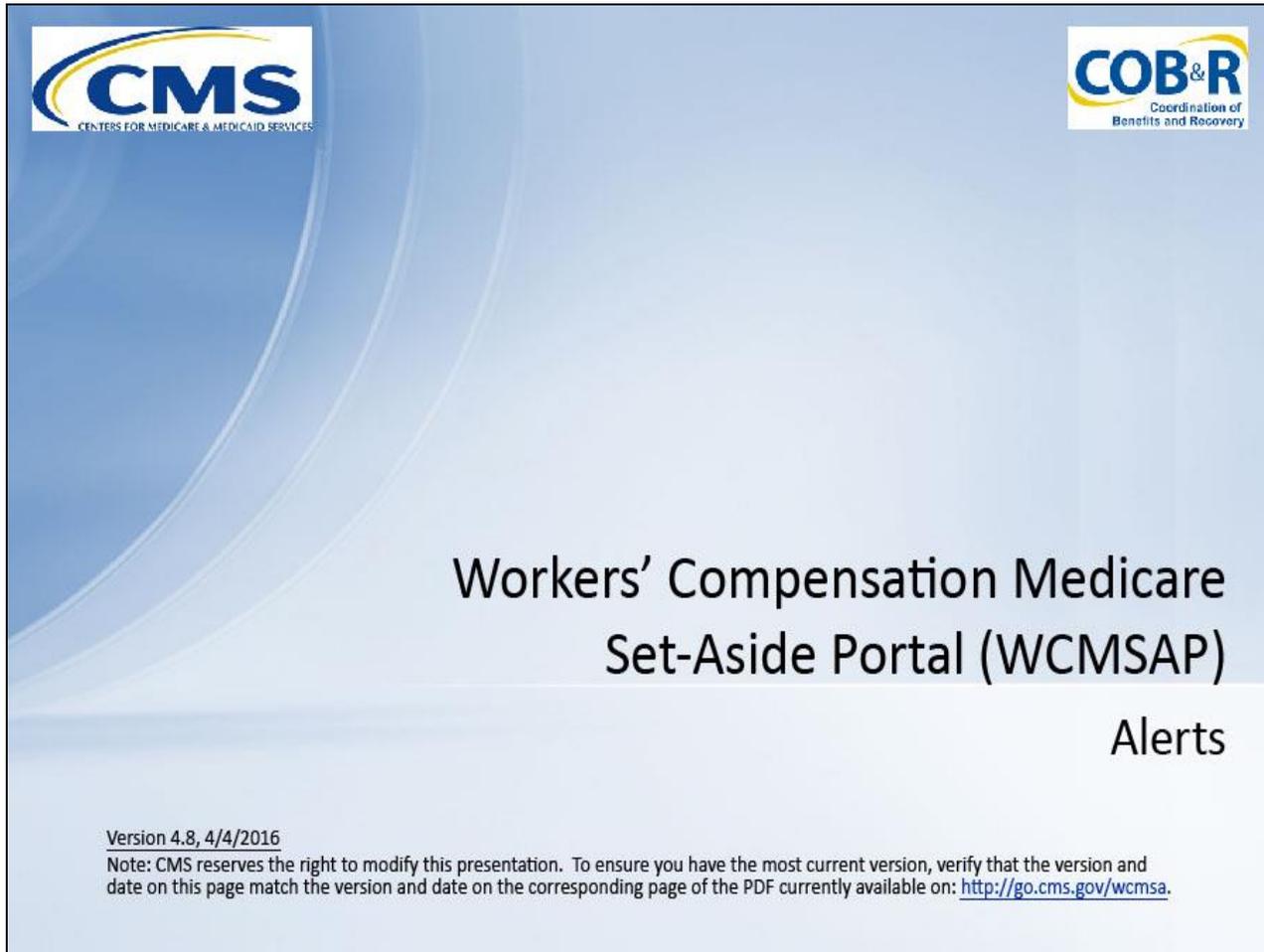


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CMS
CENTERS FOR MEDICARE & MEDICAID SERVICES

COB&R
Coordination of
Benefits and Recovery

Workers' Compensation Medicare Set-Aside Portal (WCMSAP)

Alerts

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) Alerts course.

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

Additionally, you can view the narration by clicking the Closed Caption [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: <https://go.cms.gov/wcmsa>.

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Course Overview

- Alerts Explained
- Accessing Alerts
- Responding to Alerts



Slide notes

This course describes what an alert is, explains the different ways to access an alert and clarifies what to do when an alert is received.

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WCMSAP E-mail Notifications

WCRC reviews submitted case for completeness and accuracy

If errors are found WCRC sends e-mail alert to e-mail address provided during account setup

Slide notes

Workers' Compensation Medicare Set-Aside (WCMSA) cases that have been submitted are reviewed by the Workers' Compensation Recovery Center (WCRC) for completeness and accuracy.

If errors are found, the WCRC will send an alert e-mail to the e-mail address provided during account setup.

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From: cobva@ghimedicare.com
Sent: October 01, 2010 2:42 PM
To: All E-mail addresses associated with case
Subject: Alert ## Has Been Posted

Account Number: #####
Case Control Number: #####
Alert Type: See values below

A/An [Alert Type] alert has been posted on the Workers' Compensation Medicare Set-Aside Portal. This alert contains information relating to recent activity on case ##### for account number #####.

Note: Alert Types are: Below Threshold, Development, Deny, Zero Set Aside, Under Threshold, Approval, Closeout, Commingled Documentation, and Deceased Beneficiary.

Please log into the website <http://www.cob.cms.hhs.gov/WCMSA> to review the alert details.

PLEASE DO NOT REPLY TO THIS EMAIL

Confidentiality Note:

This electronic message transmission is intended only for the person or entity to which it is addressed and may contain information that is privileged, confidential, or otherwise protected from disclosure. If you have received this transmission but are not the intended recipient, you are hereby notified that any disclosure, copying, distribution, or use of the contents of this information is strictly prohibited. If you have received this e-mail in error, please contact the Electronic Data Interchange (EDI) Department at 646-458-6740 and delete and destroy the original message and all copies.

Slide notes

A sample of an e-mail alert is shown here.

The e-mail alert will contain the case number and the type of error found and will invite the submitter to view the alert or letter on the WCMSAP.

Most alerts are informational; however, some require action on the case.

You must read the alert and respond if necessary.

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The screenshot shows the homepage of the Workers' Compensation Set-Aside Web Portal. At the top left is the CMS logo (Center for Medicare & Medicaid Services). In the center is the title "Workers' Compensation Set-Aside Web Portal". At the top right is the COB&R logo (Coordination of Benefits and Recovery). Below the title is a navigation bar with links: Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Logoff. A "Skip Navigation" link is also present. The main content area is titled "WCMSAP" and contains a paragraph explaining the portal's purpose: "The WCMSAP provides an interface for entry of Workers' Compensation Medicare Set-Aside (WCMSA) proposals. You may use this site to enter the case information directly. The site also provides the ability to track submitted cases and the statuses without inquiry to the BCRC or CMS. Case Lookup and View Alert functions are also available. Click the desired link below to perform that function." Below this paragraph is another paragraph: "You may modify Account Settings by clicking the appropriate link under the Account Settings list." To the right of the main text is a "QUICK HELP" box with a link "Help About This Page". Below that is an "Account Settings" box with links: "Update Personal Information", "Update Account Information", "Designee Maintenance", "View Account Activity", and "Change Password". On the left side of the main content area, under the heading "I'd like to...", there are three links: "Create a New Case", "Case Lookup", and "View Alerts".

Slide notes

To view Alerts click the View Alerts link from the WCMSAP Home page.

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Alerts

This page lists all alerts that correspond to the Account ID(s) you are registered under. You can select a notification to view by clicking on the Alert ID. The data is sorted by Creation Date and Case Number descending.

You can perform a search by entering the search criteria and clicking the 'Search' button.

Case Control Number:

Status: **All**

HICN: OR SSN:

Alert Creation Date Range:

From Date: / / (MM/DD/CCYY) To Date: / / (MM/DD/CCYY)

Alert ID	Creation Date	Alert Type	Case Number	Creator	Status	HICN/SSN	Bene Name
01	2010-02-15	Development	123456	RO	Open	*****##A	FIRST LAST
02	2010-02-14	Deny	987654	WCRC	Archived	*****##B	FIRST LAST

Slide notes

The Alerts page will display.

By default, this page lists all alerts for the previous 60 days associated with the Account ID you are registered under.

The data is sorted by Creation Date in descending order, however, you may sort the listing by case number and/or creation date.

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Alerts

This page lists all alerts that correspond to the Account ID(s) you are registered under. You can select a notification to view by clicking on the Alert ID. The data is sorted by Creation Date and Case Number descending.

You can perform a search by entering the search criteria and clicking the 'Search' button.

Case Control Number:

Status: **All**

HICN: OR SSN:

Alert Creation Date Range:

From Date: / / (MM/DD/CCYY) To Date: / / (MM/DD/CCYY)

Alert ID	Creation Date	Alert Type	Case Number	Creator	Status	HICN/SSN	Bene Name
01	2010-02-15	Development	123456	RO	Open	*****A	FIRST LAST
02	2010-02-14	Deny	987654	WCRC	Archived	*****B	FIRST LAST

Slide notes

If the specific Alert is not in the current display list, you have the ability to search for the alert using various search criteria.

You may search for alerts using any or all of the following fields to narrow down your search results:

Case Control Number - the number assigned to the WCMSAP case by the system;

Case Status - the status associated to the alert. Options are Read, Not Read and, Archived;

HICN – the Health Insurance Claim Number of the Beneficiary/Claimant associated to the alert;

SSN - the Social Security Number of the Beneficiary/Claimant associated to the alert; and

Creation From and To Date Range - the beginning and ending case creation dates.

Please Note: Dates must be entered in a two position month, two position day and four position year format.

Once you have populated all relevant search criteria, click the Search button.

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Alerts

This page lists all alerts that correspond to the Account ID(s) you are registered under. You can select a notification to view by clicking on the Alert ID. The data is sorted by Creation Date and Case Number descending.

You can perform a search by entering the search criteria and clicking the 'Search' button.

Case Control Number:

Status: **All**

HICN: OR SSN:

Alert Creation Date Range:

From Date: / / (MM/DD/CCYY) To Date: / / (MM/DD/CCYY)

Alert ID	Creation Date	Alert Type	Case Number	Creator	Status	HICN/SSN	Bene Name
01	2010-02-15	Development	123456	RO	Open	*****A	FIRST LAST
02	2010-02-14	Deny	987654	WCRC	Archived	*****B	FIRST LAST

Slide notes

The Alerts page will redisplay. The only alerts listed will be those that matched the search criteria that were also associated to your Account ID.

The Alert listing in the lower half of the Alerts page includes the following information related to the Alert:

Alert ID - the ID number associated to the alert;

Creation Date - the date the alert was created;

Alert Type - the type of alert. Most alerts are a letter, and the Alert Detail page will contain the letter in PDF format. Values for Alert Type include:

Below Threshold indicates a case where: the claimant is currently a Medicare beneficiary and the total settlement amount is \$25,000 or less; or the claimant does not have a reasonable expectation of Medicare enrollment within 30 months of the settlement date and the total settlement amount is \$250,000 or less.

Development - indicates that there is a need to gather additional information or documentation.

Deny - indicates that the proposed WCMSA amount has been denied.

Zero Set Aside - indicates that the settlement has been approved with a Medicare Set-Aside Amount of zero dollars.

Approval - indicates the settlement has been approved. This alert includes recommendation attachments.

Closeout - indicates the WCMSA case has been closed.

Deceased Beneficiary - indicates that the system found a date of death for the beneficiary. This alert does not produce a letter.

Co-Mingling - indicates that documents must be replaced on the case. Only files that have been flagged as replaceable can be replaced. This alert does not produce a letter.

(Note: When co-mingling has occurred the system must check to confirm that a replacement file was provided by the user.

The case will be automatically closed if the replacement documentation is not received within 10 business days).

Case Number - the Case Control Number associated with the alert;

Creator - the entity that entered the alert. Options are WCRC and Regional Office (RO).

Status - the status of the alert. Options are Open or Archived.

HICN/SSN - the HICN or SSN of the beneficiary or claimant associated with the case. The first 5 digits of the HICN or SSN are masked by asterisks.

Bene Name - the name of the beneficiary or claimant associated with the case.

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Workers' Compensation Set-Aside Web Portal

[Skip Navigation](#)

HomeAbout This SiteCMS LinksHow To...Reference MaterialsContact UsLogoff

Alerts

This page lists all alerts that correspond to the Account ID(s) you are registered under. You can select a notification to view by clicking on the Alert ID. The data is sorted by Creation Date and Case Number descending.

You can perform a search by entering the search criteria and clicking the 'Search' button.

Case Control Number:

Status: All ▼

HICN: OR SSN: --

Alert Creation Date Range:
From Date: / / (MM/DD/CCYY) To Date: / / (MM/DD/CCYY)

Alert ID	Creation Date	Alert Type	Case Number	Creator	Status	HICN/SSN	Bene Name
01	2010-02-15	Development	123456	RO	Open	*****A	FIRST LAST
02	2010-02-14	Deny	987654	WCRC	Archived	*****B	FIRST LAST

QUICK HELP

[Help About This Page](#)

Slide notes

To view a specific alert, click on an Alert ID.

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Where possible, please submit any requested documents via the website instead of faxing or mailing.



DEPARTMENT OF HEALTH & HUMAN SERVICES
Centers for Medicare & Medicaid Services

March 18, 2013

Name: [redacted]
Address: [redacted]
City, State, Zip: [redacted]

RE: Workers' Compensation Medicare Set-aside Arrangement

Claimant:
HICN/SSN:
Date of Injury: 12/05/2009
CMS Case Control Number: WC

Dear BIG BUSINESS, LLC INC

This letter is in response to your initial proposal submitted on 01/21/2013 for a Workers' Compensation Medicare Set-aside Arrangement (WCMSA) on behalf of the above named individual.

You proposed that a WCMSA in the amount of \$125,000.00 be available for the purposes of paying for future medical services related to the work injury or disease that would otherwise be reimbursable by Medicare.

We have evaluated your proposal to protect Medicare's interests with a WCMSA for future medical expenses related to [redacted]'s work injury or disease. We have determined that \$250,000.00, adequately considers Medicare's interests.

The current treatment records **do not indicate** that the claimant has been prescribed drugs and/or may need future prescription drug treatment related to the WC injury that is covered by Medicare. As a result, Medicare's interests have been adequately protected with regard to future prescription drug treatment. Therefore, Medicare will pay primary for future prescription drugs if the beneficiary has enrolled in a Medicare prescription drug plan and does not have any other coverage that is primary to Medicare.

The WCMSA funds must be placed in an interest bearing account. Funds must be available for payment of services and prescription drug expenses that would otherwise be covered by Medicare with an initial deposit of \$23,810.00 and subsequent equal payments of \$11,309.00 over 20 years.

Slide notes

When the Alert ID is clicked, the system will display the Alert Detail page for the selected alert.

The Alert Detail page will include all details for the selected alert.

Most alerts are accompanied by letters. In most instances, the Alert Detail page will display the contents of the letter in PDF format.

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Workers' Compensation Set-Aside Web Portal



[Skip Navigation](#)

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About This Site
CMS Links
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Contact Us
Logoff

Alerts

This page lists all alerts that correspond to the Account ID(s) you are registered under. You can select a notification to view by clicking on the Alert ID. The data is sorted by Creation Date and Case Number descending.

You can perform a search by entering the search criteria and clicking the 'Search' button.

Case Control Number:

Status: All

HICN: OR SSN:

Alert Creation Date Range:

From Date: / / (MM/DD/CCYY) To Date: / / (MM/DD/CCYY)

Alert ID	Creation Date	Alert Type	Case Number	Creator	Status	HICN/SSN	Bene Name
01	2010-02-15	Development	123456	RO	Open	*****A	FIRST LAST
02	2010-02-14	Deny	987654	WCRC	Archived	*****B	FIRST LAST

QUICK HELP

[Help About This Page](#)

Slide notes

You may also have the option to view all alerts associated to a specific case by clicking on a specific Case Number.

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Workers' Compensation Set-Aside Web Portal


[Skip Navigation](#)

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About This Site
CMS Links
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Reference Materials
Contact Us
Logoff

Alert Listing

Case Number: #####

This page lists all the alerts for the selected case. The data is sorted by Alert Creation Date (descending).

Alert ID	Alert Creation Date	Alert Type	Creator	Status	HICN/SSN	Bene Name
127	01/31/2011	Under Threshold	WCSA	READ	#####A	FIRST LAST
125	01/31/2011	Denied	WCSA	READ	#####B	FIRST LAST

Slide notes

When the case number link is selected, the system will display the Alert Listing page where all alerts associated to the selected case will be displayed.

You can then click an Alert ID link to view a specific alert.

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Where possible, please submit any requested documents via the website instead of faxing or mailing.



DEPARTMENT OF HEALTH & HUMAN SERVICES
Centers for Medicare & Medicaid Services

March 18, 2013

Name[
Address[
City, State Zip[

RE: Workers' Compensation Medicare Set-aside Arrangement

Claimant:
HICN/SSN:
Date of Injury: 12/05/2009
CMS Case Control Number: WC

Dear BIG BUSINESS, LLC INC

This letter is in response to your initial proposal submitted on 01/21/2013 for a Workers' Compensation Medicare Set-aside Arrangement (WCMSA) on behalf of the above named individual.

You proposed that a WCMSA in the amount of \$125,000.00 be available for the purposes of paying for future medical services related to the work injury or disease that would otherwise be reimbursable by Medicare.

We have evaluated your proposal to protect Medicare's interests with a WCMSA for future medical expenses related to 's work injury or disease. We have determined that \$250,000.00, adequately considers Medicare's interests.

The current treatment records **do not indicate** that the claimant has been prescribed drugs and/or may need future prescription drug treatment related to the WC injury that is covered by Medicare. As a result, Medicare's interests have been adequately protected with regard to future prescription drug treatment. Therefore, Medicare will pay primary for future prescription drugs if the beneficiary has enrolled in a Medicare prescription drug plan and does not have any other coverage that is primary to Medicare.

The WCMSA funds must be placed in an interest bearing account. Funds must be available for payment of services and prescription drug expenses that would otherwise be covered by Medicare with an initial deposit of \$23,810.00 and subsequent equal payments of \$11,309.00 over 20 years.

Slide notes

Again, once an Alert ID is clicked, the system will display the Alert Detail page for the selected Alert.

Once a specific alert has been accessed, you should read the alert and determine what actions need to be taken. If the alert requires changes to the account, access the case using the Case Lookup link on the WCMSAP Home page.

Please see the Case Lookup CBT for more information on how to access a WCMSA case.

After viewing the alert, click the Archive This Alert button to change the alert status to Archived. Click the Close this Window button to close the alert and return to the previous page.

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You have completed the WCMSAP Alerts 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/user
Manual/WCMSAUserManual.pdf](https://www.cob.cms.hhs.gov/WCMSA/help/userManual/WCMSAUserManual.pdf).

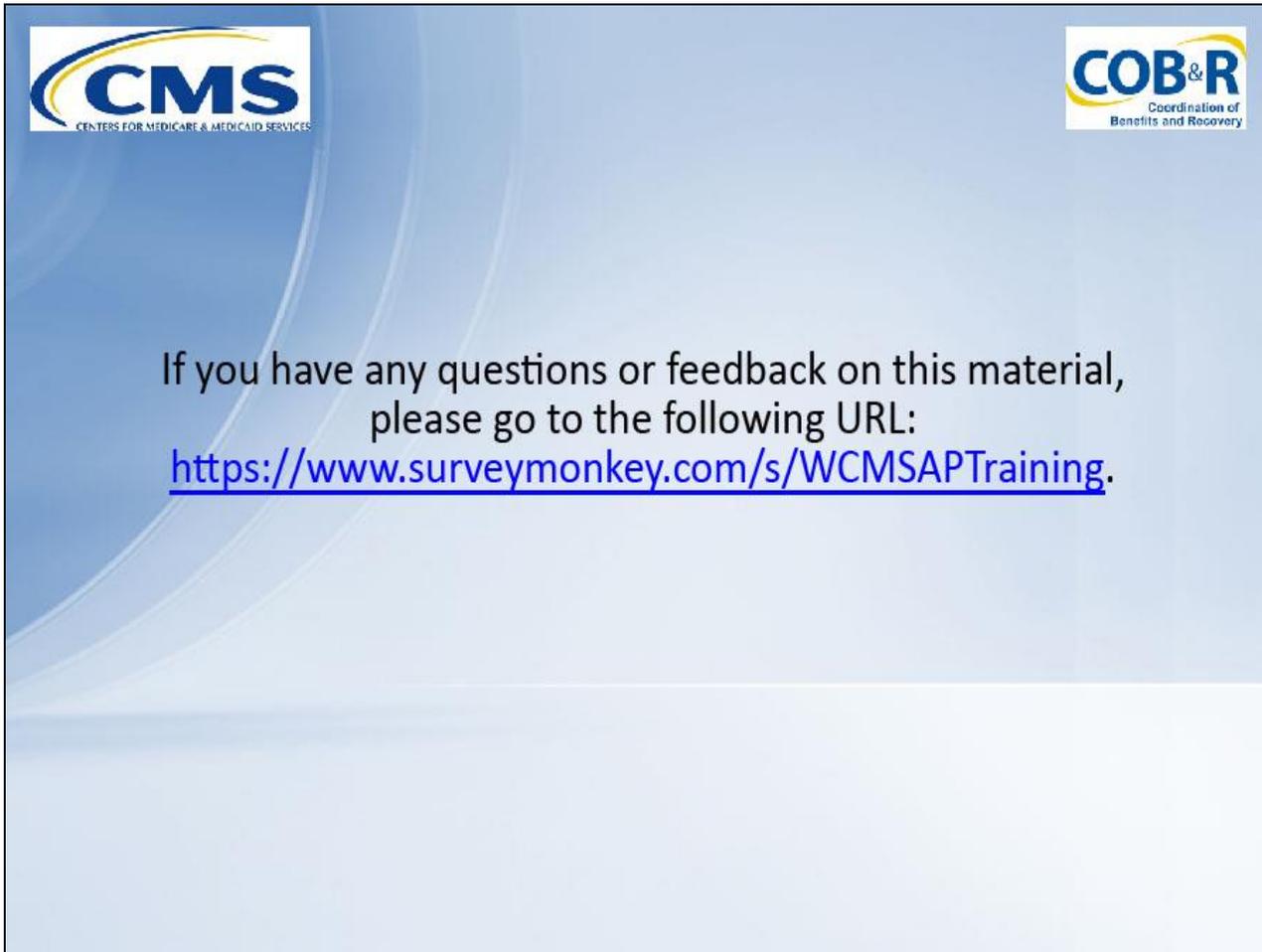
Slide notes

You have completed the WCMSAP Alerts 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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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: <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>.