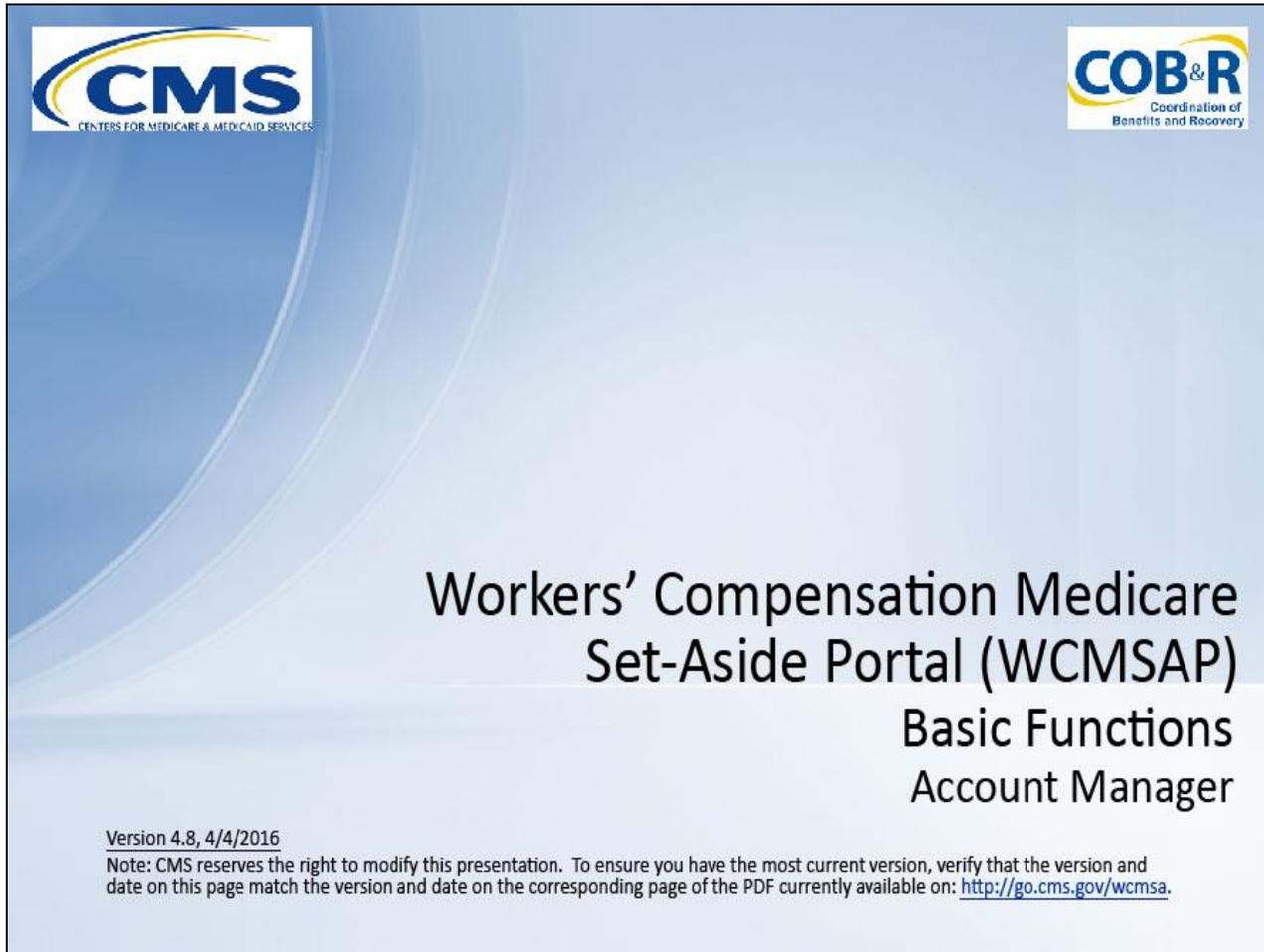


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The slide features a light blue background with abstract white curved lines. In the top left corner is the CMS logo (Centers for Medicare & Medicaid Services). In the top right corner is the COB&R logo (Coordination of Benefits and Recovery). The main title is centered in the lower half of the slide. At the bottom left, there is a version number and a note about the presentation's currency.

**CMS**  
CENTERS FOR MEDICARE & MEDICAID SERVICES

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

# Workers' Compensation Medicare Set-Aside Portal (WCMSAP) Basic Functions Account Manager

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) Basic Functions-Account Manager 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 Captioning [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

- Role of Account Manager
- Basic Functions
  - Manage account profile
  - Designee maintenance



**Slide notes**

This course describes the role and the basic functions available to the Account Manager including managing the account profile and designee maintenance.

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## Account Manager - Role

- Each WCMSAP account must have an Account Manager
  - Established during Account Setup
  - One per WCMSAP account
- Controls the administration of account and manages cases
- Registered user of system
- Has unlimited access to WCMSAP functionality
  - After they review, sign, and return profile report to the BCRC

### Slide notes

Each WCMSAP account must have an assigned Account Manager. The Account Manager is established during the Account Setup process. Each WCMSAP account can have only one Account Manager.

This is the individual who controls the administration of an organization's account and manages cases, which includes managing case access.

The Account Manager is a registered user of the system.

The Account Manager for Representative and Self accounts will have unlimited access to WCMSAP functionality and cases as soon as the Benefits Coordination & Recovery Center (BCRC) has received their signed profile report.

For Corporate account types, the Account Manager will only be granted access after the profile report is signed and returned by the Account Representative.

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## Account Manager - Role

Self	Corporate	Representative
<ul style="list-style-type: none"><li>• Submitter is Account Manager by default</li></ul>	<ul style="list-style-type: none"><li>• Account Manager assigned during Account Setup</li></ul>	<ul style="list-style-type: none"><li>• Account Manager assigned during Account Setup</li><li>• Submitter is Account Manager by default</li></ul>

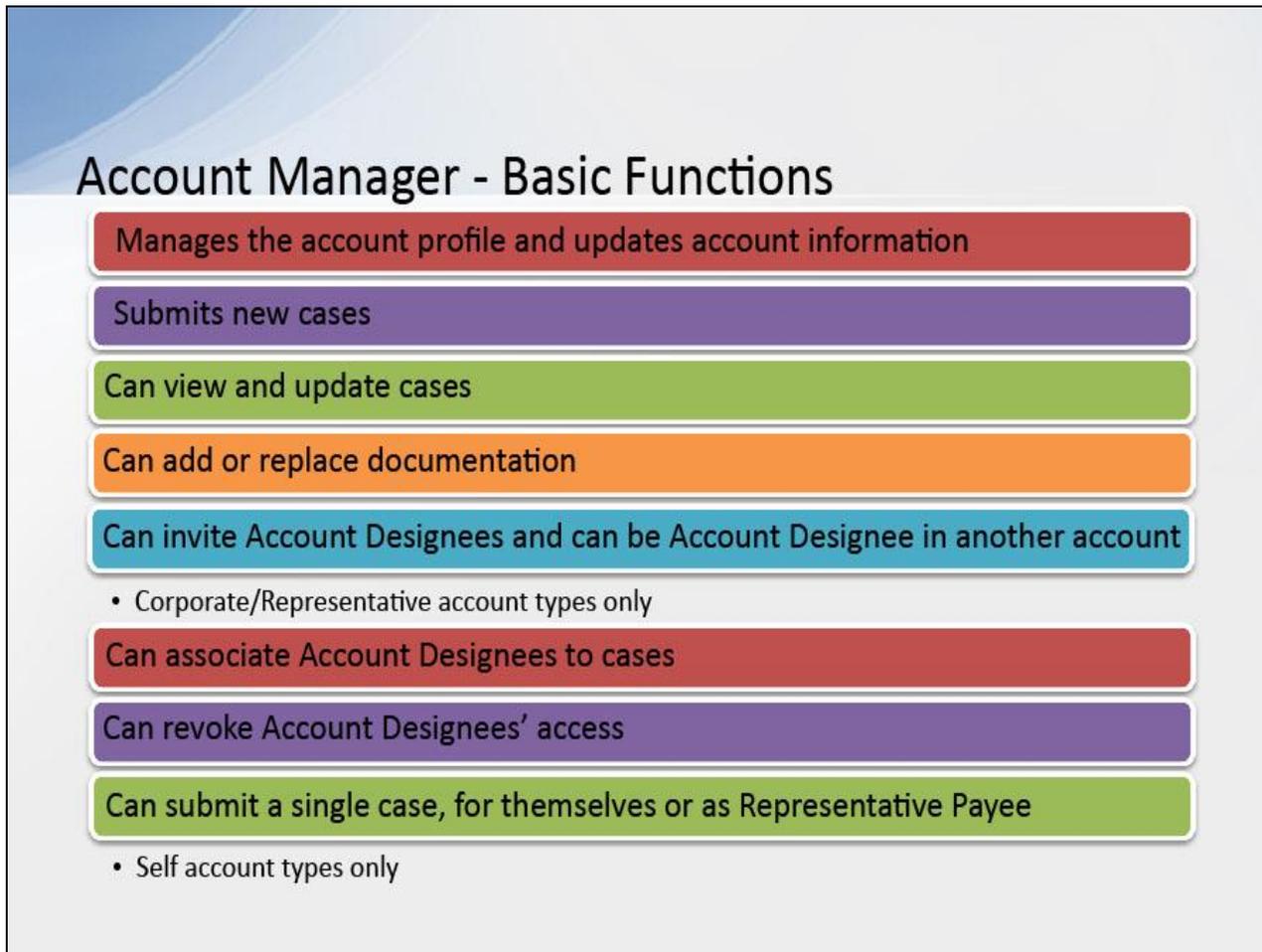
**Slide notes**

The Account Manager for Self account types is, by default, the submitter.

For Corporate and Representative account types, the Account Manager is assigned during the Account Setup process.

For Representative accounts, the submitter may be the Account Manager, but they have the option to assign the Account Manager role to another person.

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The slide features a light blue header with the title 'Account Manager - Basic Functions'. Below the title are eight horizontal bars of varying colors, each containing a function. The first bar is red, the second is purple, the third is green, the fourth is orange, the fifth is blue, the sixth is red, the seventh is purple, and the eighth is green. The fifth bar includes a bulleted sub-point.

## Account Manager - Basic Functions

- Manages the account profile and updates account information
- Submits new cases
- Can view and update cases
- Can add or replace documentation
- Can invite Account Designees and can be Account Designee in another account
  - Corporate/Representative account types only
- Can associate Account Designees to cases
- Can revoke Account Designees' access
- Can submit a single case, for themselves or as Representative Payee
  - Self account types only

### Slide notes

The Account Manager manages the WCMSAP account's profile information and updates general account information;

Submits new cases for the WCMSAP account they are associated with;

Can view and update all cases for the WCMSAP account they are associated with;

Can add or replace documentation to a specific case for the account;

Can invite other users to function as Account Designees and can be an Account Designee in another account. (Account Designees are for Corporate or Representative account types only.);

Can associate an Account Designee to cases;

Can revoke Account Designee's' access to cases and/or an entire WCMSAP account;

Can submit a single case, as an Account Manager or as a Representative Payee. (For Self account types only.);

To replace an Account Manager, the Account Representative for Corporate accounts, or the original submitter for Representative accounts, must contact the Electronic Data interchange (EDI) Department.

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**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**  
New Registration →

**STEP 2**  
Account Setup →  
(Account ID and PIN required)

**Sign into your account**

User Name:  
  
[Forgot ID](#)

Password:  
  
[Forgot Password](#)

Login Clear

Slide notes

To access a WCMSAP account and manage the case submission process, the Account Manager must first successfully login to the WCMSAP application.

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**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 a successful logon, the WCMSAP Home page will display.

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The screenshot displays the WCMSAP web portal. At the top left is the CMS logo (Center for Medicare & Medicaid Services) and the title "Workers' Compensation Set-Aside Web Portal". At the top right is the COB&R logo (Coordination of Benefits and Recovery). A navigation bar below the title contains links for Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Logoff, with a "Skip Navigation" link on the far right. 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 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 are two boxes. The first is titled "QUICK HELP" and contains a link "Help About This Page". The second is titled "Account Settings" and contains five 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

From this page, the Account Manager can manage cases and manage account access.

## Slide 10 - of 54

The screenshot shows the WCMSAP 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 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

Case access is controlled through the Account Settings. Although Account Managers have access to all of the Account Settings, the focus of this CBT is on Update Account Information and Designee Maintenance.

For more information on the other Account Settings, please see the Login and User Maintenance CBT.

## Slide 11 - of 54

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 logos 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 site'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 revise account information, the Account Manager will click the Update Account Information link in the Account Settings box on the Home page.

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**Update Corporate Information**

You may edit the account information or Account Representative information by clicking on the Edit button of that section. You may not change the Account Type.

Account Type: Corporate

**Corporate Information**

Employer Identification Number (EIN): #####

Corporate Name: AAAAAAAAAAAAA

Business Mailing Address:

Address Line 1: AAAAAAAAAAAAA

Address Line 2: AAAAAAAAAAAAA

City: AAAAAAAAAAAAA

State: AAAAAAAAAAAAA

Zip Code: #####

**Account Representative Information**

First Name: FIRSTMI: M Last Name: LAST

Title: AAAAAAAAAAAAA

Date of Birth: #####

E-Mail Address: AAAAAAAAAAAAA

Phone: ###-###-#### ext. ####

Fax: ###-###-####

[Print this page](#)

**QUICK HELP**

[Help About This Page](#)

[Skip Navigation](#)

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

Slide notes

When the Update Account Information link is clicked, an Update Information page will display.

The one pictured here, Update Corporate Information page, is what will display for Corporate users. This page lists the account’s mailing address, and Account Representative contact information.

Please note: The Update Information screens for Representative and Self account types are very similar and function the same way.

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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](#)

### Update Corporate Information

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

You may edit the account information or Account Representative information by clicking on the Edit button of that section. You may not change the Account Type.

Account Type: Corporate

<b>Corporate Information</b> <input type="button" value="Edit"/>	<b>Account Representative Information</b> <input type="button" value="Edit"/>
Employer Identification Number (EIN): #####	First Name: FIRSTMI: M Last Name: LAST
Corporate Name: AAAAAAAAAAAAA	Title: AAAAAAAAAA
Business Mailing Address:	Date of Birth: #####
Address Line 1: AAAAAAAAAAAAA	E-Mail Address: AAAAAAAAAA
Address Line 2: AAAAAAAAAAAAA	Phone: ###-###-#### ext. ####
City: AAAAAAAAAAAAA	Fax: ###-###-####
State: AAAAAAAAAA	
Zip Code: #####	

Slide notes

To make any corrections, click the Edit button next to the section that requires revisions to return to that page.

Note: If the Account Manager needs to replace their Account Representative with another person, they may do so by editing the Account Representative Information page.

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The screenshot shows the 'Corporate Information' section of the CMS Workers' Compensation Set-Aside Web Portal. The page header includes the CMS logo, the title 'Workers' Compensation Set-Aside Web Portal', and the COB&R logo. A navigation bar contains links for 'About This Site', 'CMS Links', 'How To...', 'Reference Materials', and 'Contact Us'. A 'Skip Navigation' link is also present. The main content area features a 'Corporate Information' heading, a note that an asterisk (\*) indicates a required field, and a 'QUICK HELP' button with a 'Help About This Page' link. The form fields include: Employer Identification Number (EIN) with an asterisk and a text input box; Corporation Name with an asterisk and a text input box; Business Mailing Address section with sub-fields: Address Line 1 with an asterisk and a text input box; Address Line 2 with a text input box; City with an asterisk and a text input box; State with an asterisk, a dropdown menu showing '- Select -', and a downward arrow; and Zip Code with an asterisk and two text input boxes. At the bottom left, there are three buttons: 'Previous', 'Next', and 'Cancel'.

Slide notes

Change or correct any of the information as needed.

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The screenshot shows the 'Corporate Information' page of the CMS Workers' Compensation Set-Aside Web Portal. The page header includes the CMS logo, the title 'Workers' Compensation Set-Aside Web Portal', and the COB&R logo. A navigation bar contains links for 'About This Site', 'CMS Links', 'How To...', 'Reference Materials', and 'Contact Us'. A 'Skip Navigation' link is also present. The main content area is titled 'Corporate Information' and includes a note: 'An asterisk (\*) indicates a required field.' The form fields are: 'Employer Identification Number (EIN): \*' with a text input box; 'Corporation Name: \*' with a text input box; 'Business Mailing Address:' with sub-fields for 'Address Line 1: \*', 'Address Line 2:', 'City: \*', 'State: \*' (a dropdown menu currently showing '- Select -'), and 'Zip Code: \*' (two separate input boxes for the zip code). A 'QUICK HELP' box on the right contains a 'Help About This Page' link. At the bottom left, there are three buttons: 'Previous', 'Next', and 'Cancel'.

Slide notes

Once all corrections have been made, click Next at the bottom of the page to navigate back to the Update Corporate Information page.

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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](#)

### Update Corporate Information

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

You may edit the account information or Account Representative information by clicking on the Edit button of that section. You may not change the Account Type.

Account Type: Corporate

<b>Corporate Information</b> <input type="button" value="Edit"/>	<b>Account Representative Information</b> <input type="button" value="Edit"/>
Employer Identification Number (EIN): #####	First Name: FIRSTMI: M Last Name: LAST
Corporate Name: AAAAAAAAAAAAA	Title: AAAAAAAAAA
Business Mailing Address:	Date of Birth: #####
Address Line 1: AAAAAAAAAAAAA	E-Mail Address: AAAAAAAAAA
Address Line 2: AAAAAAAAAAAAA	Phone: ###-###-#### ext. ####
City: AAAAAAAAAAAAA	Fax: ###-###-####
State: AAAAAAAAAA	
Zip Code: #####	

Slide notes

After you have returned to the Update Information page, click the Next button.

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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](#)

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

### Update Corporate Information

You may edit the account information or Account Representative information by clicking on the Edit button of that section. You may not change the Account Type.

Account Type: Corporate

<b>Corporate Information</b> <input type="button" value="Edit"/>	<b>Account Representative Information</b> <input type="button" value="Edit"/>
Employer Identification Number (EIN): #####	First Name: FIRSTMI: M Last Name: LAST
Corporate Name: AAAAAAAAAAAAA	Title: AAAAAAAAAA
Business Mailing Address:	Date of Birth: #####
Address Line 1: AAAAAAAAAAAAA	E-Mail Address: AAAAAAAAAA
Address Line 2: AAAAAAAAAAAAA	Phone: ###-###-#### ext. ####
City: AAAAAAAAAAAAA	Fax: ###-###-####
State: AAAAAAAAAA	
Zip Code: #####	

Slide notes

The system will display a warning message when a change is made to the WCMSAP account information indicating that the updated information will be used for all future official communications.

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The screenshot displays the 'Workers' Compensation Set-Aside Web Portal' with the CMS and COB&R logos. A navigation bar includes links for Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Logoff. The main content area is titled 'Corporate Information Update Confirmation' and includes a 'Print this page' icon. A 'QUICK HELP' box contains a 'Help About This Page' link. The confirmation message states: 'Your corporate information has been updated. Print this page for your records.' The information is organized into two columns: 'Corporate Information' and 'Account Representative Information'. The 'Corporate Information' column lists: Employer Identification Number (EIN): #####, Corporate Name: AAAAAAAAAAAAA, Business Mailing Address: Address Line 1: AAAAAAAAAAAAA, Address Line 2: AAAAAAAAAAAAA, City: AAAAAAAAAAAAA, State: AAAAAAAAAAAAA, and Zip Code: #####. The 'Account Representative Information' column lists: First Name: FIRSTMI:M Last Name: LAST, Title: AAAAAAAAAAAAA, Date of Birth: #####, E-Mail Address: AAAAAAAAAAAAA, Phone: ###-###-#### ext. ####, and Fax: ###-###-####. A 'Return to Home' button is located at the bottom left of the page.

Slide notes

Next, the system will display the Corporate Information Update Confirmation page, showing the updated information.

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The screenshot displays the 'Workers' Compensation Set-Aside Web Portal' interface. At the top left is the CMS logo (Center for Medicare & Medicaid Services) and at the top right is the COB&R logo (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 'Corporate Information Update Confirmation', with a 'Print this page' icon and link to its right. A 'QUICK HELP' box contains a 'Help About This Page' link. The message states: 'Your corporate information has been updated. Print this page for your records.' Below this, the page is divided into two columns: 'Corporate Information' and 'Account Representative Information'. The 'Corporate Information' column lists: Account Type: Corporate; Employer Identification Number (EIN): #####; Corporate Name: AAAAAAAAAAAAA; Business Mailing Address: Address Line 1: AAAAAAAAAAAAA; Address Line 2: AAAAAAAAAAAAA; City: AAAAAAAAAAAAA; State: AAAAAAAAAAAAA; Zip Code: #####. The 'Account Representative Information' column lists: First Name: FIRSTMI:M Last Name: LAST; Title: AAAAAAAAAAAAA; Date of Birth: #####; E-Mail Address: AAAAAAAAAAAAA; Phone: ###-###-#### ext. ####; Fax: ###-###-####. A 'Return to Home' button is located at the bottom left of the form area.

Slide notes

With the exception of a modification to an e-mail address, the system will send an e-mail to the Account Manager, indicating that the account information has been changed.

Included in the e-mail notification will be a profile report.

The Account Manager will be instructed to notify the BCRC if they did not initiate the update.

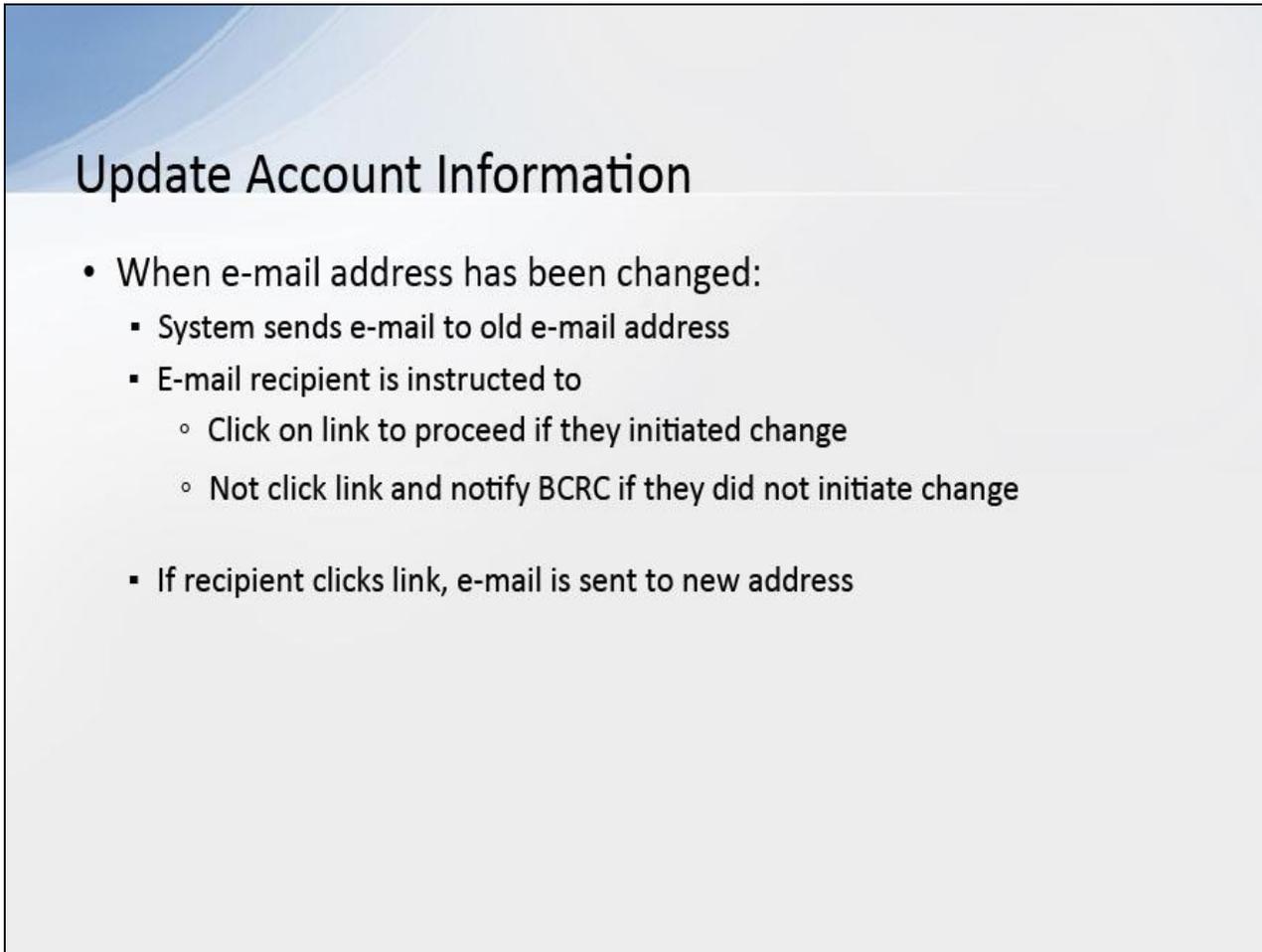
Slide 20 - of 54

The screenshot displays the 'Workers' Compensation Set-Aside Web Portal' with the CMS and COB&R logos. A navigation bar includes links for Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Logoff. The main content area is titled 'Corporate Information Update Confirmation' and includes a 'Print this page' icon. A 'QUICK HELP' box contains a 'Help About This Page' link. The confirmation message states: 'Your corporate information has been updated. Print this page for your records.' The page is divided into two columns: 'Corporate Information' and 'Account Representative Information'. The Corporate Information column lists: Employer Identification Number (EIN): #####, Corporate Name: AAAAAAAAAAAAA, Business Mailing Address: Address Line 1: AAAAAAAAAAAAA, Address Line 2: AAAAAAAAAAAAA, City: AAAAAAAAAAAAA, State: AAAAAAAAAAAAA, and Zip Code: #####. The Account Representative Information column lists: First Name: FIRST MI: M Last Name: LAST, Title: AAAAAAAAAAAAA, Date of Birth: #####, E-Mail Address: AAAAAAAAAAAAA, Phone: ### ### ### ext. ####, and Fax: ### ### ###. A 'Return to Home' button is located at the bottom left of the form area.

Slide notes

Click the Return to Home button to return to the WCMSAP Home page.

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The slide features a light blue header with a white curved graphic on the left. The main content area is white with a thin black border. The title 'Update Account Information' is in a large, dark font. Below it is a bulleted list with three main items, each containing sub-items. The first item is 'When e-mail address has been changed:', followed by 'System sends e-mail to old e-mail address' and 'E-mail recipient is instructed to', which has two sub-points: 'Click on link to proceed if they initiated change' and 'Not click link and notify BCRC if they did not initiate change'. The final main item is 'If recipient clicks link, e-mail is sent to new address'.**Slide notes**

When an e-mail address has been changed, the system will: Send an e-mail to the old e-mail address stating that an e-mail address change has been requested.

The e-mail recipient will be instructed to click on a link to proceed with the change, but only if they initiated the change.

The recipient will be instructed not to click the link and to notify the BCRC if they did not initiate the e-mail address change. If the recipient clicks the link, an e-mail reflecting the change will then be sent to the new e-mail address.

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**Slide notes**

For Corporate and Representative accounts, the Account Manager may designate one or more Account Designees to assist with case submission and management.

The Account Manager can perform the following Designee Maintenance functions:

Add an Account Designee, Edit information for an unregistered Account Designee, Regenerate an invitation e-mail with a token link for an Account Designee's registration, and Delete an Account Designee.

Note: You can also change an Account Designee into an Account Manager by calling your EDI Representative.

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The screenshot displays the WCMSAP web portal. At the top, there are logos for CMS (Center for Medicare & Medicaid Services) and COB&R (Coordination of Benefits and Recovery). The main title is "Workers' Compensation Set-Aside Web Portal". 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 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, it states: "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 "Account Settings", includes "Update Personal Information", "Update Account Information", "Designee Maintenance", "View Account Activity", and "Change Password". A "QUICK HELP" box with a "Help About This Page" link is also visible.

Slide notes

To manage Account Designees, the Account Manager will click the Designee Maintenance link from the Account Settings menu.

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

**Designee Listing**

This page provides the Designee(s) information for the individuals you have assigned to the account.

An Account Manager can only make changes to a pending Designee. Once the Designee has registered and has a Login ID, the Account Manager cannot make changes to the Designee information other than deleting the Designee from the account.

To make changes to the account of a particular Designee listed, select the link on the individual's last name. To delete a Designee select the Delete function to the left of the individual's name. Use the **Add a Designee** function to include an individual as a designee. Individuals added as designees will receive an e-mail notifying them that they have been invited to be a designee for the account.

Delete	Last Name	First Name	E-mail Address	Passphrase	Status
X	LAST	FIRST	AAAAAAAAAAAAA	AAAAAAA	Active
X	<a href="#">LAST</a>	FIRST	AAAAAAAAAAAAA	AAAAAAA	Pending

Slide notes

The Designee Listing page will display. All Designees and their associated statuses (Pending, Active, Locked, Expired, Revoked) will be listed.

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**Designee Listing**

This page provides the Designee(s) information for the individuals you have assigned to the account.

An Account Manager can only make changes to a pending Designee. Once the Designee has registered and has a Login ID, the Account Manager cannot make changes to the Designee information other than deleting the Designee from the account.

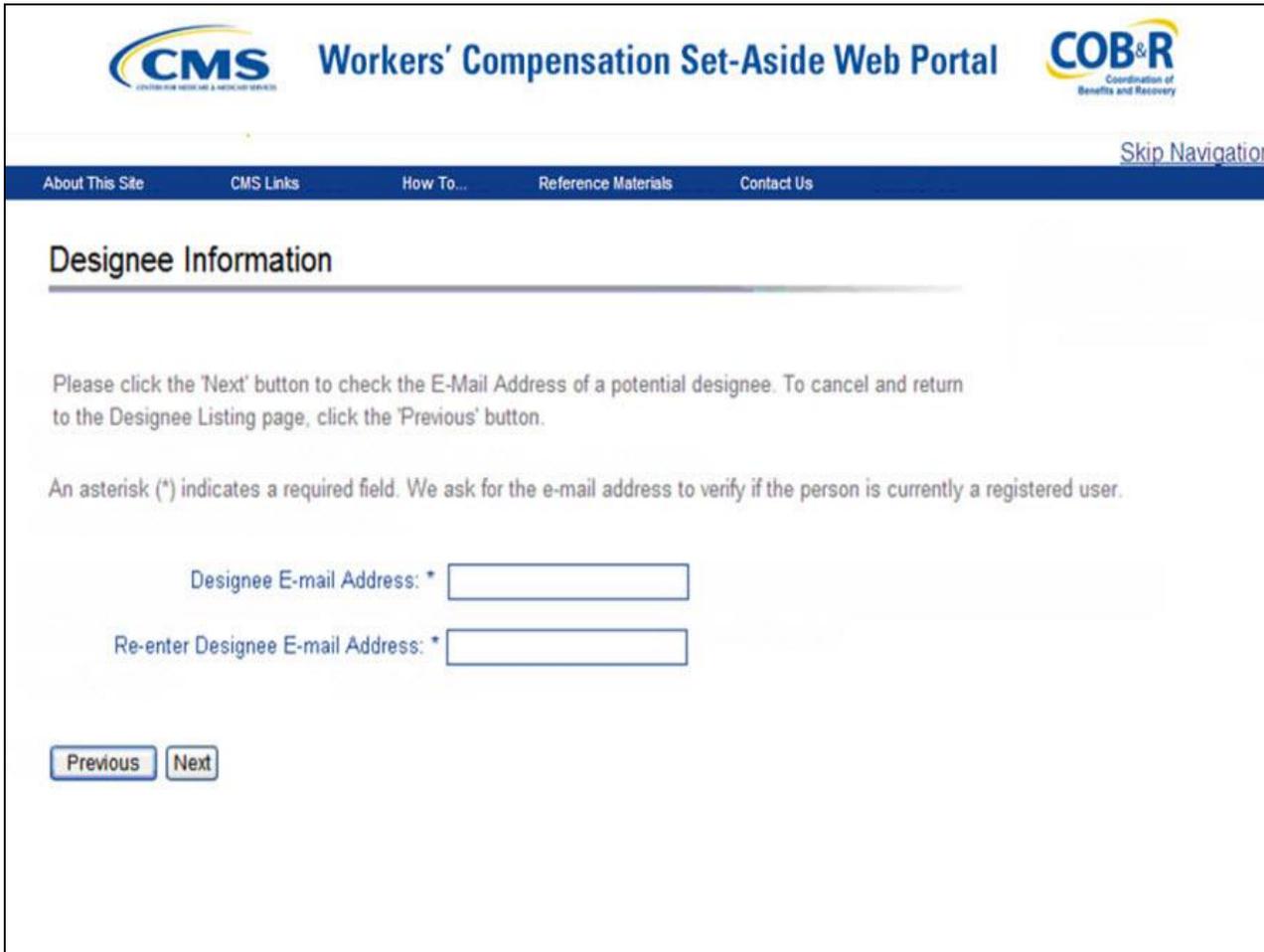
To make changes to the account of a particular Designee listed, select the link on the individual's last name. To delete a Designee select the Delete function to the left of the individual's name. Use the **Add a Designee** function to include an individual as a designee. Individuals added as designees will receive an e-mail notifying them that they have been invited to be a designee for the account.

Delete	Last Name	First Name	E-mail Address	Passphrase	Status
X	LAST	FIRST	AAAAAAAAAAAAA	AAAAAAA	Active
X	<a href="#">LAST</a>	FIRST	AAAAAAAAAAAAA	AAAAAAA	Pending

Slide notes

To add a potential Account Designee, the Account Manager must first invite them. To initiate this process, click Add a Designee.

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The screenshot displays the 'Workers' Compensation Set-Aside Web Portal' interface. At the top left is the CMS logo (Center for Medicare & Medicaid Services), and at the top right is the COB&R logo (Coordination of Benefits and Recovery). A navigation bar below the logos contains links for 'About This Site', 'CMS Links', 'How To...', 'Reference Materials', and 'Contact Us'. A 'Skip Navigation' link is located in the top right corner. The main content area is titled 'Designee Information' and includes the following text: 'Please click the 'Next' button to check the E-Mail Address of a potential designee. To cancel and return to the Designee Listing page, click the 'Previous' button.' Below this is a note: 'An asterisk (\*) indicates a required field. We ask for the e-mail address to verify if the person is currently a registered user.' The form contains two input fields: 'Designee E-mail Address: \*' and 'Re-enter Designee E-mail Address: \*'. At the bottom left of the form are two buttons: 'Previous' and 'Next'.

Slide notes

The Designee Information page displays.

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The screenshot shows the 'Workers' Compensation Set-Aside Web Portal' interface. At the top left is the CMS logo (Center for Medicare & Medicaid Services). At the top right is the COB&R logo (Coordination of Benefits and Recovery). Below the logos is a navigation bar with links: 'About This Site', 'CMS Links', 'How To...', 'Reference Materials', and 'Contact Us'. A 'Skip Navigation' link is also present. The main heading is 'Designee Information'. Below the heading, there is instructional text: 'Please click the 'Next' button to check the E-Mail Address of a potential designee. To cancel and return to the Designee Listing page, click the 'Previous' button.' Another line of text states: 'An asterisk (\*) indicates a required field. We ask for the e-mail address to verify if the person is currently a registered user.' The form contains two input fields: 'Designee E-mail Address: \*' and 'Re-enter Designee E-mail Address: \*'. At the bottom left of the form are two buttons: 'Previous' and 'Next'.

Slide notes

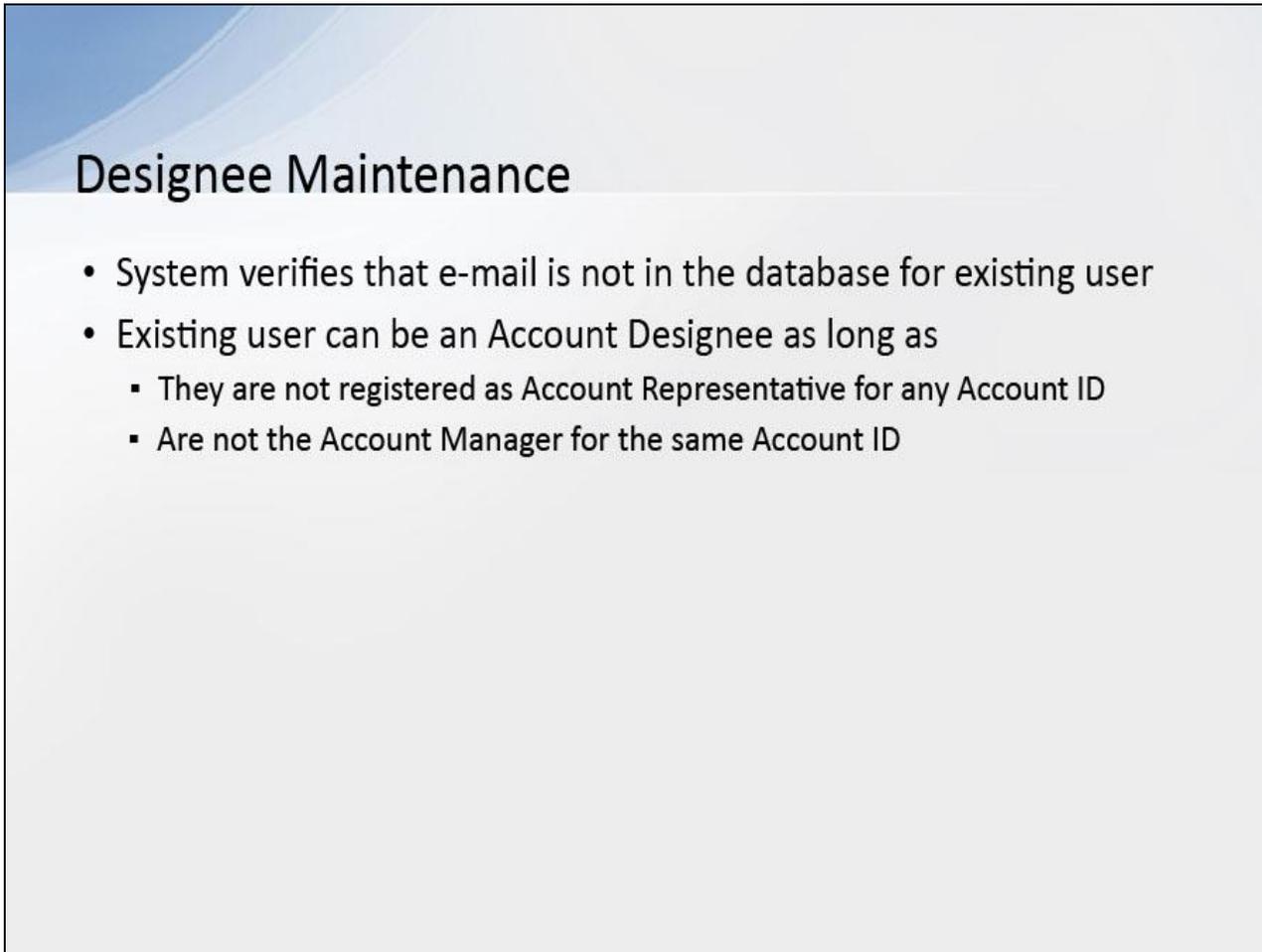
The Account Manager will enter and re-enter the e-mail address of the Account Designee they wish to invite and then click Next to continue.

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The screenshot displays the 'Workers' Compensation Set-Aside Web Portal' interface. At the top left is the CMS logo (Center for Medicare & Medicaid Services), and at the top right is the COB&R logo (Coordination of Benefits and Recovery). A navigation bar below the logos contains links for 'About This Site', 'CMS Links', 'How To...', 'Reference Materials', and 'Contact Us'. A 'Skip Navigation' link is located in the top right corner of the page content. The main heading is 'Designee Information', which is underlined. Below the heading, there is instructional text: 'Please click the 'Next' button to check the E-Mail Address of a potential designee. To cancel and return to the Designee Listing page, click the 'Previous' button.' This is followed by another instruction: 'An asterisk (\*) indicates a required field. We ask for the e-mail address to verify if the person is currently a registered user.' The form contains two input fields: 'Designee E-mail Address: \*' and 'Re-enter Designee E-mail Address: \*'. At the bottom left of the form area are two buttons: 'Previous' and 'Next'.

Slide notes

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The slide features a light blue header with a white curved graphic on the left. The title "Designee Maintenance" is centered in a large, dark font. Below the title is a bulleted list of three items. The first item is a single bullet point. The second item is a bullet point followed by a sub-bulleted list of two items, each preceded by a square bullet point.

## Designee Maintenance

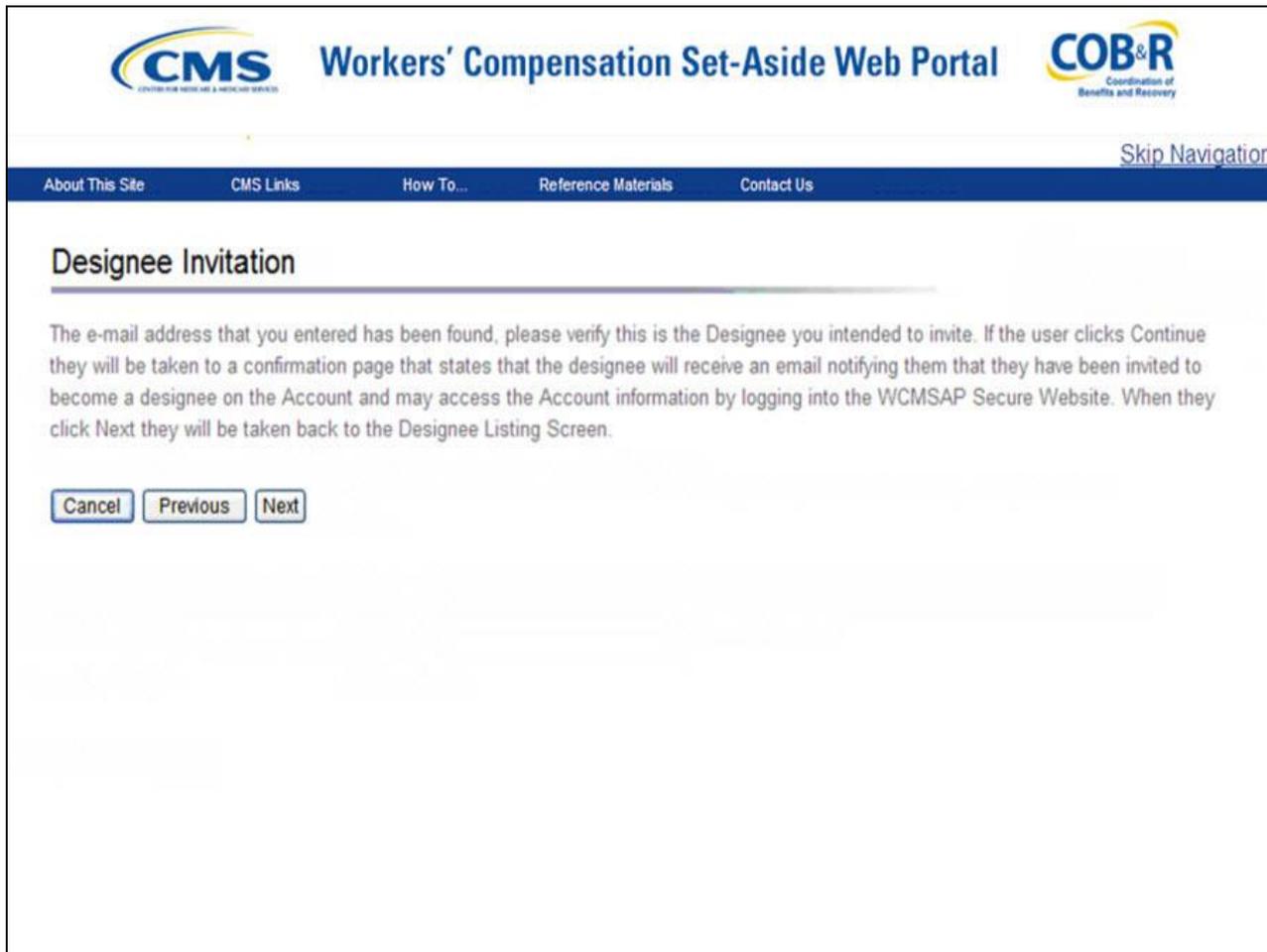
- System verifies that e-mail is not in the database for existing user
- Existing user can be an Account Designee as long as
  - They are not registered as Account Representative for any Account ID
  - Are not the Account Manager for the same Account ID

**Slide notes**

When Next is clicked, the system will verify that the entered e-mail address is not in the database for an existing user.

An existing, registered user can be an Account Designee for your Account ID as long as they are not already registered as an Account Representative for any Account ID, or the Account Manager for the same Account ID.

## Slide 30 - of 54



The screenshot displays the 'Workers' Compensation Set-Aside Web Portal' interface. At the top left is the CMS logo (Center for Medicare & Medicaid Services). At the top right is the COB&R logo (Coordination of Benefits and Recovery). A navigation bar below the logos contains links for 'About This Site', 'CMS Links', 'How To...', 'Reference Materials', and 'Contact Us'. A 'Skip Navigation' link is located in the top right corner. The main content area is titled 'Designee Invitation' and contains the following text: 'The e-mail address that you entered has been found, please verify this is the Designee you intended to invite. If the user clicks Continue they will be taken to a confirmation page that states that the designee will receive an email notifying them that they have been invited to become a designee on the Account and may access the Account information by logging into the WCMSAP Secure Website. When they click Next they will be taken back to the Designee Listing Screen.' Below the text are three buttons: 'Cancel', 'Previous', and 'Next'.

**Slide notes**

If the entered e-mail address is found in the system (i.e., the invited Account Designee is already a registered user), the Designee Invitation page displays.

The Account Manager must verify and confirm that the information entered is for the correct Designee by clicking Next.

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The screenshot shows the 'Workers' Compensation Set-Aside Web Portal' with logos for CMS (Center for Medicare & Medicaid Services) and COB&R (Coordination of Benefits and Recovery). A navigation bar includes links for 'About This Site', 'CMS Links', 'How To...', 'Reference Materials', and 'Contact Us', along with a 'Skip Navigation' link. The main content area is titled 'Designee Confirmation' and contains the following text: 'The following Designee has been successfully added to the account. The designee will receive an email notifying them that they have been invited to become a designee on the Account and may access the Account information by logging into the WCMSAP Secure Website. If the invited Designee is not currently a registered user, please contact the Designee and provide them with passphrase you created; the passphrase is necessary for them to complete registration.' Below this text, the designee details are listed: 'Designee First Name: FIRST', 'Designee Last Name: LAST', and 'Designee Email: AAAAAAAAAA'. At the bottom, there are two buttons: 'Return Home' and 'Next'.

Slide notes

The Designee Confirmation page will display. This page confirms that the invited Designee has been added to the account. The Designee will be sent an e-mail notifying them that they have been added to the Account ID. Click Next to continue.

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**Designee Listing**

This page provides the Designee(s) information for the individuals you have assigned to the account.

An Account Manager can only make changes to a pending Designee. Once the Designee has registered and has a Login ID, the Account Manager cannot make changes to the Designee information other than deleting the Designee from the account.

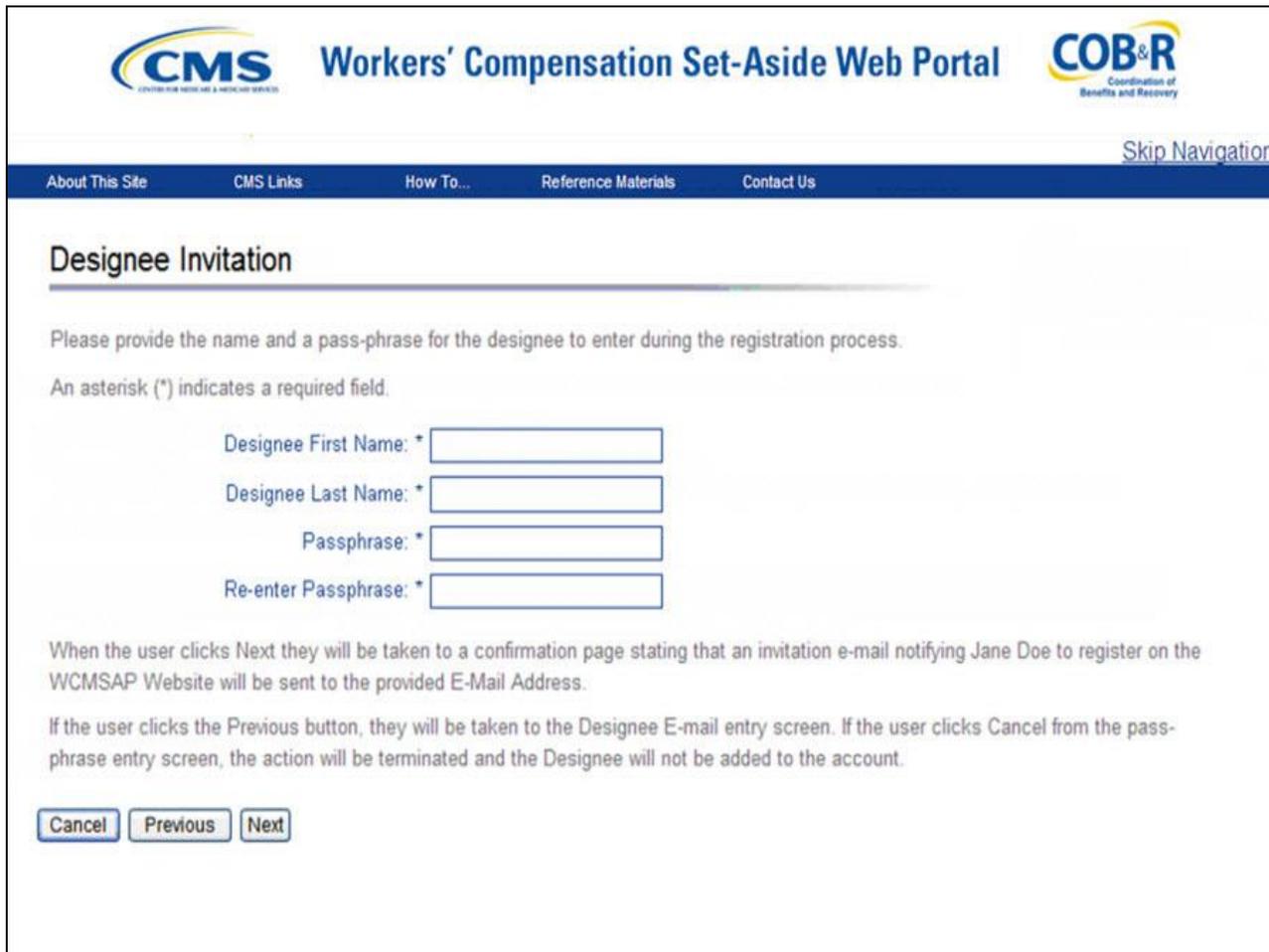
To make changes to the account of a particular Designee listed, select the link on the individual's last name. To delete a Designee select the Delete function to the left of the individual's name. Use the **Add a Designee** function to include an individual as a designee. Individuals added as designees will receive an e-mail notifying them that they have been invited to be a designee for the account.

Delete	Last Name	First Name	E-mail Address	Passphrase	Status
X	LAST	FIRST	AAAAAAAAAAAAA	AAAAAAA	Active
X	<a href="#">LAST</a>	FIRST	AAAAAAAAAAAAA	AAAAAAA	Pending

Slide notes

The Designee Listing page will re-display. The new Designee will be listed with an “Active” Status.

## Slide 33 - of 54



The screenshot displays the 'Designee Invitation' 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 'Designee Invitation' and contains the following text and form fields:

Please provide the name and a pass-phrase for the designee to enter during the registration process.

An asterisk (\*) indicates a required field.

Designee First Name: \*

Designee Last Name: \*

Passphrase: \*

Re-enter Passphrase: \*

When the user clicks Next they will be taken to a confirmation page stating that an invitation e-mail notifying Jane Doe to register on the WCMSAP Website will be sent to the provided E-Mail Address.

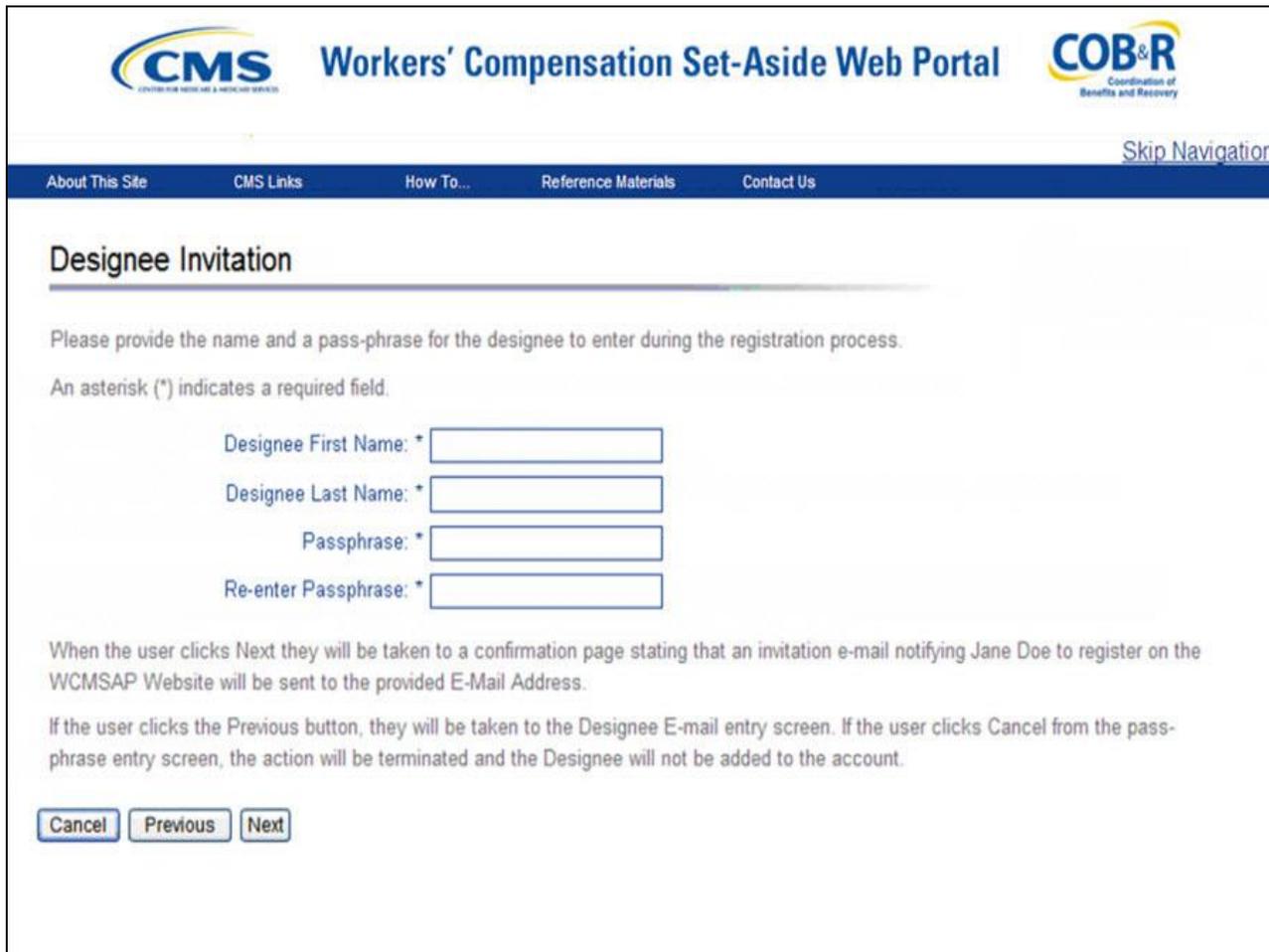
If the user clicks the Previous button, they will be taken to the Designee E-mail entry screen. If the user clicks Cancel from the pass-phrase entry screen, the action will be terminated and the Designee will not be added to the account.

Buttons:

## Slide notes

If the Designee that is being invited is not a registered user (i.e., the entered e-mail address is NOT found in the system), the Designee Invitation page will display.

## Slide 34 - of 54



The screenshot displays the 'Designee Invitation' 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 'Designee Invitation' and contains the following text: 'Please provide the name and a pass-phrase for the designee to enter during the registration process. An asterisk (\*) indicates a required field.' Below this text are four input fields: 'Designee First Name: \*', 'Designee Last Name: \*', 'Passphrase: \*', and 'Re-enter Passphrase: \*'. Each field is followed by a text box. At the bottom of the form, there are three buttons: 'Cancel', 'Previous', and 'Next'. Below the buttons, there is explanatory text: 'When the user clicks Next they will be taken to a confirmation page stating that an invitation e-mail notifying Jane Doe to register on the WCMSAP Website will be sent to the provided E-Mail Address. If the user clicks the Previous button, they will be taken to the Designee E-mail entry screen. If the user clicks Cancel from the pass-phrase entry screen, the action will be terminated and the Designee will not be added to the account.'

**Slide notes**

Unregistered individuals must first be invited to be an Account Designee before they can become an Account Designee.

When the Designee Invitation page displays, the Account Manager must enter the First and Last Name for the individual they are inviting to be an Account Designee, and create a Passphrase (a short, case-sensitive phrase, up to 30 characters). The Passphrase is entered twice.

The Account Manager must contact their Account Designee and provide them with the Passphrase. The Account Designee will need this passphrase in order to register.

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## Designee Maintenance

- Individual being invited as Account Designee will receive an e-mail notifying them of invitation
- Invitation e-mail will come from [cobva@ghimedicare.com](mailto:cobva@ghimedicare.com)
  - Account Manager should inform Designee to allow e-mail deliveries from this address
- When Account Designee receives invitation e-mail, they must click on the link provided and enter Passphrase
- Once registration is complete, they will be able to access this Account ID

### Slide notes

Once the invitation process is complete, the individual being invited as an Account Designee will receive an e-mail notifying them that they have been invited to be an Account Designee for the account.

The invitation e-mail will come from [cobva@ghimedicare.com](mailto:cobva@ghimedicare.com). The Account Manager should inform the Designee to allow e-mail deliveries from this address.

When the Account Designee receives the invitation e-mail, they must click on the link provided in the e-mail and enter the Passphrase that the Account Manager provided them with in order to successfully register for the WCMSAP.

Once the registration has been completed, they will be able to access this Account ID.

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The screenshot shows the 'Workers' Compensation Set-Aside Web Portal' interface. At the top left is the CMS logo (Center for Medicare & Medicaid Services) and at the top right is the COB&R logo (Coordination of Benefits and Recovery). A navigation bar contains links for 'About This Site', 'CMS Links', 'How To...', 'Reference Materials', and 'Contact Us'. A 'Skip Navigation' link is also present. The main heading is 'Designee Invitation'. Below the heading, there is a paragraph: 'Please provide the name and a pass-phrase for the designee to enter during the registration process. An asterisk (\*) indicates a required field.' This is followed by four input fields: 'Designee First Name: \*', 'Designee Last Name: \*', 'Passphrase: \*', and 'Re-enter Passphrase: \*'. Below the fields, there are two paragraphs of explanatory text. The first paragraph states: 'When the user clicks Next they will be taken to a confirmation page stating that an invitation e-mail notifying Jane Doe to register on the WCMSAP Website will be sent to the provided E-Mail Address.' The second paragraph states: 'If the user clicks the Previous button, they will be taken to the Designee E-mail entry screen. If the user clicks Cancel from the pass-phrase entry screen, the action will be terminated and the Designee will not be added to the account.' At the bottom of the form area, there are three buttons: 'Cancel', 'Previous', and 'Next'.

Slide notes

Click Next to continue.

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The screenshot shows the 'Workers' Compensation Set-Aside Web Portal' with logos for CMS (Center for Medicare & Medicaid Services) and COB&R (Coordination of Benefits and Recovery). A navigation bar includes links for 'About This Site', 'CMS Links', 'How To...', 'Reference Materials', and 'Contact Us', along with a 'Skip Navigation' link. The main content area is titled 'Designee Confirmation' and contains the following text: 'The following Designee has been successfully added to the account. The designee will receive an email notifying them that they have been invited to become a designee on the Account and may access the Account information by logging into the WCMSAP Secure Website. If the invited Designee is not currently a registered user, please contact the Designee and provide them with passphrase you created; the passphrase is necessary for them to complete registration.' Below this text, the designee details are listed: 'Designee First Name: FIRST', 'Designee Last Name: LAST', and 'Designee Email: AAAAAAAAAA'. At the bottom, there are two buttons: 'Return Home' and 'Next'.

Slide notes

The Designee Confirmation page will display. Click Next to continue.

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**Designee Listing**

This page provides the Designee(s) information for the individuals you have assigned to the account.

An Account Manager can only make changes to a pending Designee. Once the Designee has registered and has a Login ID, the Account Manager cannot make changes to the Designee information other than deleting the Designee from the account.

To make changes to the account of a particular Designee listed, select the link on the individual's last name. To delete a Designee select the Delete function to the left of the individual's name. Use the **Add a Designee** function to include an individual as a designee. Individuals added as designees will receive an e-mail notifying them that they have been invited to be a designee for the account.

Delete	Last Name	First Name	E-mail Address	Passphrase	Status
X	LAST	FIRST	AAAAAAAAAAAAA	AAAAAAA	Active
X	<a href="#">LAST</a>	FIRST	AAAAAAAAAAAAA	AAAAAAA	Pending

Slide notes

The Designee Listing page re-displays. The new Account Designee is listed with a status of "Pending."

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## Edit Information for an Unregistered Account Designee

- Account Manager can edit personal information for “Pending” Account Designees
  - Have not yet registered on WCMSAP
- Account Manager can only view personal information for “Active” Account Designees
  - Cannot make changes to Account Designee’s information other than deleting them from the account

### Slide notes

An Account Manager can edit personal information for Account Designees in “Pending” status.

Account Designees in “Pending” status have not yet registered on the WCMSAP. Account Managers can only view personal information for Designees in “Active” status.

Once the Designee has registered and has a Login ID, the Account Manager cannot make changes to the Account Designee's information other than deleting the Account Designee from the account.

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**Designee Listing**

This page provides the Designee(s) information for the individuals you have assigned to the account.

An Account Manager can only make changes to a pending Designee. Once the Designee has registered and has a Login ID, the Account Manager cannot make changes to the Designee information other than deleting the Designee from the account.

To make changes to the account of a particular Designee listed, select the link on the individual's last name. To delete a Designee select the Delete function to the left of the individual's name. Use the **Add a Designee** function to include an individual as a designee. Individuals added as designees will receive an e-mail notifying them that they have been invited to be a designee for the account.

Delete	Last Name	First Name	E-mail Address	Passphrase	Status
X	LAST	FIRST	AAAAAAAAAAAAA	AAAAAAA	Active
X	<u>LAST</u>	FIRST	AAAAAAAAAAAAA	AAAAAAA	Pending

Slide notes

To make changes to the account of a particular Account Designee in “Pending” status, click the last name of the Designee whose information you wish to update.

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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](#)

### Update Designee Information

Please click the 'Next' button to check the E-Mail Address of a potential designee. To cancel and return to the Designee Listing page, click the 'Previous' button.

An asterisk (\*) indicates a required field. We ask for the e-mail address to verify if the person is currently a registered user.

First Name: \*

Last Name: \*

E-mail Address: \*

Re-enter E-mail Address: \*

Passphrase: \*

Re-enter Passphrase: \*

Regenerate token. Check this box if another invitation email must be sent to the Designee.

Slide notes

The Update Designee Information page displays, with the Designee’s personal information open for editing. Edit the “Pending” Account Designee’s information as needed. Click Next to continue.

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The screenshot shows the 'Workers' Compensation Set-Aside Web Portal' with logos for CMS (Center for Medicare & Medicaid Services) and COB&R (Coordination of Benefits and Recovery). A navigation bar includes links for 'About This Site', 'CMS Links', 'How To...', 'Reference Materials', and 'Contact Us', along with a 'Skip Navigation' link. The main content area is titled 'Designee Listing' and contains three paragraphs of text explaining the page's purpose and how to manage designees. Below the text is a table with columns for 'Delete', 'Last Name', 'First Name', 'E-mail Address', 'Passphrase', and 'Status'. The table lists two designees: one with status 'Active' and one with status 'Pending'. The 'Last Name' in the 'Pending' row is a blue hyperlink. At the bottom of the table area are two buttons: 'Add a Designee' and 'Return Home'.

Delete	Last Name	First Name	E-mail Address	Passphrase	Status
X	LAST	FIRST	AAAAAAAAAAAAA	AAAAAAA	Active
X	<a href="#">LAST</a>	FIRST	AAAAAAAAAAAAA	AAAAAAA	Pending

Slide notes

The Designee Listing page re-displays and the Designee’s personal information will be updated.

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## Regenerate Invitation E-mail

- E-mail is generated when Account Manager invites Account Designee
  - Includes link for self-registration
- If Account Designee misplaces/deletes e-mail or has not registered within 30 days
  - Account Manager can regenerate e-mail
    - Only for Account Designees in “Pending” status
- Previous token link will not work once new e-mail is generated
- E-mail will come from [cobva@ghimedicare.com](mailto:cobva@ghimedicare.com)

### Slide notes

When the Account Manager invites a person to be an Account Designee, an e-mail is generated and sent to the intended Designee informing them of the invitation, and includes a link for them to access the WCMSAP site and self-register as an Account Designee.

If the intended Designee has misplaced or deleted the invitation e-mail, or if the Account Designee has not registered within 30 days, the Account Manager can regenerate the invitation e-mail, allowing the intended Account Designee to self-register.

The previously-generated link will not work once a new e-mail is generated. Invitation e-mails can only be regenerated for Account Designees in “Pending” status. The e-mail will come from [cobva@ghimedicare.com](mailto:cobva@ghimedicare.com).

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

**Designee Listing**

This page provides the Designee(s) information for the individuals you have assigned to the account.

An Account Manager can only make changes to a pending Designee. Once the Designee has registered and has a Login ID, the Account Manager cannot make changes to the Designee information other than deleting the Designee from the account.

To make changes to the account of a particular Designee listed, select the link on the individual's last name. To delete a Designee select the Delete function to the left of the individual's name. Use the **Add a Designee** function to include an individual as a designee. Individuals added as designees will receive an e-mail notifying them that they have been invited to be a designee for the account.

Delete	Last Name	First Name	E-mail Address	Passphrase	Status
X	LAST	FIRST	AAAAAAAAAAAAA	AAAAAAA	Active
X	<a href="#">LAST</a>	FIRST	AAAAAAAAAAAAA	AAAAAAA	Pending

Slide notes

On the Designee Listing page, click the last name of the Designee that needs the e-mail regenerated.

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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](#)

### Update Designee Information

Please click the 'Next' button to check the E-Mail Address of a potential designee. To cancel and return to the Designee Listing page, click the 'Previous' button.

An asterisk (\*) indicates a required field. We ask for the e-mail address to verify if the person is currently a registered user.

First Name: \*

Last Name: \*

E-mail Address: \*

Re-enter E-mail Address: \*

Passphrase: \*

Re-enter Passphrase: \*

Regenerate token. Check this box if another invitation email must be sent to the Designee.

Slide notes

The Update Designee Information page displays, with the Designee's personal information open for editing.

Slide 46 - of 54

The screenshot shows the 'Workers' Compensation Set-Aside Web Portal' interface. At the top left is the CMS logo (Center for Medicare & Medicaid Services). At the top right is the COB&R logo (Coordination of Benefits and Recovery). Below the logos is a navigation bar with links: 'About This Site', 'CMS Links', 'How To...', 'Reference Materials', and 'Contact Us'. A 'Skip Navigation' link is also present. The main heading is 'Update Designee Information'. Below the heading is a paragraph: 'Please click the 'Next' button to check the E-Mail Address of a potential designee. To cancel and return to the Designee Listing page, click the 'Previous' button.' Another paragraph states: 'An asterisk (\*) indicates a required field. We ask for the e-mail address to verify if the person is currently a registered user.' The form contains six input fields: 'First Name: \*' with 'FIRST', 'Last Name: \*' with 'LAST', 'E-mail Address: \*' with 'AAAAAAAAAA', 'Re-enter E-mail Address: \*' with 'AAAAAAAAAA', 'Passphrase: \*' with 'AAAAAAA', and 'Re-enter Passphrase: \*' with 'AAAAAAA'. Below the fields is a checked checkbox labeled 'Regenerate token. Check this box if another invitation email must be sent to the Designee.' At the bottom are 'Previous' and 'Next' buttons.

Slide notes

Select the Regenerate token check box beneath the Designee’s personal information and then click Next.

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The screenshot shows the 'Workers' Compensation Set-Aside Web Portal' with logos for CMS (Center for Medicare & Medicaid Services) and COB&R (Coordination of Benefits and Recovery). A navigation bar includes links for 'About This Site', 'CMS Links', 'How To...', 'Reference Materials', and 'Contact Us', along with a 'Skip Navigation' link. The main content area is titled 'Designee Listing' and contains the following text:

This page provides the Designee(s) information for the individuals you have assigned to the account.

An Account Manager can only make changes to a pending Designee. Once the Designee has registered and has a Login ID, the Account Manager cannot make changes to the Designee information other than deleting the Designee from the account.

To make changes to the account of a particular Designee listed, select the link on the individual's last name. To delete a Designee select the Delete function to the left of the individual's name. Use the **Add a Designee** function to include an individual as a designee. Individuals added as designees will receive an e-mail notifying them that they have been invited to be a designee for the account.

Delete	Last Name	First Name	E-mail Address	Passphrase	Status
X	LAST	FIRST	AAAAAAAAAAAAA	AAAAAAA	Active
X	<a href="#">LAST</a>	FIRST	AAAAAAAAAAAAA	AAAAAAA	Pending

At the bottom of the table are two buttons: 'Add a Designee' and 'Return Home'.

Slide notes

The Designee Listing page re-displays, with the Designee's information unchanged. However, the system re-generates the invitation e-mail and sends it to the e-mail address registered for the Account Designee.

Slide 48 - of 54

The screenshot shows the 'Workers' Compensation Set-Aside Web Portal' with logos for CMS (Center for Medicare & Medicaid Services) and COB&R (Coordination of Benefits and Recovery). A navigation bar includes links for 'About This Site', 'CMS Links', 'How To...', 'Reference Materials', and 'Contact Us', along with a 'Skip Navigation' link. The main content area is titled 'Designee Listing' and contains three paragraphs of text explaining the designee management process. Below the text is a table with columns for 'Delete', 'Last Name', 'First Name', 'E-mail Address', 'Passphrase', and 'Status'. The table lists two designees: one 'Active' and one 'Pending'. At the bottom of the table area are two buttons: 'Add a Designee' and 'Return Home'.

### Designee Listing

This page provides the Designee(s) information for the individuals you have assigned to the account.

An Account Manager can only make changes to a pending Designee. Once the Designee has registered and has a Login ID, the Account Manager cannot make changes to the Designee information other than deleting the Designee from the account.

To make changes to the account of a particular Designee listed, select the link on the individual's last name. To delete a Designee select the Delete function to the left of the individual's name. Use the **Add a Designee** function to include an individual as a designee. Individuals added as designees will receive an e-mail notifying them that they have been invited to be a designee for the account.

Delete	Last Name	First Name	E-mail Address	Passphrase	Status
X	LAST	FIRST	AAAAAAAAAAAAA	AAAAAAA	Active
X	<a href="#">LAST</a>	FIRST	AAAAAAAAAAAAA	AAAAAAA	Pending

Slide notes

To delete an Account Designee, click the X button next to the individual's name.

Slide 49 - of 54

The screenshot shows the 'Delete Designee Confirmation' page. At the top left is the CMS logo (Center for Medicare & Medicaid Services) and the title 'Workers' Compensation Set-Aside Web Portal'. At the top right is the COB&R logo (Coordination of Benefits and Recovery). A navigation bar below the logos contains 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 'Delete Designee Confirmation'. Below the heading, there are two paragraphs of text: 'Please click on the Continue button to confirm your delete request for this Account Designee. This will remove the individual from this Account ID only. The Designee will no longer have access to this Account ID but will retain access to any other accounts to which they are currently associated.' and 'Click on the Cancel button to return to the Designee Listing page without deleting this Account Designee.' Below the text are three input fields: 'Designee First Name: [redacted]', 'Designee Last Name: [redacted]', and 'Designee E-Mail: [redacted]'. At the bottom left are two buttons: 'Cancel' and 'Continue'. On the right side, there is a 'QUICK HELP' box with a link 'Help About This Page'.

Slide notes

The Delete Designee Confirmation page will display.

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**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](#)

### Delete Designee Confirmation

Please click on the **Continue** button to confirm your delete request for this Account Designee. This will remove the individual from this Account ID only. The Designee will no longer have access to this Account ID but will retain access to any other accounts to which they are currently associated.

Click on the **Cancel** button to return to the Designee Listing page without deleting this Account Designee.

Designee First Name:

Designee Last Name:

Designee E-Mail:

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

Slide notes

If the Account Manager does not want to delete this Account Designee, they will click the Cancel button to return to the Designee Listing page which will show the Account Designee still listed with their status unchanged.

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**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](#)

### Delete Designee Confirmation

Please click on the **Continue** button to confirm your delete request for this Account Designee. This will remove the individual from this Account ID only. The Designee will no longer have access to this Account ID but will retain access to any other accounts to which they are currently associated.

Click on the **Cancel** button to return to the Designee Listing page without deleting this Account Designee.

Designee First Name:

Designee Last Name:

Designee E-Mail:

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

Slide notes

If the Account Manager does want to delete this Account Designee from the WCMSAP account, they will click the Continue button.

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**Designee Listing**

This page provides the Designee(s) information for the individuals you have assigned to the account.

An Account Manager can only make changes to a pending Designee. Once the Designee has registered and has a Login ID, the Account Manager cannot make changes to the Designee information other than deleting the Designee from the account.

To make changes to the account of a particular Designee listed, select the link on the individual's last name. To delete a Designee select the Delete function to the left of the individual's name. Use the **Add a Designee** function to include an individual as a designee. Individuals added as designees will receive an e-mail notifying them that they have been invited to be a designee for the account.

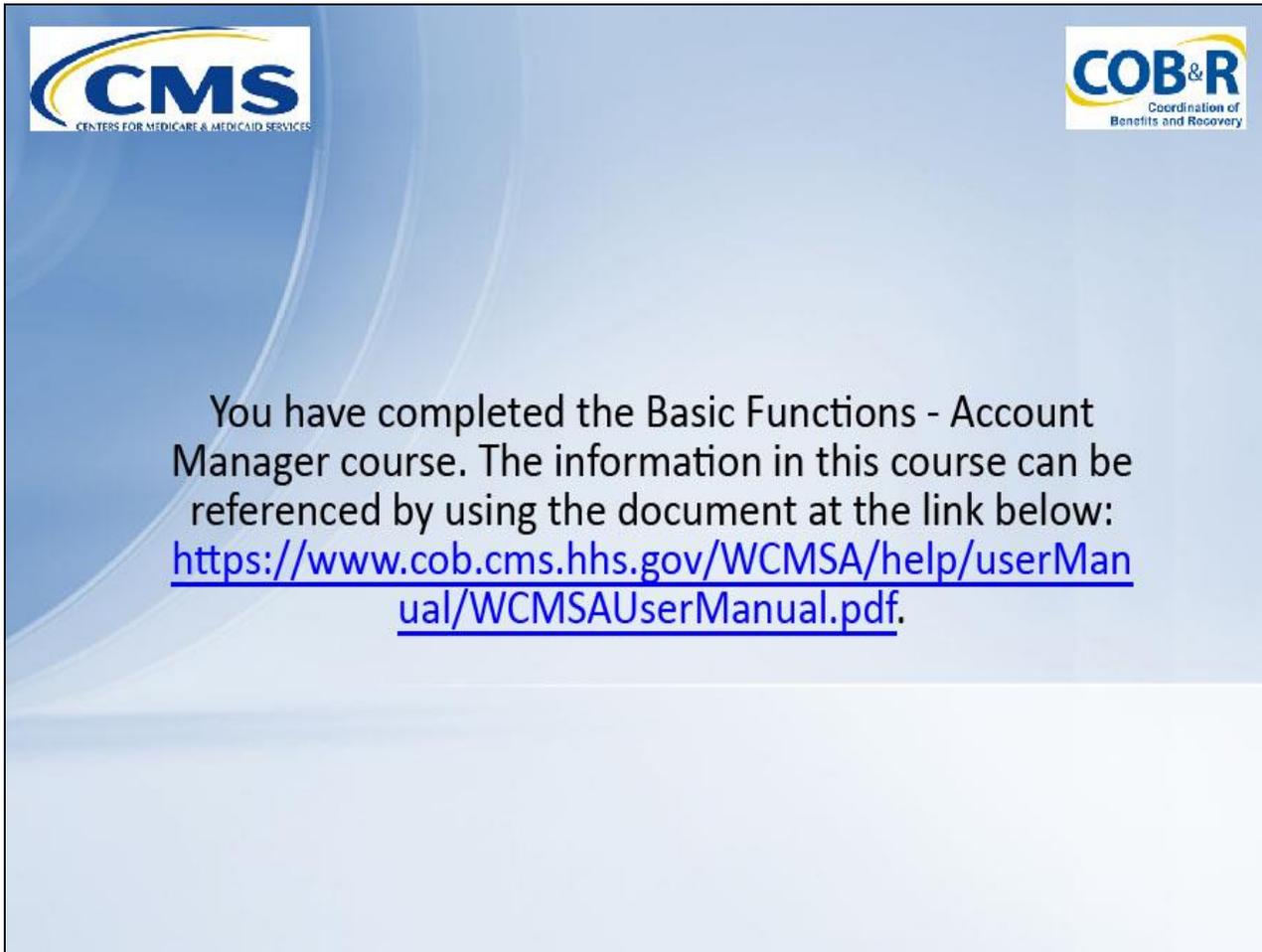
Delete	Last Name	First Name	E-mail Address	Passphrase	Status
X	LAST	FIRST	AAAAAAAAAAAAA	AAAAAAA	Active
X	<a href="#">LAST</a>	FIRST	AAAAAAAAAAAAA	AAAAAAA	Pending

Slide notes

This removes the Account Designee from this Account ID only. The deleted individual will no longer have access to this WCMSAP account.

However, the Account Designee will retain access to any other Account ID they are currently associated with. The Designee Listing page redisplayes without the Account Designee who was just deleted.

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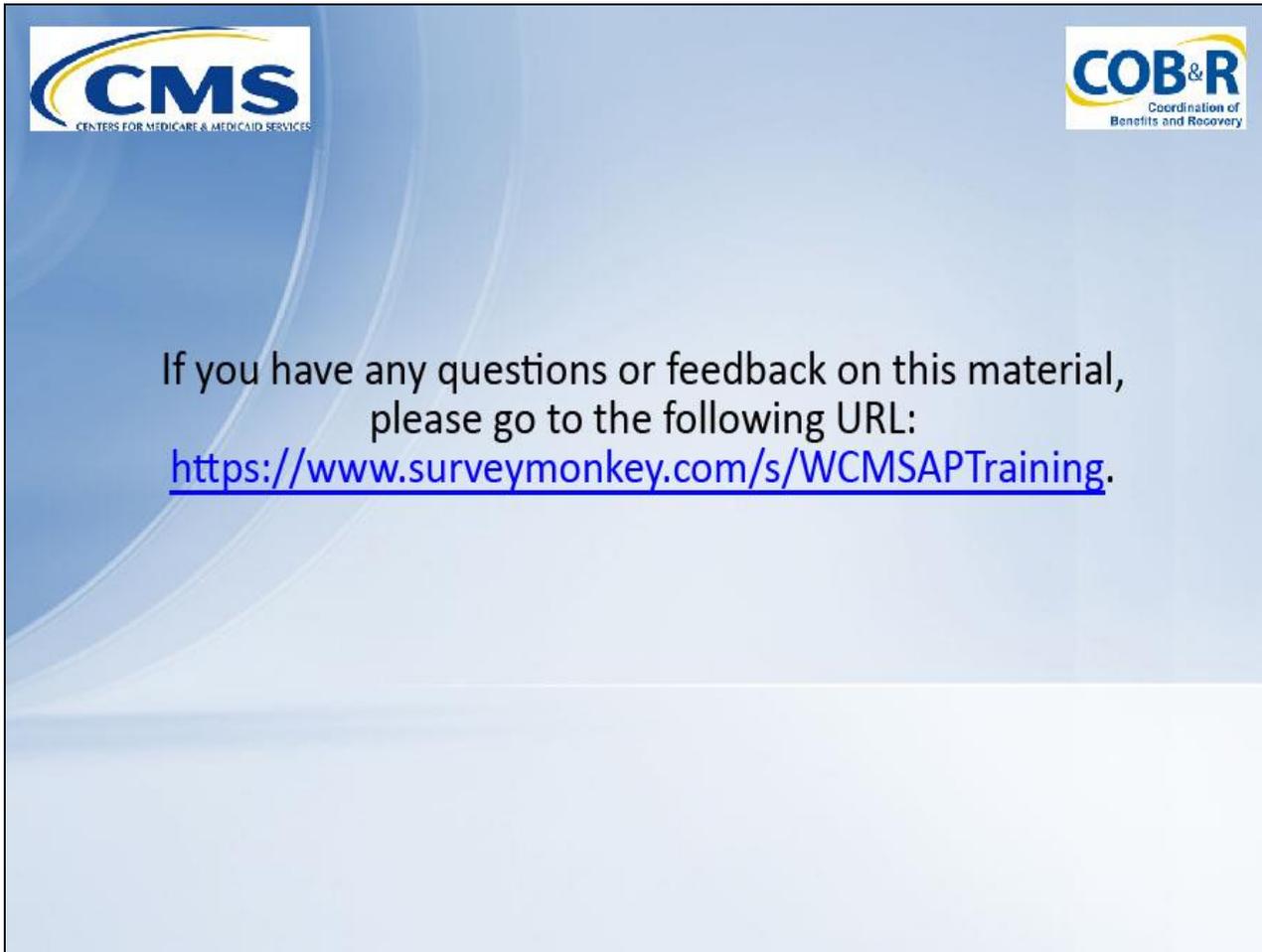
The slide features a light blue background with a subtle wave pattern. In the top left corner is the CMS logo (Centers for Medicare & Medicaid Services). In the top right corner is the COB&R logo (Coordination of Benefits and Recovery). The main text is centered and reads: "You have completed the Basic Functions - Account Manager 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 Basic Functions - Account Manager 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 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>.