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The slide features a light blue background with abstract white and yellow curved lines. 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 title is centered in a large, black, sans-serif font. At the bottom left, there is a version number and a note about the presentation's modifiability, with a URL provided.

**CMS**  
CENTERS FOR MEDICARE & MEDICAID SERVICES

**COB&R**  
Coordination of  
Benefits and Recovery

# Workers' Compensation Medicare Set-Aside Portal (WCMSAP) Account Setup Self Submitter

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

**Slide notes**

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

This module is intended for self submitter WCMSAP account users. A self submitter is a WCMSA user who will submit a case for themselves.

A self submitter must be a Medicare beneficiary or have a reasonable expectation of becoming a Medicare beneficiary within 30 months.

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.

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

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## 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 after the Account Setup has been submitted.

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## Getting Started

- Account Manager completes Account Setup
  - Self submitter is Account Manager
  
- Begin Account Setup
  - After New Registration
  - After you have received Personal Identification Number (PIN) and Account ID from the BCRC

### Slide notes

The WCMSAP Account Setup must be completed by the Account Manager. If you are a self submitter, you are the Account Manager.

Account Setup may begin after you have completed the New Registration step and after you have received your Personal Identification Number (PIN) and Account ID/Submitter ID from the Benefits Coordination & Recovery Center (BCRC). The PIN and Account ID/Submitter ID are needed to complete the Account Setup.

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The screenshot shows the CMS.gov website homepage. At the top, there is a navigation bar with links for Home, About CMS, Newsroom Center, FAQs, Archive, Share, Help, and Print. Below this is the CMS.gov logo and the text 'Centers for Medicare & Medicaid Services'. A search bar is located to the right of the logo. Below the logo is a row of seven yellow buttons: Medicare, Medicaid/CHIP, Medicare Medicaid Coordination, Private Insurance, Innovation Center, Regulations & Guidance, Research, Statistics, Data & Systems, and Outreach & Education. The main banner features a photograph of three people (a woman in a pink shirt, a woman in a white shirt, and a man in a red shirt) and three columns of text: 'Covering more Americans', 'Making Americans healthier by preventing illness', and 'Coordinating better care & lowering costs'. Below the banner is a 'CMS news' section with two news items: 'HHS Secretary announces \$840 million initiative to improve patient care and lower costs' and 'Medicaid and CHIP Enrollment Grows by 8.7 Million Additional Americans'. To the right of the news section is a large headline 'CMS covers 100 million people...' followed by a paragraph: '...through Medicare, Medicaid, the Children's Health Insurance Program, and the Health Insurance Marketplace. But coverage isn't our only goal. To achieve a high quality health care system, we also aim for better care at lower costs and improved health.'

Slide notes

In order to perform the WCMSAP Account Setup, you must go to the WCMSAP Web site found at the following URL: <https://www.cob.cms.hhs.gov/WCMSA>.

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The screenshot shows the CMS.gov website. The browser address bar is zoomed in, showing the URL <https://www.cob.cms.hhs.gov/WCMSA>. The website header includes navigation links: Home, About CMS, Newsroom Center, FAQs, Archive, Share, Help, and Print. Below the header is the CMS.gov logo and the text "Centers for Medicare & Medicaid Services". A search bar is present with the text "Learn about your healthcare options". The main content area features a large image of a healthcare professional interacting with an elderly couple. Below the image are three columns of text: "Covering more Americans", "Making Americans healthier by preventing illness", and "Coordinating better care & lowering costs". To the left, there is a "CMS news" section with two items: "HHS Secretary announces \$840 million initiative to improve patient care and lower costs" and "Medicaid and CHIP Enrollment Grows by 8.7 Million Additional Americans". The main headline reads "CMS covers 100 million people..." followed by a sub-headline: "...through Medicare, Medicaid, the Children's Health Insurance Program, and the Health Insurance Marketplace. But coverage isn't our only goal. To achieve a high quality health care system, we also aim for better care at lower costs and improved health."

Slide notes

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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.

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.

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

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

## 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>

**WCMSAP Message**

Reminder that the use of ICD-10 codes has been implemented. All WCMSA proposals, with a date of incident (DOI) on or after October 1, 2015, should be submitted using the new ICD-10 codes. The WCMSA related User Guides and training materials have been updated to include ICD-10 information.

**GETTING STARTED**

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

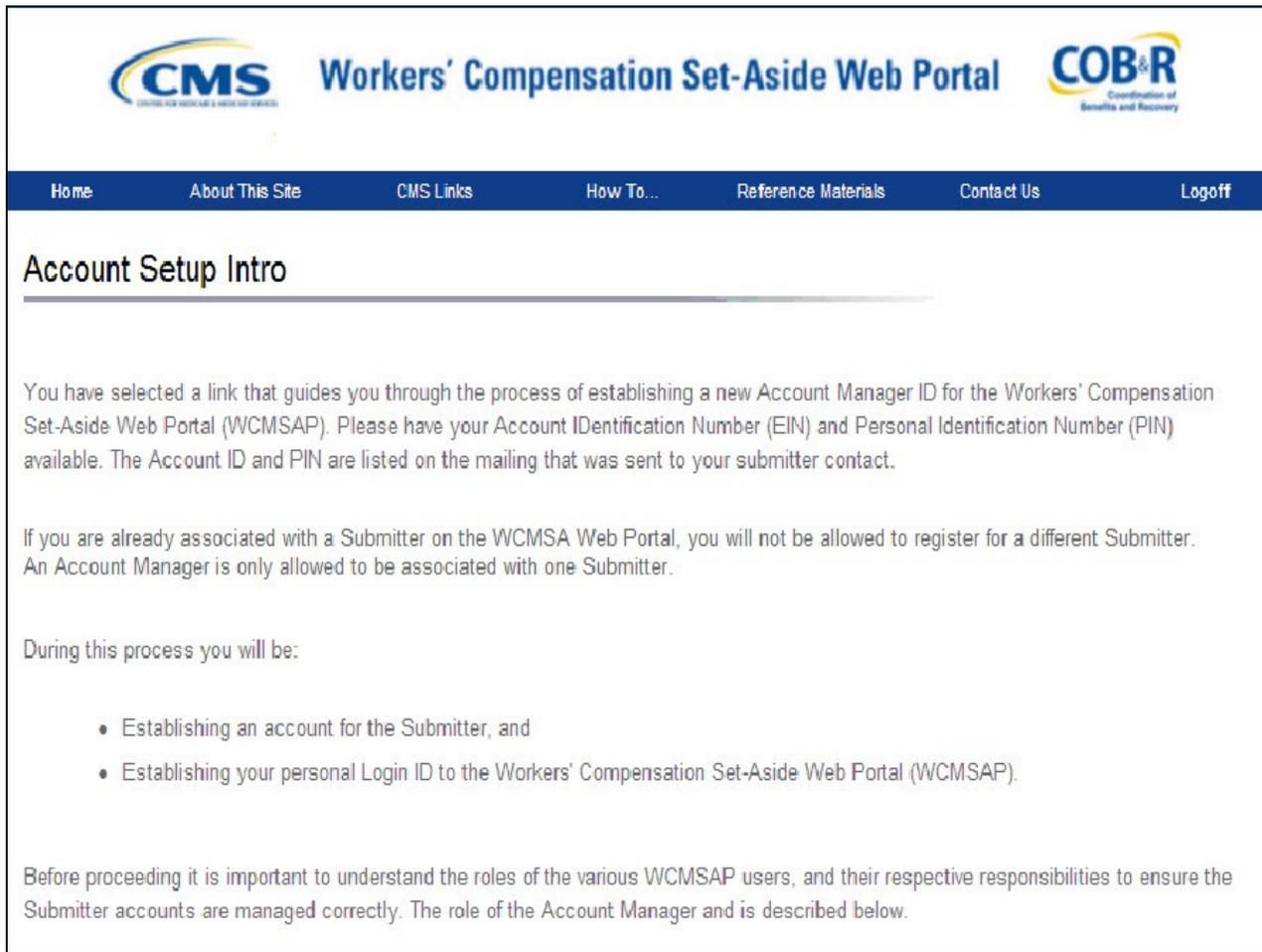
STEP 1                      STEP 2  
New Registration →                      Account Setup →  
 (Account ID and PIN required)

[Privacy Policy](#)
[User Agreement](#)
[Adobe Acrobat](#)

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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The screenshot shows the top of a web portal. On the left is the CMS logo (Center for Medicare & Medicaid Services). In the center is the text "Workers' Compensation Set-Aside Web Portal". On the right is the COB&R logo (Coordination of Benefits and Recovery). Below the logos is a dark blue navigation bar with white text links: Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Logoff. The main content area has a heading "Account Setup Intro" followed by a horizontal line. The text below explains the account setup process, mentioning the need for Account Identification Number (EIN) and Personal Identification Number (PIN). It also states that users already associated with a Submitter cannot register for a different one. A list of tasks during the process is provided: establishing an account for the Submitter and establishing a personal Login ID. Finally, it notes the importance of understanding user roles and responsibilities.

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

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

## 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 Set-Aside Web Portal (WCMSAP). Please have your Account Identification Number (EIN) and Personal Identification Number (PIN) available. The Account ID and PIN are listed on the mailing that was sent to your submitter contact.

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

During this process you will be:

- Establishing an account for the Submitter, and
- Establishing your personal Login ID to the Workers' Compensation 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 Submitter accounts are managed correctly. The role of the Account Manager and is described below.

**Slide notes**

The Account Setup Introduction page will display. This page describes the Account Setup process and your role as the Account Manager.

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

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The screenshot shows the 'Account Setup' 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'. The main heading is 'Account Setup'. Below the heading, there is a paragraph explaining the need for an Account ID and PIN, and another paragraph asking for an email address. A 'QUICK HELP' button is visible on the right. The form fields are: 'Account ID: \*' with the value '1234567890', 'Personal Identification Number (PIN): \*' with the value '0000', 'Account Manager's E-Mail Address: \*' with the value 'email@email.com', and 'Re-enter E-Mail Address: \*' with the value 'email@email.com'. At the bottom left, there are 'Previous' and 'Next' buttons. At the bottom center, there are links for 'Privacy Policy' and 'User Agreement'.

## Slide notes

The Account Setup page will display. This page requires you to enter the Account ID and PIN that were mailed to you. 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.

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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**CMS** Workers' Compensation Set-Aside Web Portal **COB&R**  
Center for Medicare & Medicaid Services Coordination of Benefits and Recovery

[Skip Navigation](#)

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

## Account Setup

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

Self/Beneficiary Information:

First Name: FIRST  
MI: M Last Name: LAST  
Phone: ### - ### - ####

Mailing Address:

Address Line 1: AAAAAAAAAAAAA  
Address Line 2: AAAAAAAAAAAAA  
City: AAAAAAAAAAAAA  
State: AAAAAAAAAAAAA  
Zip Code: ##### - ####

[Previous](#) [Next](#)

[Privacy Policy](#) | [User Agreement](#)

Slide notes

After all information has been verified by the system, the Account Setup – Self/Beneficiary Information page will display. Information on this page will be pre-filled using information that you 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. Click Next to continue.

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

[Skip Navigation](#)

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

### Account Manager Personal Information

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

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

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 display. All fields will automatically be pre-filled for you with the contact information you entered earlier.

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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 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

You must read and accept the terms of the User 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.

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The screenshot shows the 'Account Manager Login Information' page. At the top, there are logos for CMS (Colorado Motor Vehicle & Accident Services), Workers' Compensation Set-Aside Web Portal, and COB&R (Colorado Office 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 Login Information'. Below this, a text block explains that the security information requested will allow the system to authenticate the user's identity. A 'QUICK HELP' button with the text 'Help About This Page' is located on the right. The instructions state to choose a Login ID and password carefully, followed by a list of password requirements:
 

- 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 5 passwords.
- Password cannot contain a reserved word (See Help About This Page for a complete list).

 An asterisk (\*) indicates a required field. The form includes three input fields: 'Login ID \*', 'Password \*', and 'Re-enter Password \*'. Below these, instructions for Security Questions are provided: '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.' The form asks to 'Choose Security Questions and Provide Answers' with two sets of dropdown menus for 'Security Question' and 'Answer'. At the bottom left, there are 'Previous' and 'Next' buttons.

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.

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## Account Manager Login Information

### Login IDs:

- Must be 7 Characters
- Must be in the format of AA999AA
- Login ID and Password cannot be the same

### Passwords:

- Must be changed every 60 days
- Must be 8 characters in length
- Must contain at least one upper case and one lower case letter, one number and one special character
- Cannot be changed more than once per day
- Cannot contain 4 consecutive characters from the previous password
- Must be different from last 6 passwords
- Cannot contain a reserve word

### Slide notes

Login IDs must be 7 characters, Login IDs must be in the format of AA999AA (first two alphabetic, next three numeric, last two alphabetic), 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 cannot contain a reserved word. The updated Reserved Words List can be referenced in the latest WCMSAP User Guide.

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## Workers' Compensation Set-Aside Web Portal



[Skip Navigation](#)

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

### 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 5 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](#)

Previous
Next

## 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.

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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'. The main heading is 'Account Manager Summary'. Below this, a paragraph of instructions explains that users can edit their personal and login information or submit their setup. A 'QUICK HELP' box with a 'Help About This Page' link is on the right. The 'Personal Information' section includes fields for First Name (John), Last Name (Doe), E-Mail Address (email@email.com), and Phone (555 555-5555 ext.), each with an 'Edit' button. The 'Mailing Address' section includes fields for Address Line 1 (200 Test Street), Address Line 2, City (Towson), State (Maryland), and Zip Code (21204-3276). At the bottom, there are buttons for 'Previous', 'Submit Account Setup', and 'Cancel'. A footer contains links for 'Privacy Policy' and 'User Agreement'.

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.

You may print this page for your records. 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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- Login IDs must be 7 characters
- Login IDs must be unique within the system
- Login IDs must be in the format of AA999AA (first two alphabetic, next three numeric, last two alphabetic)
- Password cannot contain your Login ID
- Password must be 8 characters in length
- Password must be at least one upper case letter, one lower case letter, and one number
- Password must be different from the last 6 passwords
- The first character of your password may not be numeric (0-9)
- Password cannot be changed more than once per day
- Password cannot contain reserved words listed on the help page

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

Change any of the information as needed.

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- Login IDs must be 7 characters
- Login IDs must be unique within the system
- Login IDs must be in the format of AA999AA (first two alphabetic, next three numeric, last two alphabetic)
- Password cannot contain your Login ID
- Password must be 8 characters in length
- Password must be at least one upper case letter, one lower case letter, and one number
- Password must be different from the last 6 passwords
- The first character of your password may not be numeric (0-9)
- Password cannot be changed more than once per day
- Password cannot contain reserved words listed on the help page

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

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- Login IDs must be 7 characters
- Login IDs must be unique within the system
- Login IDs must be in the format of AA999AA  
(first two alphabetic, next three numeric, last two alphabetic)
- Password cannot contain your Login ID
- Password must be 8 characters in length
- Password must be at least one upper case letter, one lower case letter, and one number
- Password must be different from the last 6 passwords
- The first character of your password may not be numeric (0-9)
- Password cannot be changed more than once per day
- Password cannot contain reserved words listed on the help page

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

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- Login IDs must be 7 characters
- Login IDs must be unique within the system
- Login IDs must be in the format of AA999AA (first two alphabetic, next three numeric, last two alphabetic)
- Password cannot contain your Login ID
- Password must be 8 characters in length
- Password must be at least one upper case letter, one lower case letter, and one number
- Password must be different from the last 6 passwords
- The first character of your password may not be numeric (0-9)
- Password cannot be changed more than once per day
- Password cannot contain reserved words listed on the help page

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

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

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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.' Below this text are two sections: 'Personal Information' and 'Login ID', each with an 'Edit' button. The Personal Information section lists: First Name: John, Last Name: Doe, E-Mail Address: email@email.com, and Phone: 555 555-5555 ext. The Login ID section lists: Login ID: AA123bb. A 'Mailing Address' section follows, listing: Address Line 1: 200 Test Street, Address Line 2: (blank), City: Towson, State: Maryland, and Zip Code: 21204-3276. At the bottom of the form are three buttons: 'Previous', 'Submit Account Setup', and 'Cancel'. A 'QUICK HELP' box on the right contains a link for 'Help About This Page'. The footer contains links for 'Privacy Policy' and 'User Agreement'.

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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The screenshot shows the 'Thank You' page 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). Below the logos is a navigation menu with links: Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Logoff. The main content area features a large 'Thank You' heading, a horizontal line, and a 'Print this page' button with a printer icon. Below this, a paragraph states: 'You have successfully completed the initial registration for the Workers' Compensation Set-Aside Web site. Please print this page for your records.' This is followed by a 'Next Steps' section with a paragraph explaining the vetting process and the assignment of an Account ID and PIN. Below that is an 'Account Setup' section with a paragraph instructing the user to return to the Account Setup page upon receiving their Account ID and PIN. At the bottom, there is a link: [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. Click the Workers' Compensation Medicare Set-Aside Welcome Page link to return to the Welcome page.

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## Next Steps

- Profile Report will be sent via email from the BCRC
  - Review for accuracy, sign and return to the BCRC
  - May take up to 10 business day to receive report
  - Contact EDI Department if Profile Report is not received with 10 business days
  - Profile Report must be reviewed, signed and returned to BCRC within 60 business days
    - Use “WCMSAP Profile Report” in the email subject line
    - You cannot submit, view or create cases until the signed Profile Report is received by the BCRC
    - Account will be automatically deleted on 60th business day and the registration process must be restarted

### 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.

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. 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 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. 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 and submit your case.

Note: If a signed Profile Report is not received within 60 business days, 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.

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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:

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The slide features a light blue background with a white horizontal band at the bottom. 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 central text reads: "If you have any questions or feedback on this material, please go to the following URL: <https://www.surveymonkey.com/s/WCMSAPTraining>."

Slide notes

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