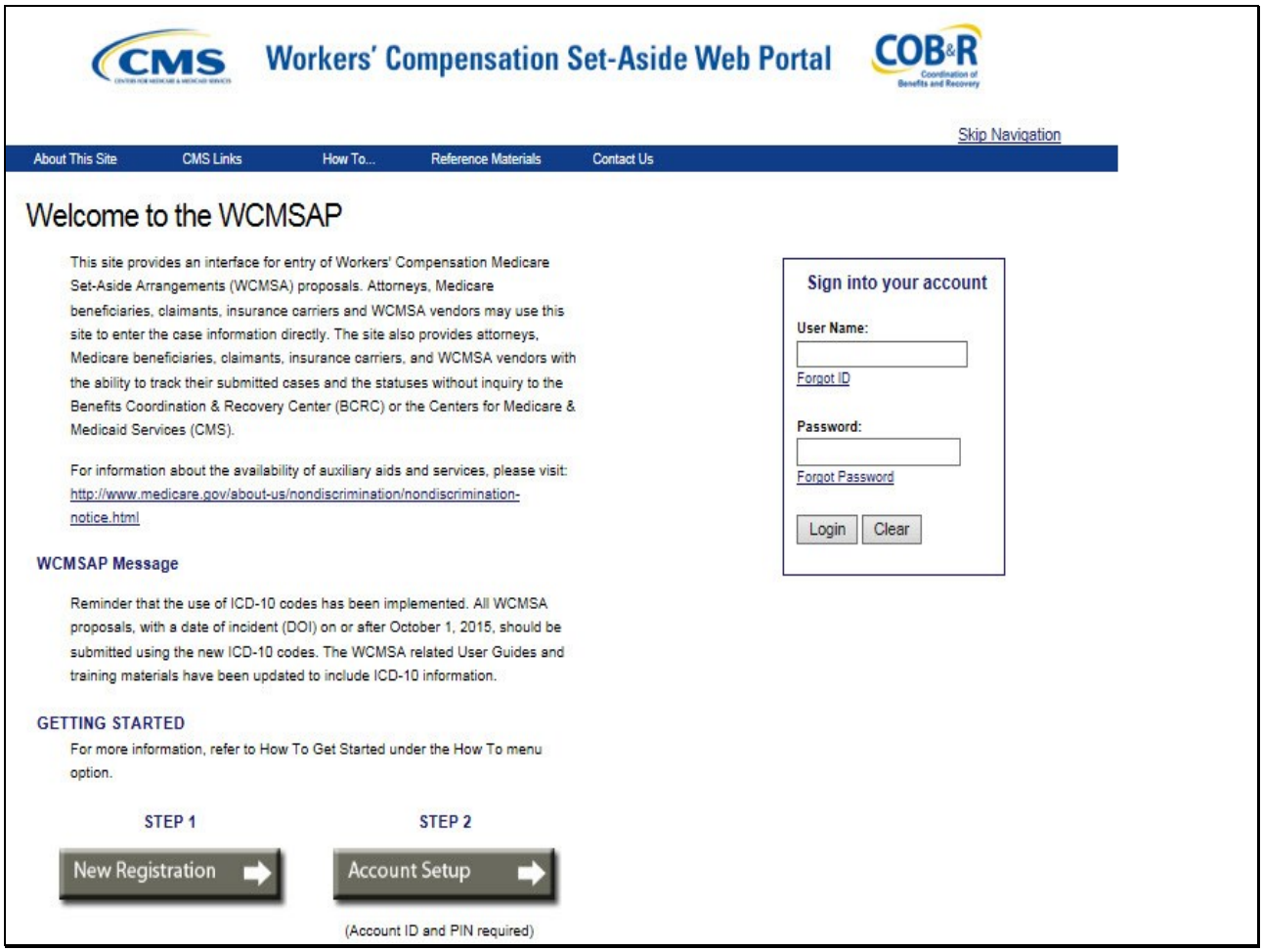

Slide notes

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

To begin the next step in the registration process, click Account Setup.

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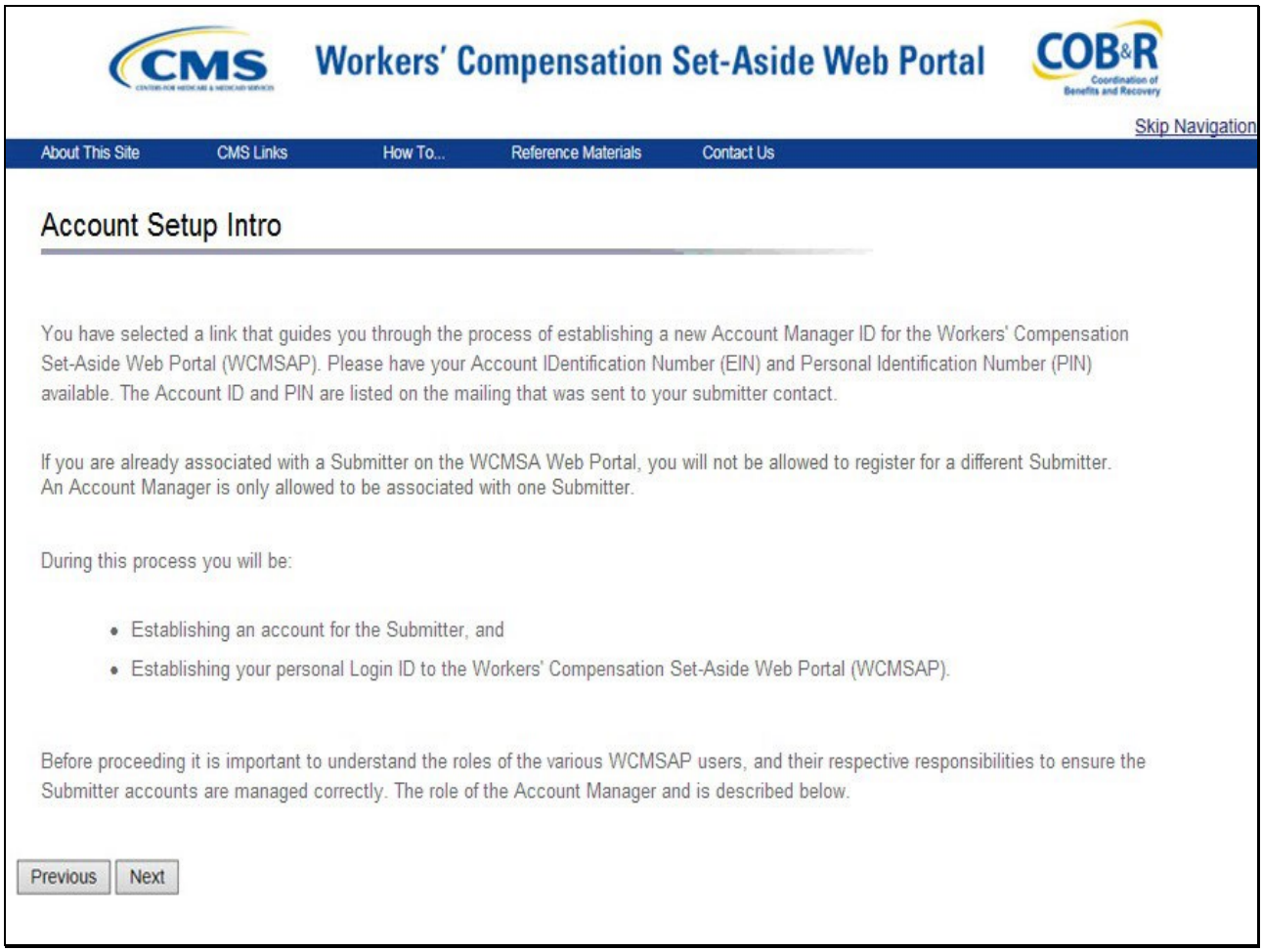

Slide notes

The Account Setup Intro page will display. This page describes the Account Setup process and the role of the Account Manager.

As the Account Manager, you will establish and administer your WCMSAP account. Click Next to continue.

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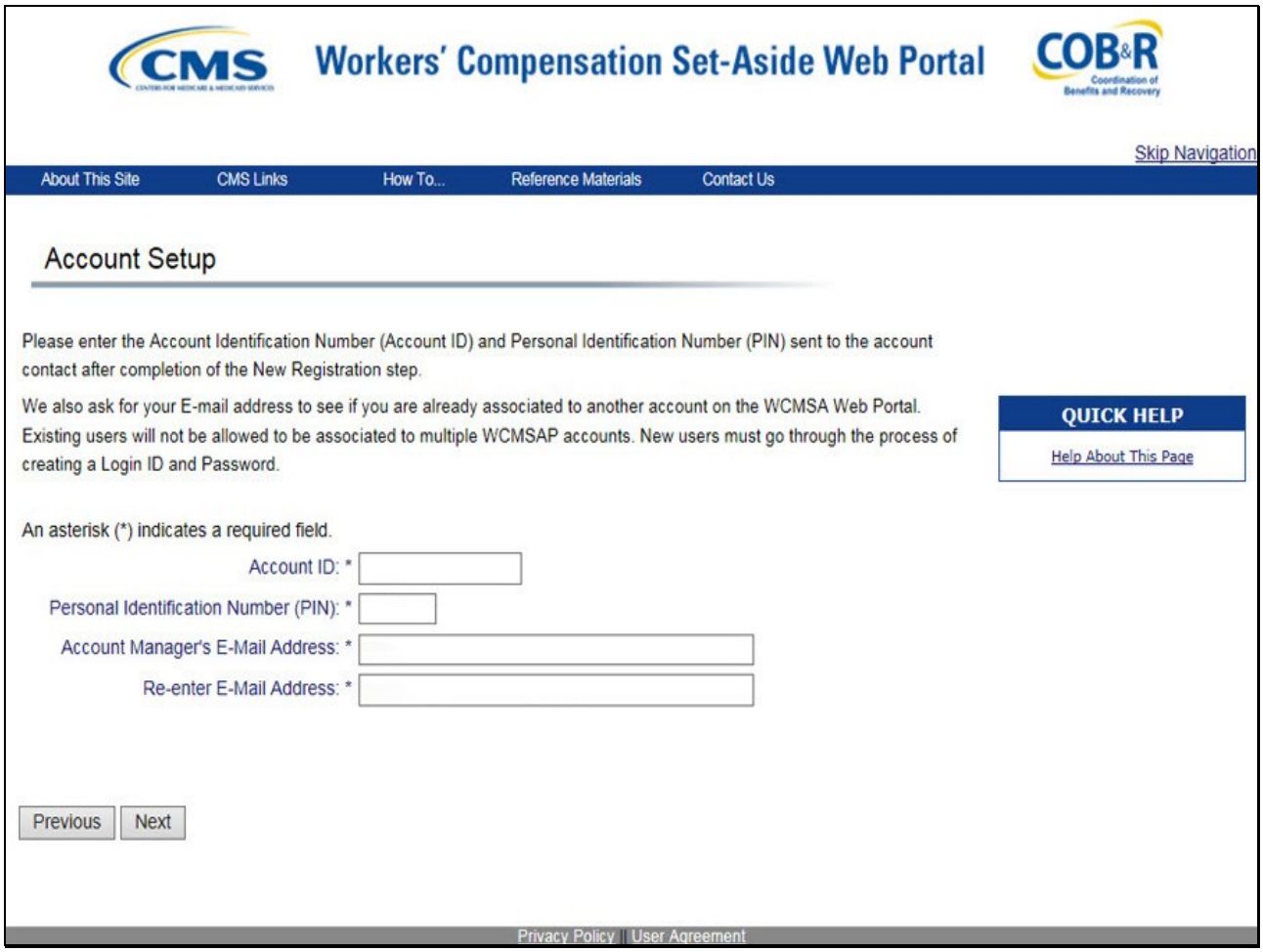

Slide notes

The Account Setup page will display.

This page requires you to enter the Account ID and PIN for this representative account.

Your e-mail address is also required in order to verify that you are a registered user. Your e-mail address must be entered twice.

Note: If the e-mail address you enter is found in the system, you will be prohibited from continuing the account setup process.

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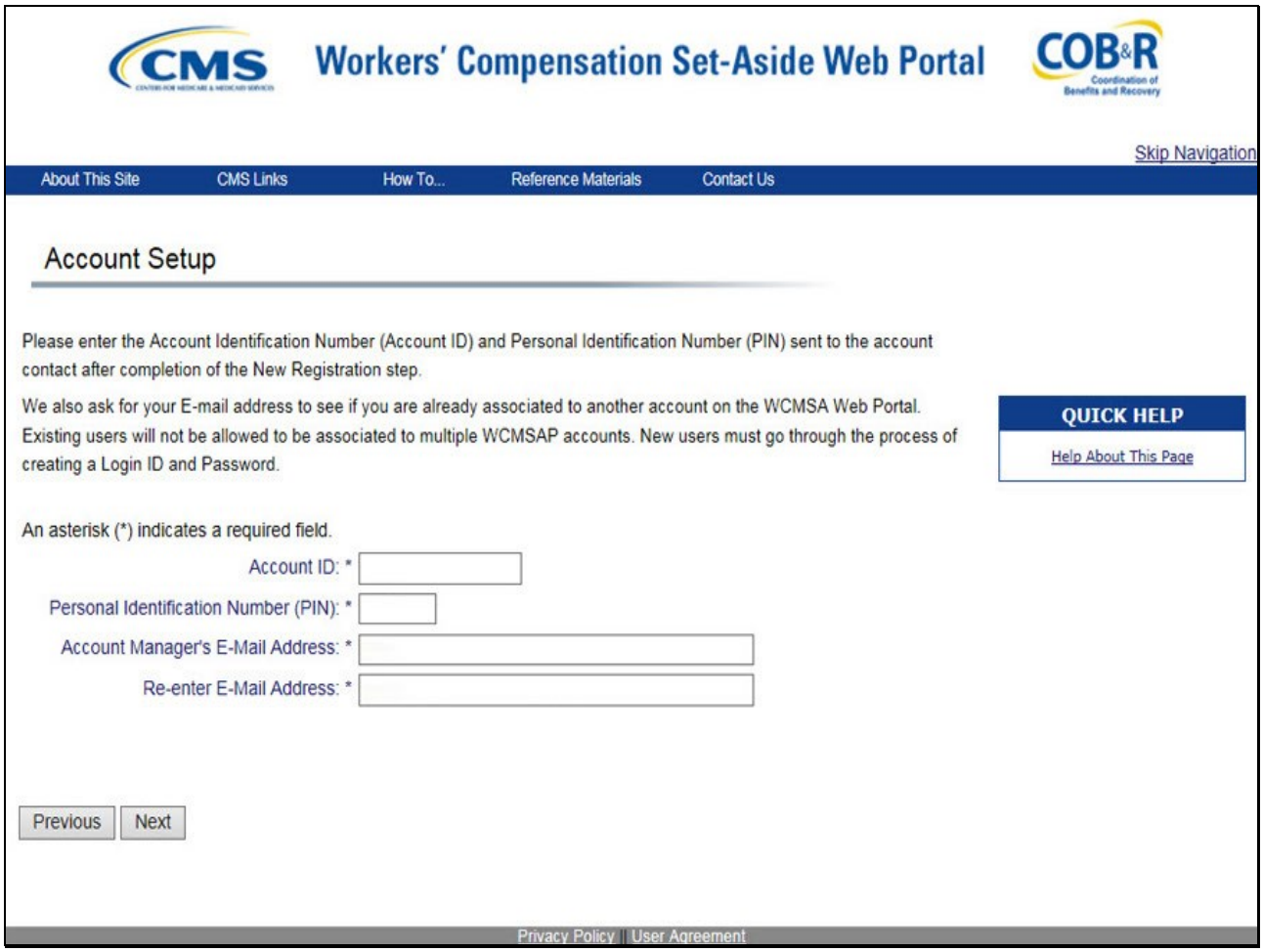

Slide notes

When you have completed the Account Setup page, click Next to continue. 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.

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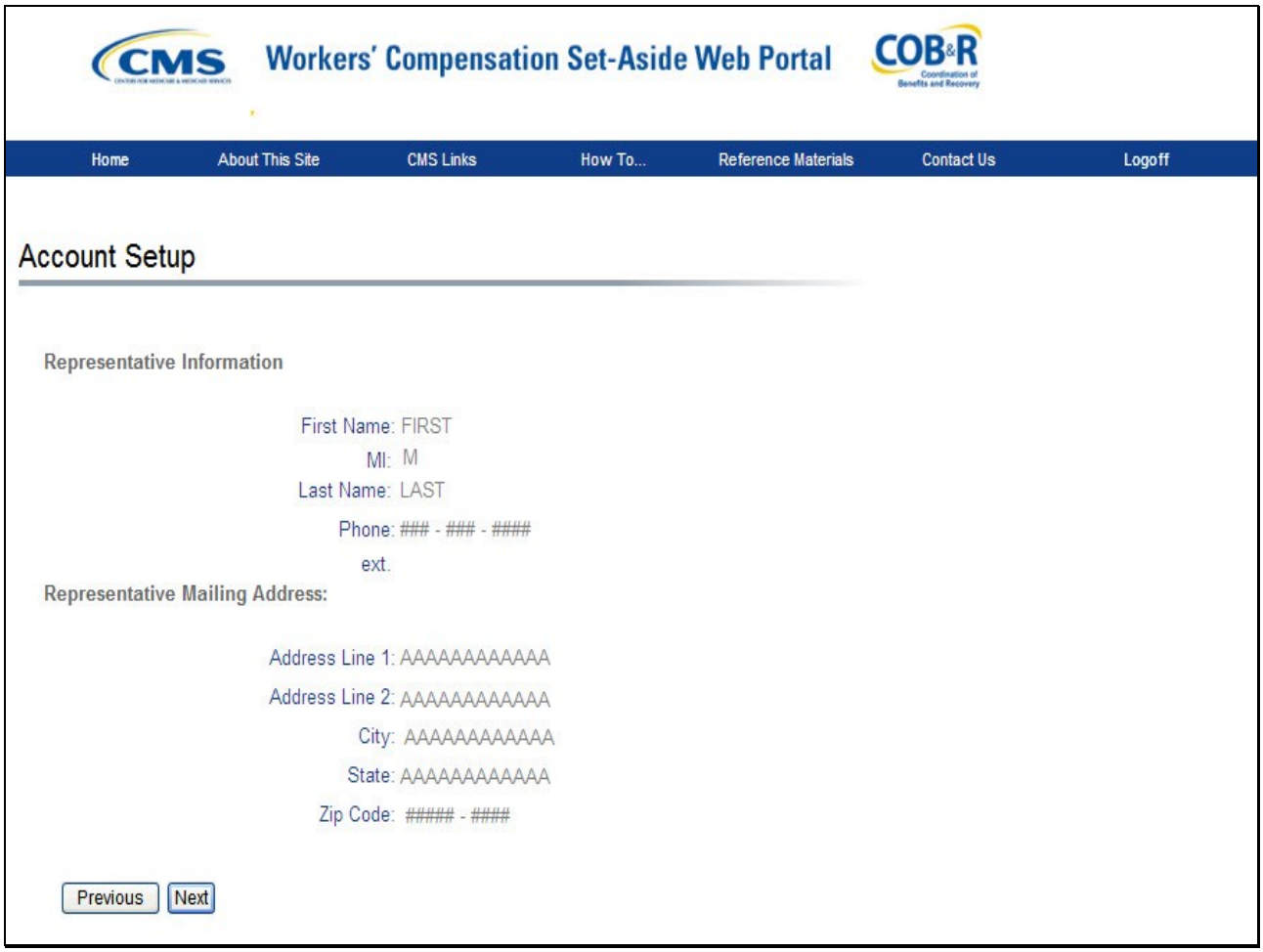

Slide notes

After all information has been verified by the system, the Account Setup – Representative Information page displays.

This page displays information entered during the initial registration process.

Review the listed information. If any of the information is incorrect, contact an Electronic Data Interchange (EDI) Representative to have it corrected.

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

Skip Navigati

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

Account Manager Personal Information

QUICK HELP

Help About This Page

Please click this button if information is identical to that provided during initial registration.

Same as Submitter

An asterisk (*) indicates a required field.

First Name: * MI: Last Name: *

E-mail Address: *

Phone: * - - - ext.

Mailing Address:

Address Line 1: *

Address Line 2:

City: *

State: *

Zip Code: * -

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

Slide notes

The Account Manager Personal Information page will then display.

Enter the required personal information.

The information you enter here is required for subsequent communications.

If the Account Manager information is the same information that was entered for the Representative during New Registration, click the Same as Submitter button to populate the fields.

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

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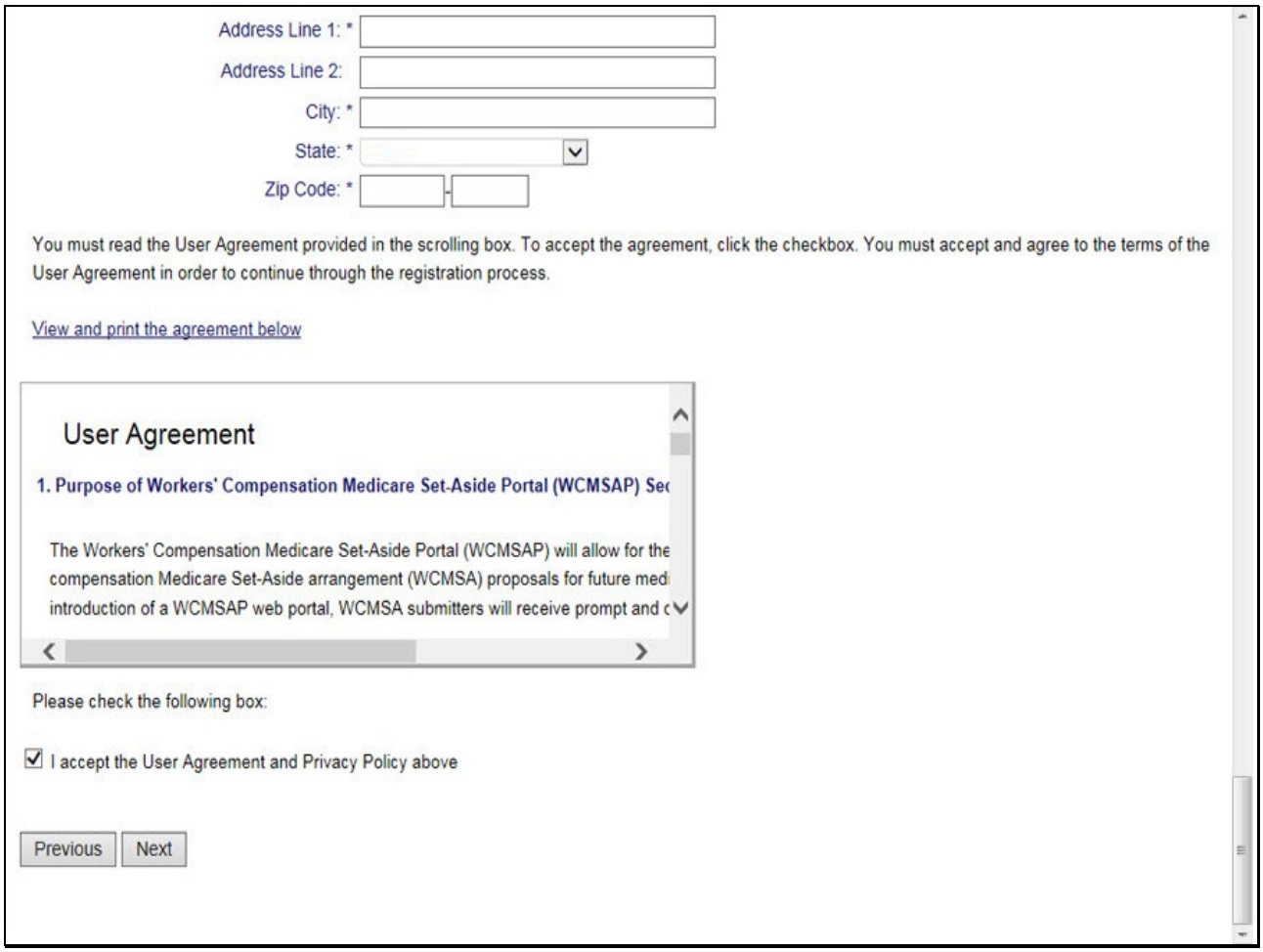

Slide notes

When the Account Manager information has been entered, scroll down to view the User Agreement.

You must read and accept the terms of this agreement. Click the “I accept” check box and then click Next to continue with the Account Setup.

You may print a copy of this for your records.

The system will validate that all required fields on this page have been entered.

If the Account Manager has entered incomplete or invalid information (i.e., the entered information does not pass the WCMSAP edits), the system will display an error message.

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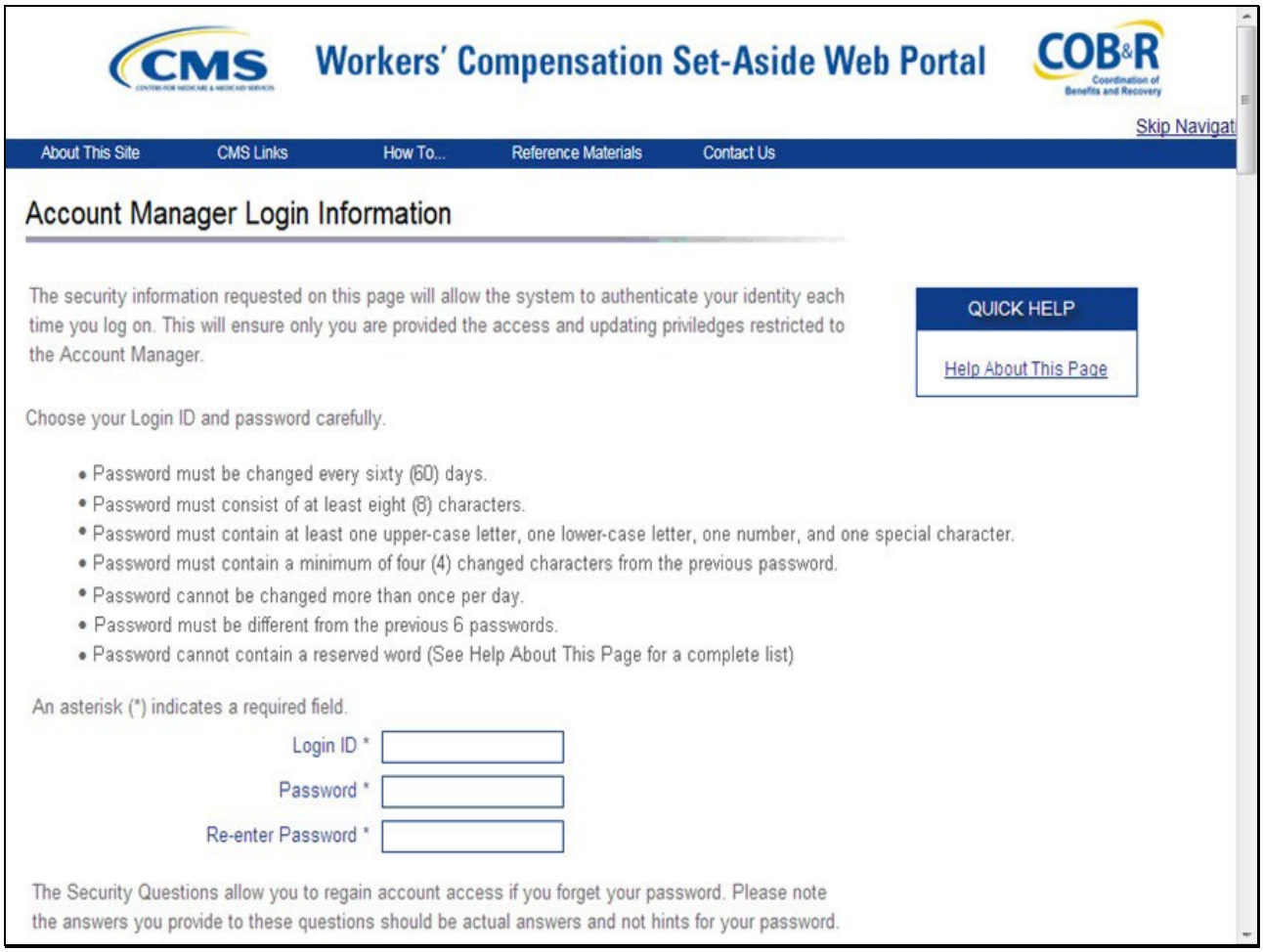

Slide notes

If you are a new user, the Account Manager Login Information page will display, requesting you to set up a Login ID and Password using the following guidelines.

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.

Login IDs must be 7 characters and must be in the format of AA999AA: first two alphabetic, next three numeric, last two alphabetic. Login ID and Password cannot be the same and the password must adhere to the following standards:

Must be changed every sixty days, must consist of at least eight characters, must contain at least one uppercase letter, one lowercase letter, one number and one special character.

The password must also contain a minimum of four changed characters from the previous password. It cannot be changed more than once per day, must be different from the previous six passwords and not contain any words from the reserved words list.

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

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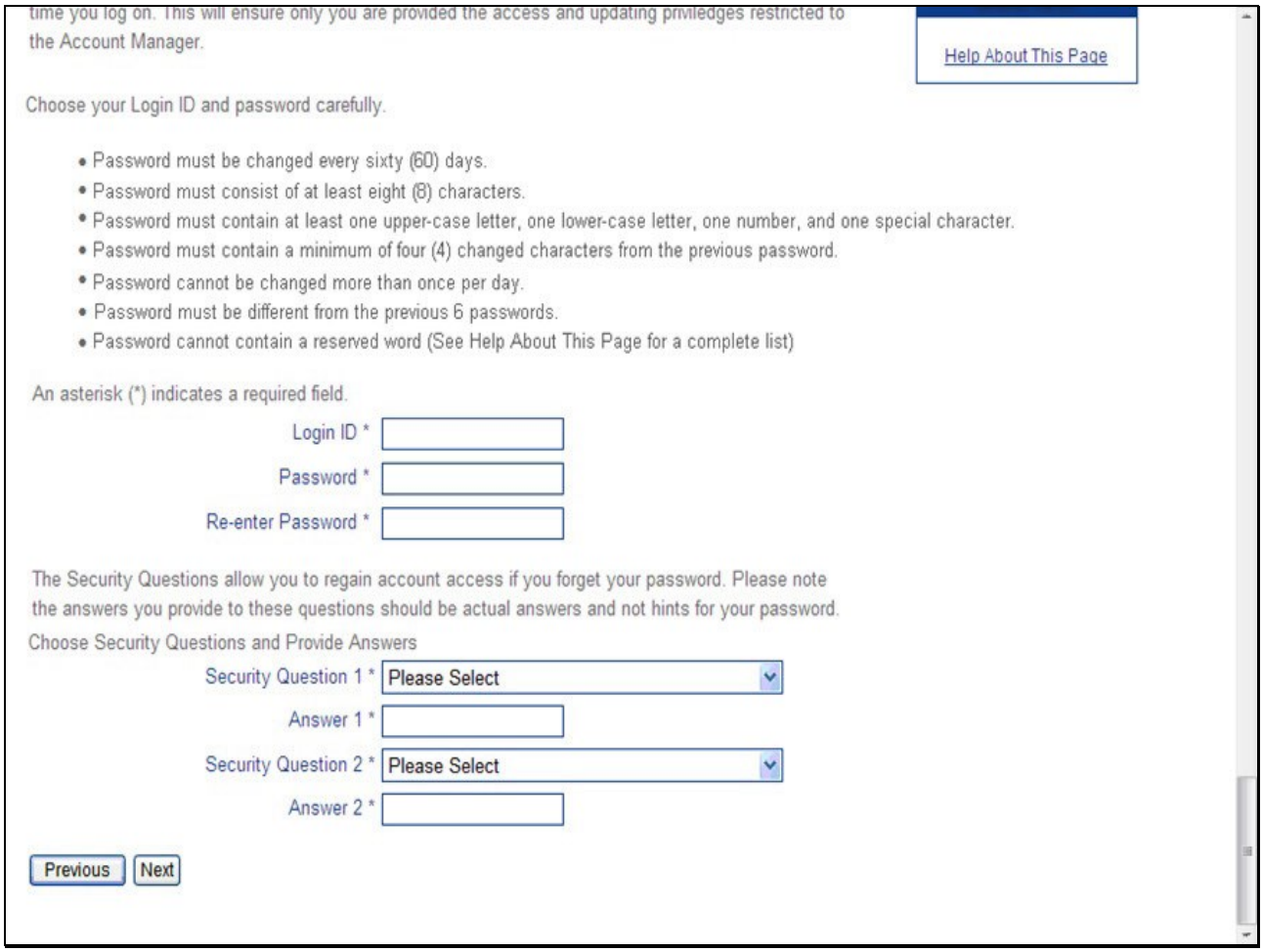


Slide notes

The security information requested on this page will allow the system to authenticate your identity each time you log in to the WCMSAP.

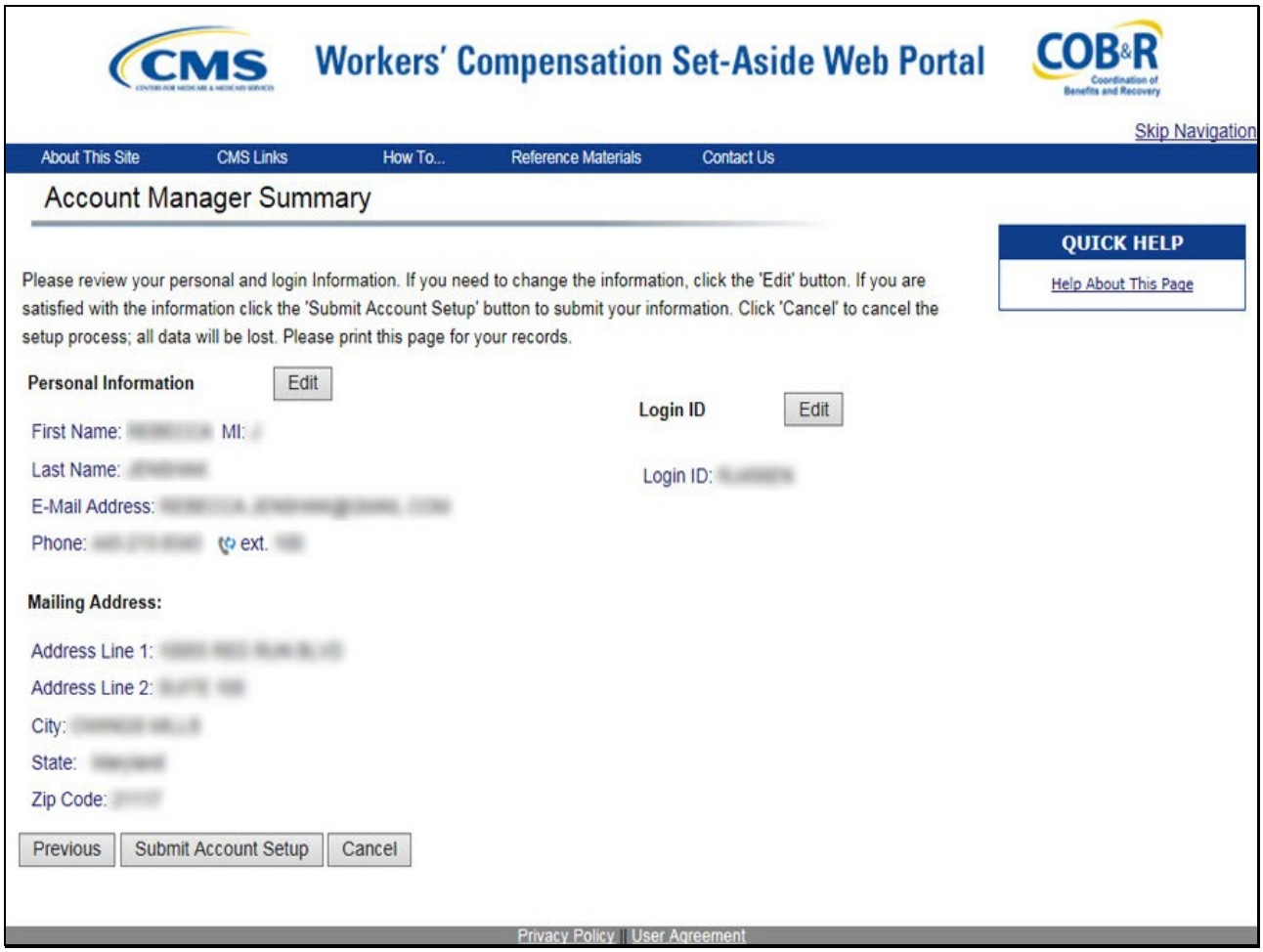
Create your Login ID, and enter and re-enter a Password. Select 2 Security Questions and Answers and click Next.

You will use your Login ID and Password to enter the WCMSAP site and manage the account, 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.

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

Slide 17 - of 23



Slide notes

The Account Manager Summary page will display.

This page lists all of the information you entered during Account Setup.

All information should be reviewed and verified before continuing.

To make any corrections, or to change previously entered information, click the Edit button next to the section that needs to be modified.

This will return you to the applicable page to make modifications.

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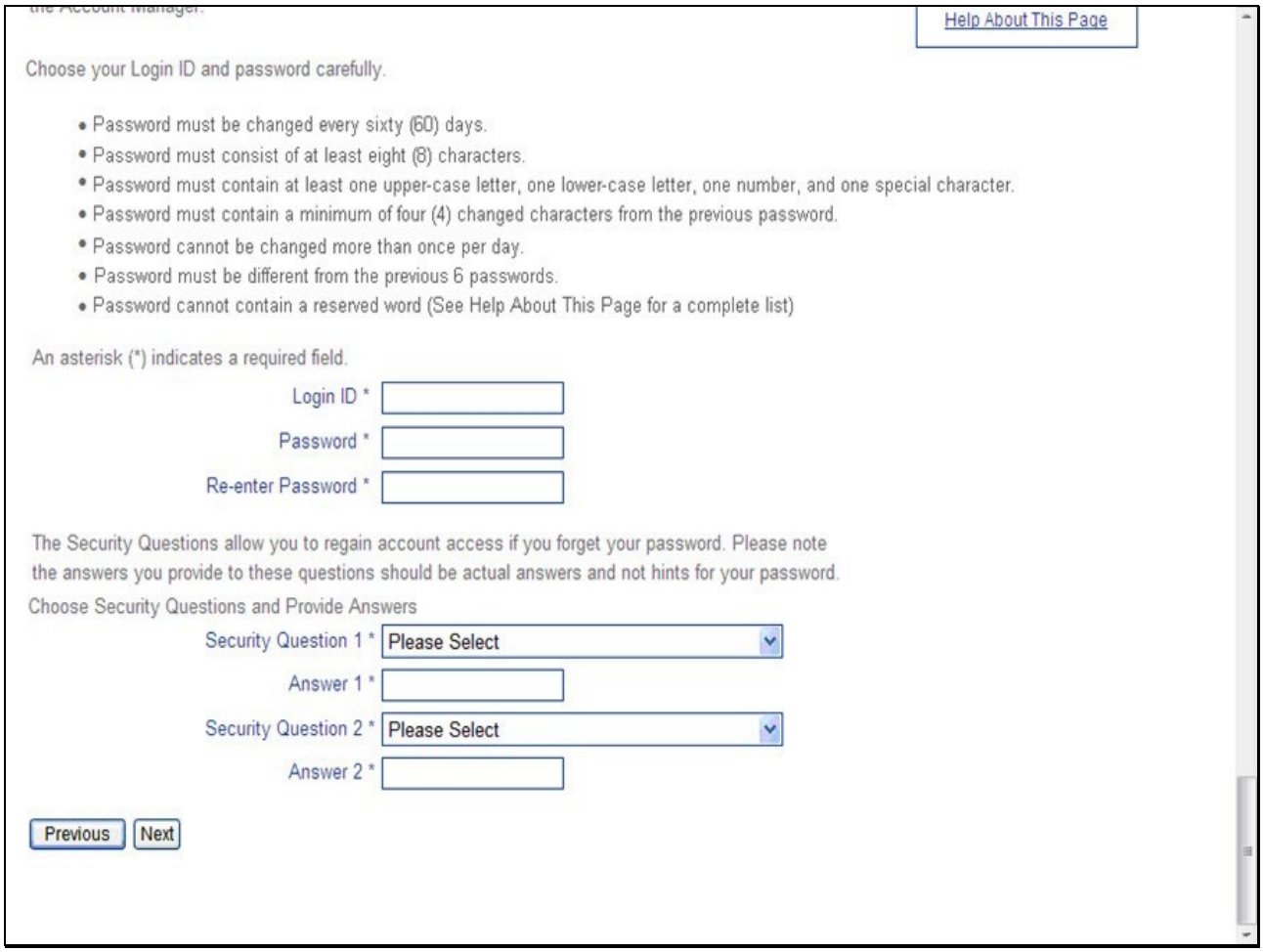

Slide notes

Change any of the information as needed.

Once you have finished editing the information, click Next to return to the Account Manager Summary page.

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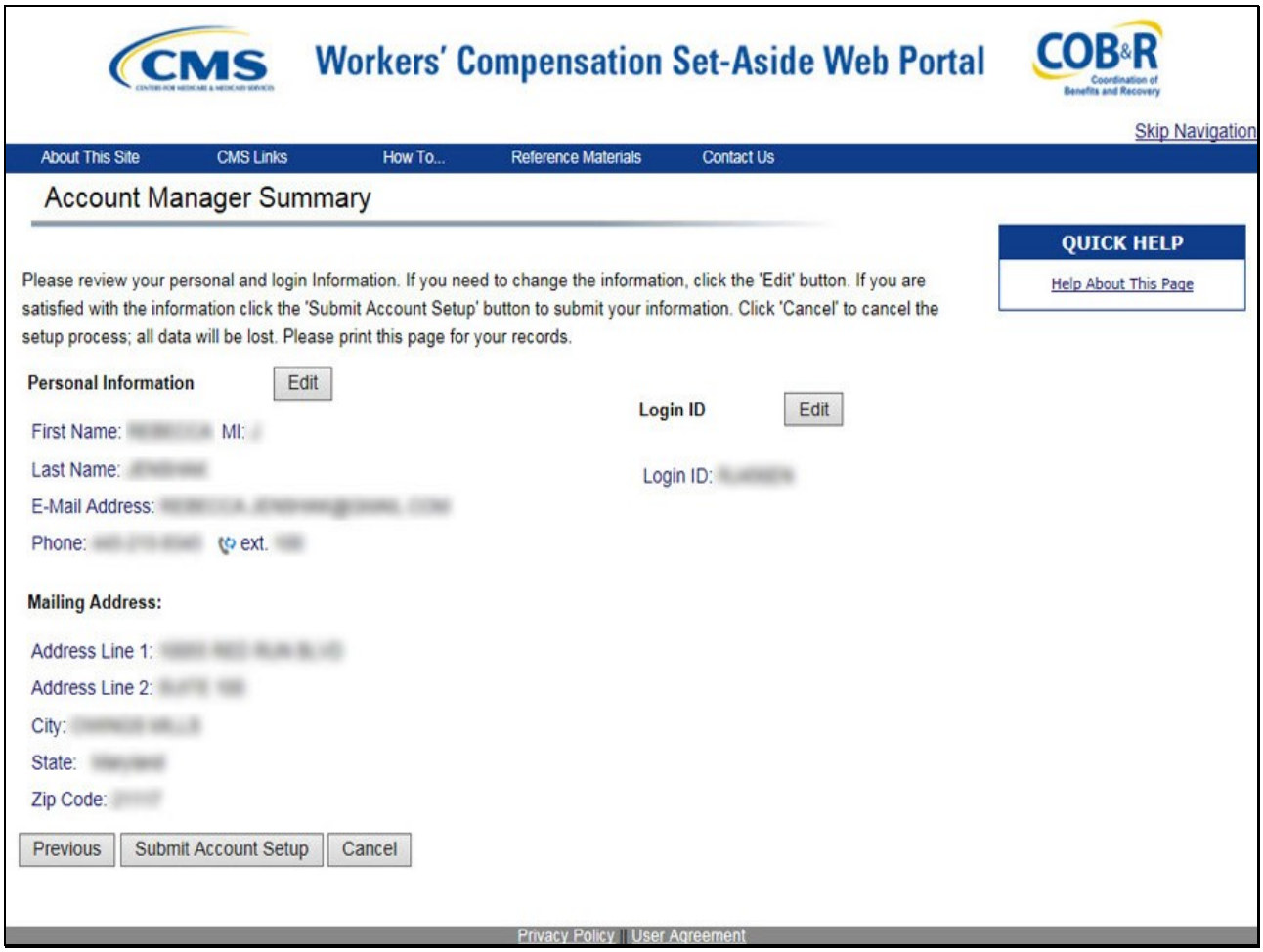

Slide notes

If you need to return to the Account Manager Login Information page, click Previous.

If you need to cancel the account setup, click Cancel.

To submit your information, click Submit Account Setup.

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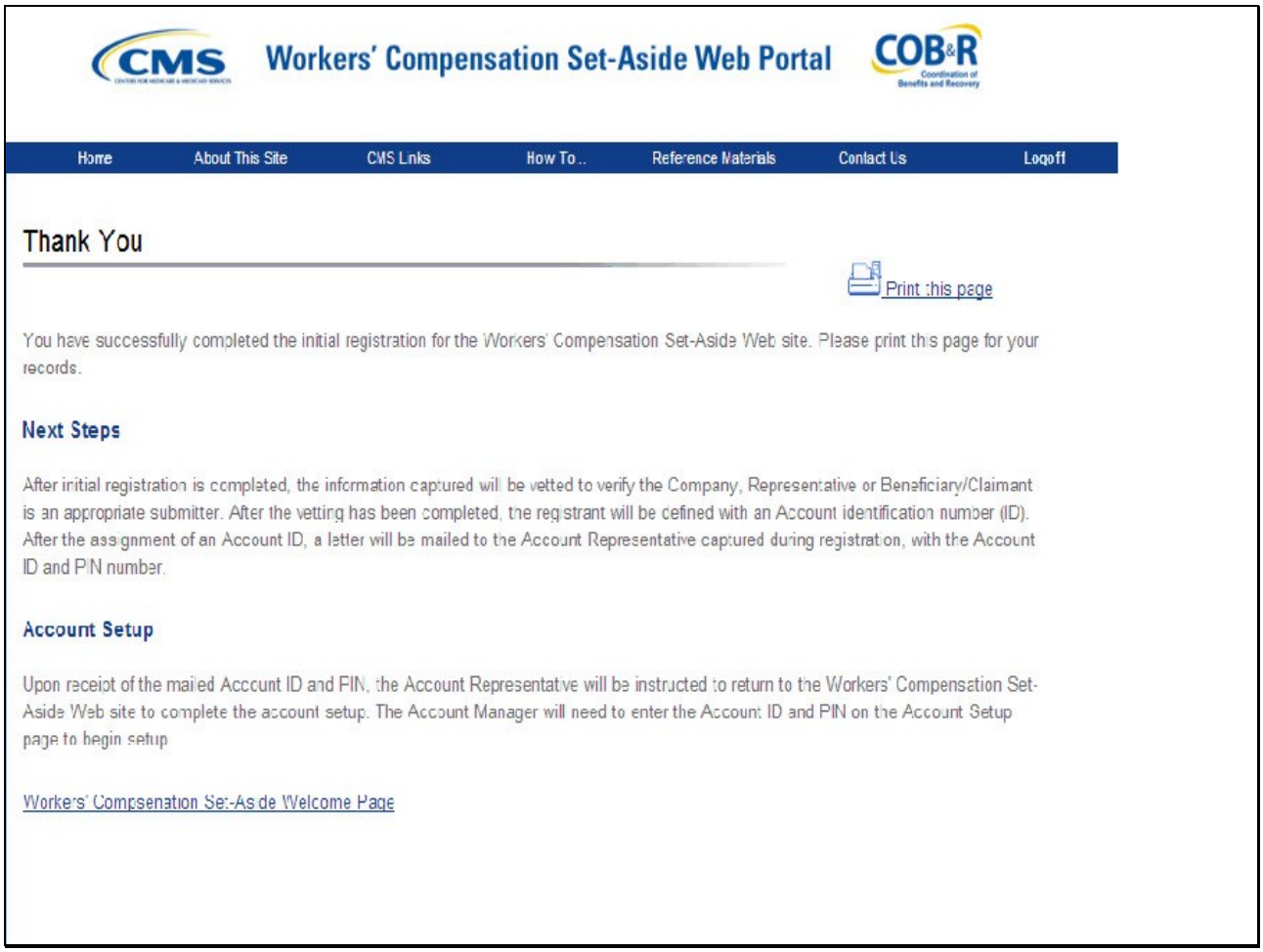

Slide notes

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

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

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Next Steps

- Account Manager controls administration of WCMSAP account
  - Once account setup is complete, e-mail notification will be sent to you
  - E-mail will also include Profile Report
    - Contact EDI Department if Profile Report not received within 10 business days
    - Must review, sign, and return Profile Report to BCRC within 60 business days
    - You cannot submit, view, or create cases until the signed Profile Report is received by the BCRC
    - If sending by e-mail, use "WCMSAP Profile Report" in subject line
    - If signed Profile Report is not received within timeframe, account will be automatically deleted on the 60th business day
    - If account is deleted, you must start the registration process from the beginning
    - Once Profile Report is received by BCRC, you may login to use your account

Slide notes

At this point, you will have successfully setup the account and registered yourself as the Account Manager.

As the Account Manager, you control the administration of the WCMSAP account.

Upon completion of all information for the account setup, an e-mail notification will be sent to you.

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.

Contact the EDI Department if you do not receive a Profile Report after 10 business days.

The profile report 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.

You will have 60 business days to review, sign, and return the Profile Report to the BCRC.

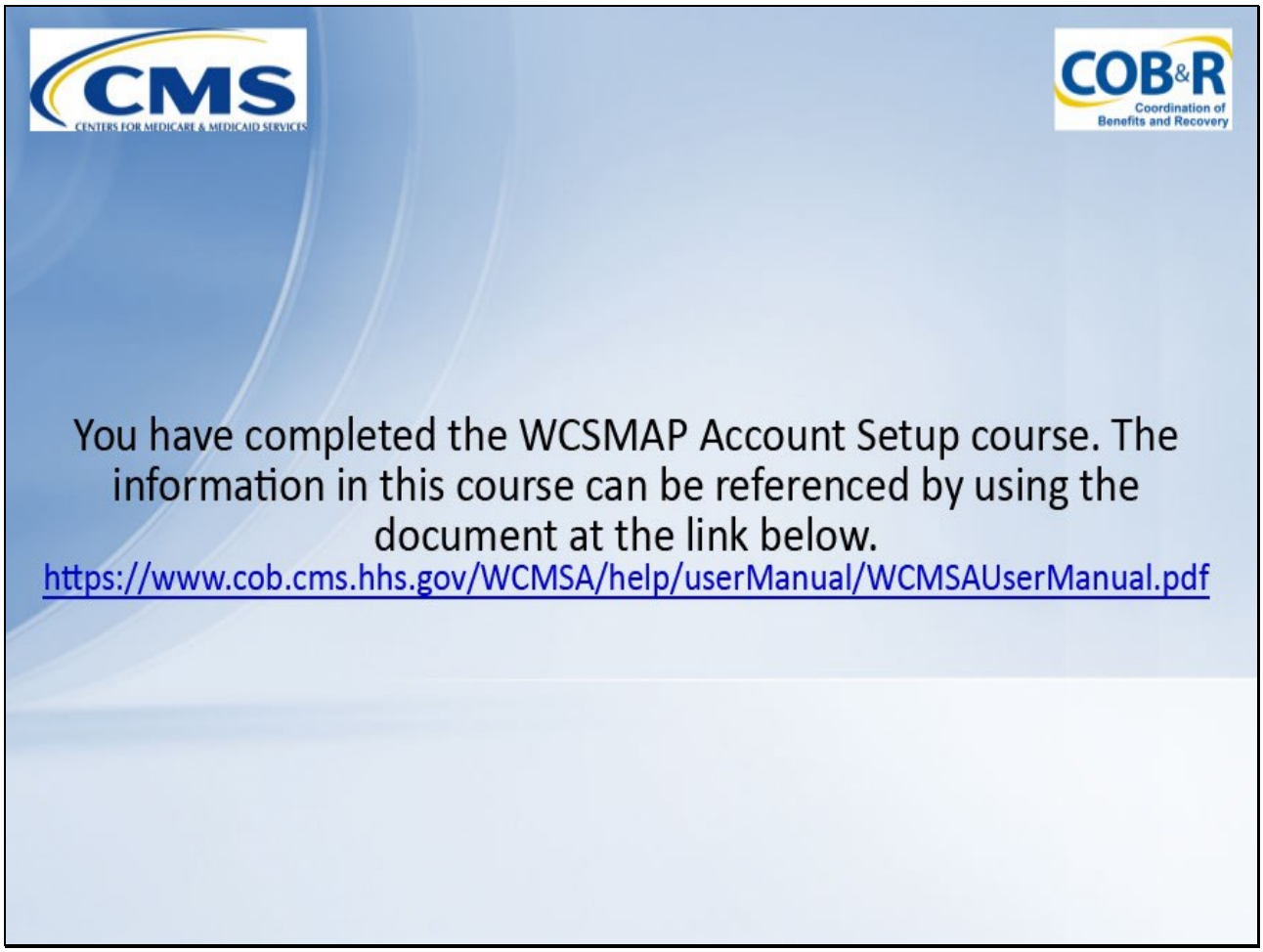
When returning the signed Profile Report via email, use "WCMSAP Profile Report" in the subject line.

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.

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.

Slide 22 - of 23



Slide notes

You have completed the WCSMAP 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

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Slide notes

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