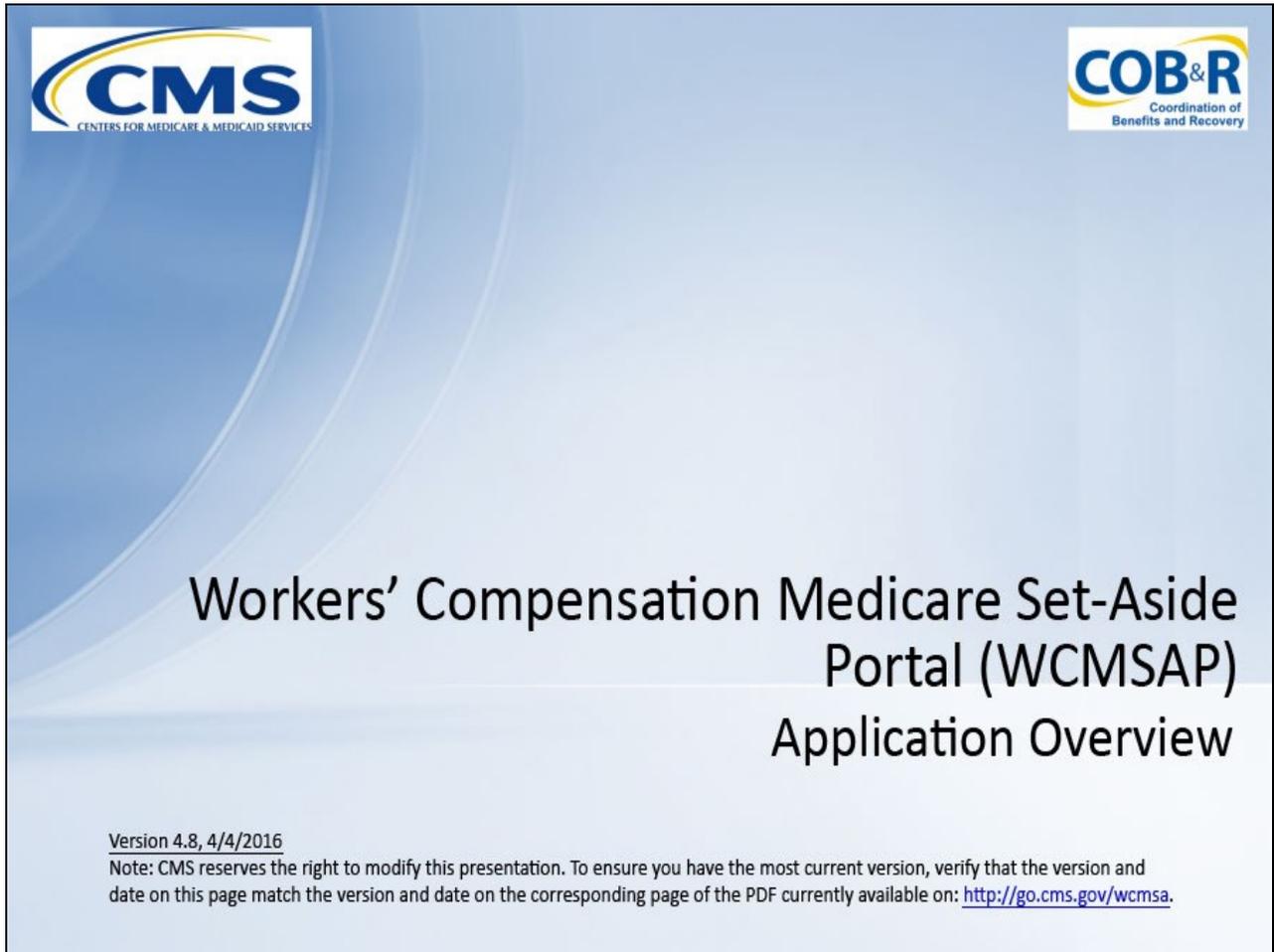


Slide 1 - of 32



The slide features a light blue background with abstract 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 the lower half of the slide. At the bottom left, there is a version number and a note with a URL.

**CMS**  
CENTERS FOR MEDICARE & MEDICAID SERVICES

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

# Workers' Compensation Medicare Set-Aside Portal (WCMSAP) Application Overview

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) Application Overview 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 [CC] button in the lower right hand corner of the screen.

Slide 2 - of 32

## 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 32

## Course Overview

- Navigating the WCMSAP
- Menu options



**Slide notes**

This course will provide an overview on how to navigate the WCMSAP and the menu options listed on the Home page.

Slide 4 - of 32

The screenshot shows the WCMSAP home page. 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 two paragraphs of introductory text. The first paragraph explains the site's purpose for entering and tracking proposals. The second paragraph mentions account settings. Below the text are three links: "Create a New Case", "Case Lookup", and "View Alerts". On the right side, there are two boxes: "QUICK HELP" with a link to "Help About This Page", and "Account Settings" with links for "Update Personal Information", "Update Account Information", "Designee Maintenance", "View Account Activity", and "Change Password".

Slide notes

After a successful login, the WCMSAP Home page is displayed.

## Slide 5 - of 32

The screenshot displays the WCMSAP homepage. At the top left is the CMS logo (Centers 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 menu with links: Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Logoff. A "Skip Navigation" link is located in the top right corner. The main content area is titled "WCMSAP" and contains two paragraphs of introductory text. The first paragraph explains the site's purpose for entering and tracking proposals. The second paragraph mentions account settings. Below the text are three links: "Create a New Case", "Case Lookup", and "View Alerts". On the right side, there are two boxes: "QUICK HELP" with a link to "Help About This Page", and "Account Settings" with links for "Update Personal Information", "Update Account Information", "Designee Maintenance", "View Account Activity", and "Change Password".

## Slide notes

The navigation menu at the top of each page gives the user access to various parts of the WCMSAP to facilitate using the application through the following menu options: "About This Site"; "CMS Links"; "How To"; "Reference Materials"; and "Contact Us".

Slide 6 - of 32

**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 [Skip Navigation](#)

## WCMSAP

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.

You may modify Account Settings by clicking the appropriate link under the Account Settings list.

**I'd like to...**

- [Create a New Case](#)
- [Case Lookup](#)
- [View Alerts](#)

**QUICK HELP**

- [Help About This Page](#)

**Account Settings**

- [Update Personal Information](#)
- [Update Account Information](#)
- [Designee Maintenance](#)
- [View Account Activity](#)
- [Change Password](#)

Slide notes

About This Site navigates to the How to Use This Site link, offering general information on how to use the WCMSAP application.

Slide 7 - of 32

**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 [Skip Navigation](#)

## WCMSAP

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.

You may modify Account Settings by clicking the appropriate link under the Account Settings list.

**I'd like to...**

- [Create a New Case](#)
- [Case Lookup](#)
- [View Alerts](#)

**QUICK HELP**

- [Help About This Page](#)

**Account Settings**

- [Update Personal Information](#)
- [Update Account Information](#)
- [Designee Maintenance](#)
- [View Account Activity](#)
- [Change Password](#)

Slide notes

CMS Links provides links to the Workers' Compensation Agency Services page, the Medicare Web site, and the Coordination of Benefits & Recovery Overview Web site.

## Slide 8 - of 32

The screenshot shows the homepage of the Workers' Compensation Set-Aside Web Portal. At the top left is the CMS logo (Centers 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 the following text:

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.

You may modify Account Settings by clicking the appropriate link under the Account Settings list.

**I'd like to...**

- [Create a New Case](#)
- [Case Lookup](#)
- [View Alerts](#)

On the right side, there are two boxes:

- QUICK HELP**
  - [Help About This Page](#)
- Account Settings**
  - [Update Personal Information](#)
  - [Update Account Information](#)
  - [Designee Maintenance](#)
  - [View Account Activity](#)
  - [Change Password](#)

## Slide notes

The How To section provides detailed information on performing the following functions:

"Getting Started"; "Requesting your Login ID"; "Requesting your Password"; "Changing your Password"; "Resetting your PIN"; "Changing your Authorized Representative"; "Changing Your Account Manager"; "Inviting Account Designees".

Slide 9 - of 32

The screenshot shows the homepage of the Workers' Compensation Set-Aside Web Portal. At the top left is the CMS logo (Centers 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 dark blue navigation bar with links: Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Logoff. A "Skip Navigation" link is located at the top right of the page content. The main heading is "WCMSAP". The text describes 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 text, it says "You may modify Account Settings by clicking the appropriate link under the Account Settings list." There are two columns of links. The left column, under the heading "I'd like to...", includes "Create a New Case", "Case Lookup", and "View Alerts". The right column, under the heading "QUICK HELP", includes "Help About This Page" and a box titled "Account Settings" containing "Update Personal Information", "Update Account Information", "Designee Maintenance", "View Account Activity", and "Change Password".

Slide notes

Reference Materials provides a link to the WCMSAP User Manual.

## Slide 10 - of 32

The screenshot shows the homepage of the Workers' Compensation Set-Aside Web Portal. At the top left is the CMS logo (Centers 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 the following text:

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.

You may modify Account Settings by clicking the appropriate link under the Account Settings list.

**I'd like to...**

- [Create a New Case](#)
- [Case Lookup](#)
- [View Alerts](#)

On the right side, there are two boxes:

- QUICK HELP**
  - [Help About This Page](#)
- Account Settings**
  - [Update Personal Information](#)
  - [Update Account Information](#)
  - [Designee Maintenance](#)
  - [View Account Activity](#)
  - [Change Password](#)

**Slide notes**

Contact Us displays a message which includes information on how to contact the Benefits Coordination & Recovery Center (BCRC).

If you have a program or technical problem involving your Section 111 data exchange, the first person to contact is your own EDI representative. Your EDI Representative should always be sought out first to help you find solutions for any questions, issues or problems you have.

If you have not yet been assigned an EDI Representative, please call the EDI Department number at 646-458-6740 for assistance.

Slide 11 - of 32

**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>

#### 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)

**Sign into your account**

User Name:  
  
[Forgot ID](#)

Password:  
  
[Forgot Password](#)

Login Clear

Slide notes

Bulletin board messages display on the WCMSAP Welcome page. These messages keep users informed of upcoming events, maintenance or other system-specific information.

Slide 12 - of 32

The screenshot shows the WCMSAP web portal. At the top left is the CMS logo (Centers 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 the following text: "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 text is another paragraph: "You may modify Account Settings by clicking the appropriate link under the Account Settings list." Underneath is a section titled "I'd like to..." with three links: "Create a New Case", "Case Lookup", and "View Alerts". On the right side of the page, there are two boxes. The top one is titled "QUICK HELP" and contains a link "Help About This Page". The bottom one is titled "Account Settings" and contains five links: "Update Personal Information", "Update Account Information", "Designee Maintenance", "View Account Activity", and "Change Password".

Slide notes

Users can select Quick Help to obtain access to on-line help documentation.

## Slide 13 - of 32

The screenshot shows the homepage of the Workers' Compensation Set-Aside Web Portal. At the top left is the CMS logo (Centers 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 the following text:

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.

You may modify Account Settings by clicking the appropriate link under the Account Settings list.

**I'd like to...**

- [Create a New Case](#)
- [Case Lookup](#)
- [View Alerts](#)

On the right side, there are two boxes:

- QUICK HELP**
  - [Help About This Page](#)
- Account Settings**
  - [Update Personal Information](#)
  - [Update Account Information](#)
  - [Designee Maintenance](#)
  - [View Account Activity](#)
  - [Change Password](#)

**Slide notes**

Users may also view/modify Account Settings. Access to the Account Settings functions is limited by user role (i.e., whether or not the user is set up as the Account Manager or the Account Designee).

For more information on the various Account Settings, see the Login and User Maintenance and Basic Functions-Account Manager CBTs.

## Slide 14 - of 32

The screenshot shows the homepage of the Workers' Compensation Set-Aside Web Portal. At the top left is the CMS logo (Centers 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 the following text:

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.

You may modify Account Settings by clicking the appropriate link under the Account Settings list.

**I'd like to...**

- [Create a New Case](#)
- [Case Lookup](#)
- [View Alerts](#)

On the right side, there are two boxes:

- QUICK HELP**
  - [Help About This Page](#)
- Account Settings**
  - [Update Personal Information](#)
  - [Update Account Information](#)
  - [Designee Maintenance](#)
  - [View Account Activity](#)
  - [Change Password](#)

**Slide notes**

Users of the WCMSAP can access and make changes to cases associated to their assigned Account ID(s). Account Managers have access to all associated cases, while Account Designees' case access is controlled by the Account Manager.

Case management is handled using the following functions: Create a New Case, Case Lookup, and View Alerts.

## Slide 15 - of 32

The screenshot shows the homepage of the Workers' Compensation Set-Aside Web Portal. At the top left is the CMS logo (Centers 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 the following text:

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.

You may modify Account Settings by clicking the appropriate link under the Account Settings list.

**I'd like to...**

- [Create a New Case](#)
- [Case Lookup](#)
- [View Alerts](#)

On the right side, there are two boxes:

- QUICK HELP**
  - [Help About This Page](#)
- Account Settings**
  - [Update Personal Information](#)
  - [Update Account Information](#)
  - [Designee Maintenance](#)
  - [View Account Activity](#)
  - [Change Password](#)

## Slide notes

Use the Create a New Case link to input Workers' Compensation Medicare Set-Aside case information and all relevant documentation.

## Slide 16 - of 32

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

## New Case Creation

QUICK HELP

  
[Help About This Page](#)

The information requested below will be systematically validated to ensure the Workers' Compensation Medicare Set-Aside (WCMSA) case does not already exist in the Web portal and that the data entered meets the criteria set for new case creation. A new WCMSA case should not be created if the beneficiary is deceased or the proposed settlement amount is under the threshold limits set for a WCMSA case.

Once the information is validated, you can continue adding case information, upload corresponding documentation in PDF file format, and if necessary, create a work-in-progress case. A work-in-progress case allows you to enter part of the new case information and save it to the WCMSAP. The information saved will be available when you return to the portal to complete the new case creation process.

To begin the new case creation process, enter the required data and click the 'Continue' button. To cancel the case creation, click the 'Cancel' button to return to the Home page.

An asterisk (\*) indicates a required field.

The Beneficiary/Claimant's Social Security Number (SSN) or Health Insurance Claim Number (HICN) must be provided. You may not provide both.

HICN: \*  OR SSN: \*  -  -

Initial Date of Injury: \*  /  /  (MM/DD/CCYY)

Last Name: \*  First Name: \*

Gender: \*

Date of Birth: \*  /  /  (MM/DD/CCYY)

Proposed Settlement Amount: \* \$

**Slide notes**

When the Create a New Case link is selected, the New Case Creation page will display.

The data entered on this screen will be used to verify that the case meets all new case requirements (e.g., a duplicate case does not already exist and that the proposed settlement amount is not under the threshold amount).

## Slide 17 - of 32

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

## New Case Creation

QUICK HELP

[Help About This Page](#)

The information requested below will be systematically validated to ensure the Workers' Compensation Medicare Set-Aside (WCMSA) case does not already exist in the Web portal and that the data entered meets the criteria set for new case creation. A new WCMSA case should not be created if the beneficiary is deceased or the proposed settlement amount is under the threshold limits set for a WCMSA case.

Once the information is validated, you can continue adding case information, upload corresponding documentation in PDF file format, and if necessary, create a work-in-progress case. A work-in-progress case allows you to enter part of the new case information and save it to the WCMSAP. The information saved will be available when you return to the portal to complete the new case creation process.

To begin the new case creation process, enter the required data and click the 'Continue' button. To cancel the case creation, click the 'Cancel' button to return to the Home page.

An asterisk (\*) indicates a required field.

The Beneficiary/Claimant's Social Security Number (SSN) or Health Insurance Claim Number (HICN) must be provided. You may not provide both.

HICN: \*  OR SSN: \*  -  -

Initial Date of Injury: \*  /  /  (MM/DD/CCYY)

Last Name: \*  First Name: \*

Gender: \* -Select-

Date of Birth: \*  /  /  (MM/DD/CCYY)

Proposed Settlement Amount: \* \$

## Slide notes

From the New Case Creation page, users can select Cancel or Continue. Cancel will return you to the Home page. The information entered will not be saved.

Continue will save your changes and take you to the Beneficiary/Claimant Information page if the case meets the minimum requirements.

Slide 18 - of 32

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

### Case Information

Beneficiary/Claimant\* Diagnosis Codes\* Prescriptions\* WC Carrier\* Employer\* Attorney Notes Documents\* Summary

#### Beneficiary/Claimant Information

A superscript <sup>(1)</sup> indicates a field is required for submission.

**QUICK HELP**  
Help About This Page

Last Name:  
First Name:  
MI:  
Beneficiary HICN: \*\*\*\*\*A<sup>1</sup>  
Beneficiary/Claimant SSN:  
Beneficiary/Claimant Date of Birth:  
Gender:  
Address Line 1: <sup>1</sup>  
Address Line 2:   
City: <sup>1</sup>  
State of Residence: <sup>1</sup> -Select-  
Zip Code: <sup>1</sup> -   
Phone:  -  -   
State where injury occurred: <sup>1</sup> -Select-  
Submitter Type: <sup>1</sup> -Select-

Next Save Work-In-Progress Case Summary Cancel Case Creation

Slide notes

The WCMSAP uses the following tabbed pages to store information related to the WCMSA case: Beneficiary/Claimant, Diagnosis Codes, Prescriptions, Workers' Compensation (WC) Carrier, Employer, Attorney, Notes, Documents, and Summary.

Tabs denoted with an asterisk indicate that data is required to be entered for that page.

For additional information on WCMSAP case creation, see the Case Submission CBT.

## Slide 19 - of 32

The screenshot shows the homepage of the Workers' Compensation Set-Aside Web Portal. At the top left is the CMS logo (Centers 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 the following text:

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.

You may modify Account Settings by clicking the appropriate link under the Account Settings list.

**I'd like to...**

- [Create a New Case](#)
- [Case Lookup](#)
- [View Alerts](#)

On the right side, there are two boxes:

- QUICK HELP**
  - [Help About This Page](#)
- Account Settings**
  - [Update Personal Information](#)
  - [Update Account Information](#)
  - [Designee Maintenance](#)
  - [View Account Activity](#)
  - [Change Password](#)

## Slide notes

The Case Lookup function is used to access and make changes to cases under an assigned Account ID(s). When a user clicks on the Case Lookup link, the Case Lookup screen will display.

Slide 20 - of 32

The screenshot shows the 'Case Lookup' 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). A navigation bar includes links for Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Logoff. A 'Skip Navigation' link is also present.

The main heading is 'Case Lookup'. Below it, a paragraph states: 'You can access Workers' Compensation Medicare Set-Aside (WCMSA) cases that have been submitted through the Web portal and are associated with your Login ID using various search criteria.' To the right of this text is a 'QUICK HELP' button with a link to 'Help About This Page'.

Instructions for searching are provided: 'Enter the search criteria in the provided fields and click 'Search.' Selecting 'Cancel' will return you to the Home page.' Helpful hints include:
 

- WIP cases do not have a Submission Date
- Date Range is limited to a maximum of six months

Search options are listed with radio buttons:
 

- All Cases (Both submitted and WIP cases)
- Submitted Cases Only
- WIP Cases Only

Search criteria fields include:
 

- Case Control Number:
- Health Insurance Claim Number (HICN):
- OR
- SSN:  -  -

Date range fields include:
 

- Case Creation Date Range: From Date  /  /  To Date:  /  /
- Case Submission Date Range: From Date  /  /  To Date:  /  /

At the bottom, there are 'Cancel' and 'Search' buttons.

Slide notes

From this page, users may access cases that are associated with their Login ID using various user-specified criteria.

Slide 21 - of 32

**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 [Skip Navigation](#)

### Case Lookup

You can access Workers' Compensation Medicare Set-Aside (WCMSA) cases that have been submitted through the Web portal and are associated with your Login ID using various search criteria.

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

Enter the search criteria in the provided fields and click 'Search.' Selecting 'Cancel' will return you to the Home page.  
 Helpful Hints:

- WIP cases do not have a Submission Date
- Date Range is limited to a maximum of six months

All Cases (Both submitted and WIP cases)  
 Submitted Cases Only  
 WIP Cases Only

Enter one of the following:

Case Control Number:  OR Health Insurance Claim Number (HICN):  -  -  OR SSN:  -  -

Date Range:

Case Creation Date Range:  
 From Date  /  /  To Date:  /  /

Case Submission Date Range:  
 From Date  /  /  To Date:  /  /

Slide notes

The fields on this page can be used to narrow search results.

Case listings may be requested for all cases (both submitted cases and work-in-progress (WIP) cases), submitted cases only, or work-in-progress cases only.

Slide 22 - of 32

**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 [Skip Navigation](#)

### Case Lookup

You can access Workers' Compensation Medicare Set-Aside (WCMSA) cases that have been submitted through the Web portal and are associated with your Login ID using various search criteria.

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

Enter the search criteria in the provided fields and click 'Search.' Selecting 'Cancel' will return you to the Home page.  
 Helpful Hints:

- WIP cases do not have a Submission Date
- Date Range is limited to a maximum of six months

All Cases (Both submitted and WIP cases)  
 Submitted Cases Only  
 WIP Cases Only

Enter one of the following:

Case Control Number:

Health Insurance Claim Number (HICN):  OR SSN:  -  -

Date Range:

Case Creation Date Range:  
 From Date  /  /  To Date:  /  /

Case Submission Date Range:  
 From Date  /  /  To Date:  /  /

Slide notes

The remaining fields are all optional but can also be used to narrow down the search results. Please see the Case Lookup CBT for more information on the Case Lookup function.

## Slide 23 - of 32

The screenshot shows the homepage of the Workers' Compensation Set-Aside Web Portal. At the top left is the CMS logo (Centers 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 two paragraphs of text. The first paragraph describes the interface for entering and tracking WCMSA proposals. The second paragraph explains how to modify account settings. Below the text are three links: "Create a New Case", "Case Lookup", and "View Alerts". On the right side, there are two boxes: "QUICK HELP" with a link to "Help About This Page", and "Account Settings" with links to "Update Personal Information", "Update Account Information", "Designee Maintenance", "View Account Activity", and "Change Password".

**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 [Skip Navigation](#)

## WCMSAP

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.

You may modify Account Settings by clicking the appropriate link under the Account Settings list.

**I'd like to...**

- [Create a New Case](#)
- [Case Lookup](#)
- [View Alerts](#)

**QUICK HELP**

- [Help About This Page](#)

**Account Settings**

- [Update Personal Information](#)
- [Update Account Information](#)
- [Designee Maintenance](#)
- [View Account Activity](#)
- [Change Password](#)

## Slide notes

The View Alerts function is used to access alerts for a WCMSA case.

## Slide 24 - of 32

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

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

## WCMSAP

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.

You may modify Account Settings by clicking the appropriate link under the Account Settings list.

**I'd like to...**

- [Create a New Case](#)
- [Case Lookup](#)
- [View Alerts](#)

**QUICK HELP**

- [Help About This Page](#)

**Account Settings**

- [Update Personal Information](#)
- [Update Account Information](#)
- [Designee Maintenance](#)
- [View Account Activity](#)
- [Change Password](#)

**Slide notes**

After cases have been submitted, the Workers' Compensation Recovery Center (WCRC) reviews each case for completeness and accuracy. If errors have been found in a submitted case, the WCRC sends an alert e-mail to the e-mail address provided during account setup.

The alert e-mail will contain the case number and the type of error found.

Most alerts are informational; however, some require action on the case. Users must read the alert and respond if necessary.

Slide 25 - of 32

The screenshot shows the WCMSAP web portal. At the top left is the CMS logo (Centers 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 two paragraphs of text. The first paragraph describes the interface for entering and tracking proposals. The second paragraph explains how to modify account settings. Below the text are three links: "Create a New Case", "Case Lookup", and "View Alerts". On the right side, there are two boxes: "QUICK HELP" with a link to "Help About This Page", and "Account Settings" with links for "Update Personal Information", "Update Account Information", "Designee Maintenance", "View Account Activity", and "Change Password".

Slide notes

To view an Alert, click on the View Alerts link.

Slide 26 - of 32

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

QUICK HELP

[Help About This Page](#)

## 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
<a href="#">01</a>	2010-02-15	Development	<a href="#">123456</a>	RO	Open	*****##A	FIRST LAST
<a href="#">02</a>	2010-02-14	Deny	<a href="#">987654</a>	WCRC	Archived	*****##B	FIRST LAST

Slide notes

The Alerts page displays. By default, this page will list all the alerts for the previous 60 days that are associated with the Account ID(s) the user registered under. Users can use the fields on the page to limit the alerts that are displayed.

Slide 27 - of 32

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

**Alerts**

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

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
<a href="#">01</a>	2010-02-15	Development	<a href="#">123456</a>	RO	Open	*****###A	FIRST LAST
<a href="#">02</a>	2010-02-14	Deny	<a href="#">987654</a>	WCRC	Archived	*****###B	FIRST LAST

Slide notes

Users have two options for viewing Alerts.

Slide 28 - of 32

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

**Alerts**

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

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
<a href="#">01</a>	2010-02-15	Development	<a href="#">123456</a>	RO	Open	*****###A	FIRST LAST
<a href="#">02</a>	2010-02-14	Deny	<a href="#">987654</a>	WCRC	Archived	*****###B	FIRST LAST

Slide notes

They may click the Alert ID number link which will display the specific alert or letter on the Alert Detail page.

Slide 29 - of 32

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

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

## 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
<a href="#">01</a>	2010-02-15	Development	<a href="#">123456</a>	RO	Open	*****###A	FIRST LAST
<a href="#">02</a>	2010-02-14	Deny	<a href="#">987654</a>	WCRC	Archived	*****###B	FIRST LAST

Slide notes

They may also click a Case Number link which will display all alerts for the selected case on the Alert Listing page.

Slide 30 - of 32

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

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

## 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
<a href="#">01</a>	2010-02-15	Development	<a href="#">123456</a>	RO	Open	*****###A	FIRST LAST
<a href="#">02</a>	2010-02-14	Deny	<a href="#">987654</a>	WCRC	Archived	*****###B	FIRST LAST

Slide notes

Please see the Alerts CBT for additional information on the various alerts that may be received for a case on the WCMSAP.

## Slide 31 - of 32



You have completed the Application Overview course. The information in this course can be referenced by using the document at the link below.

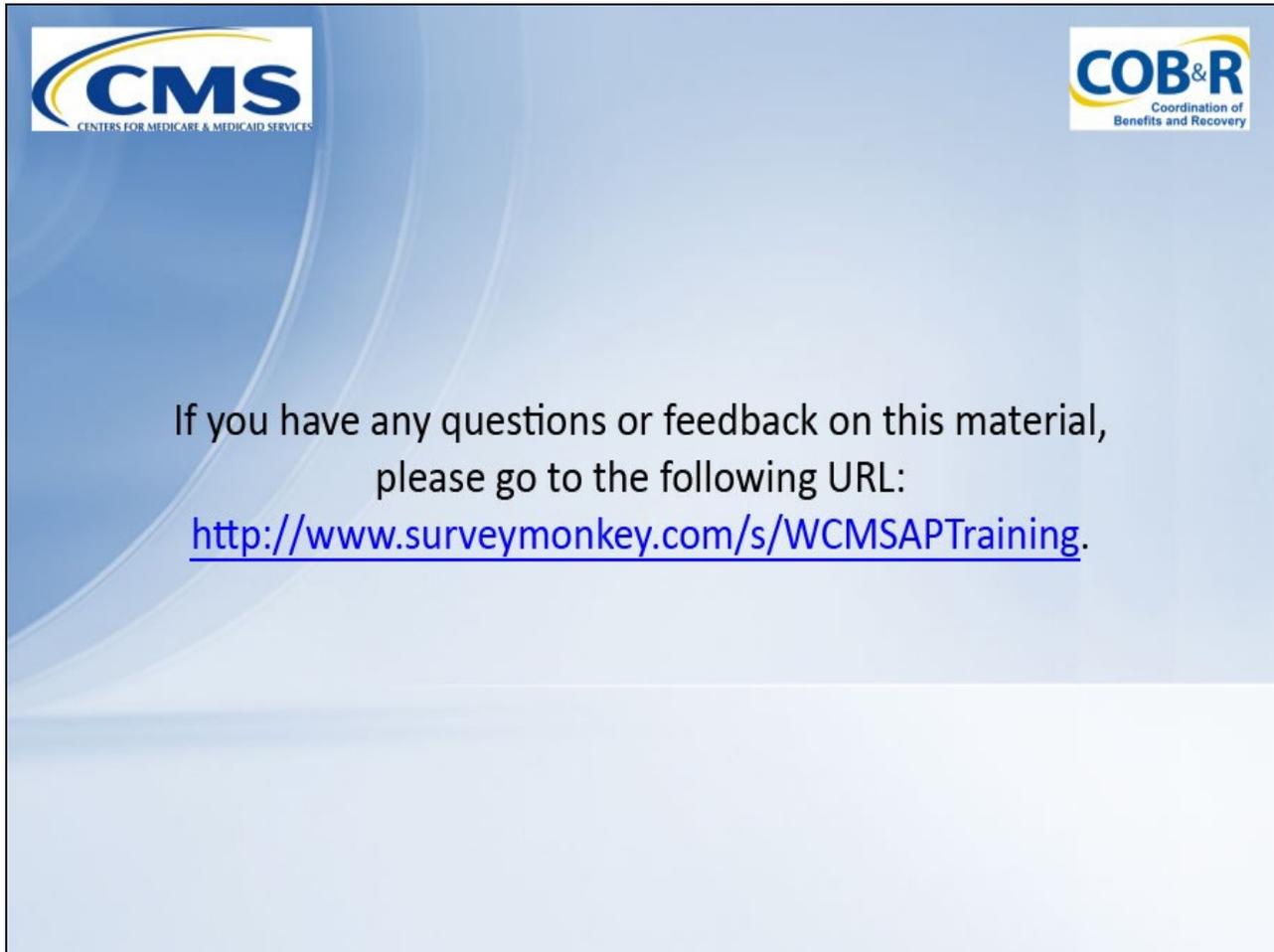
<https://www.cob.cms.hhs.gov/WCMSA/help/userManual/WCMSAUserManual.pdf>

**Slide notes**

You have completed the Application Overview 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 32 - of 32



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 in the center 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>.