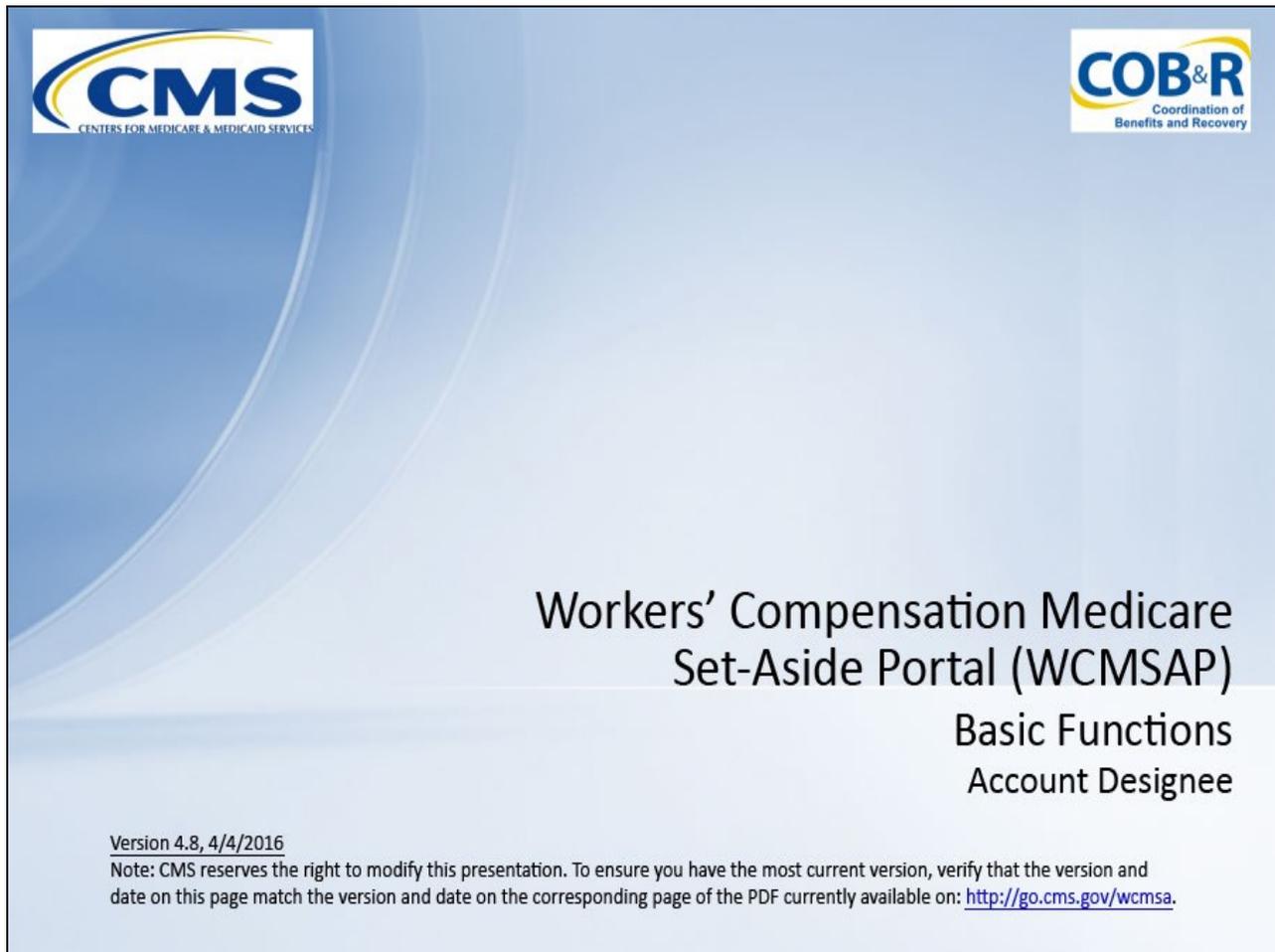


Slide 1 - of 22



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 title is centered on the right side, and the subtitle is below it. At the bottom left, there is version information 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)

Basic Functions Account Designee

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 & Registration - Account Designee 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.

Slide 2 - of 22

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 22

Course Overview

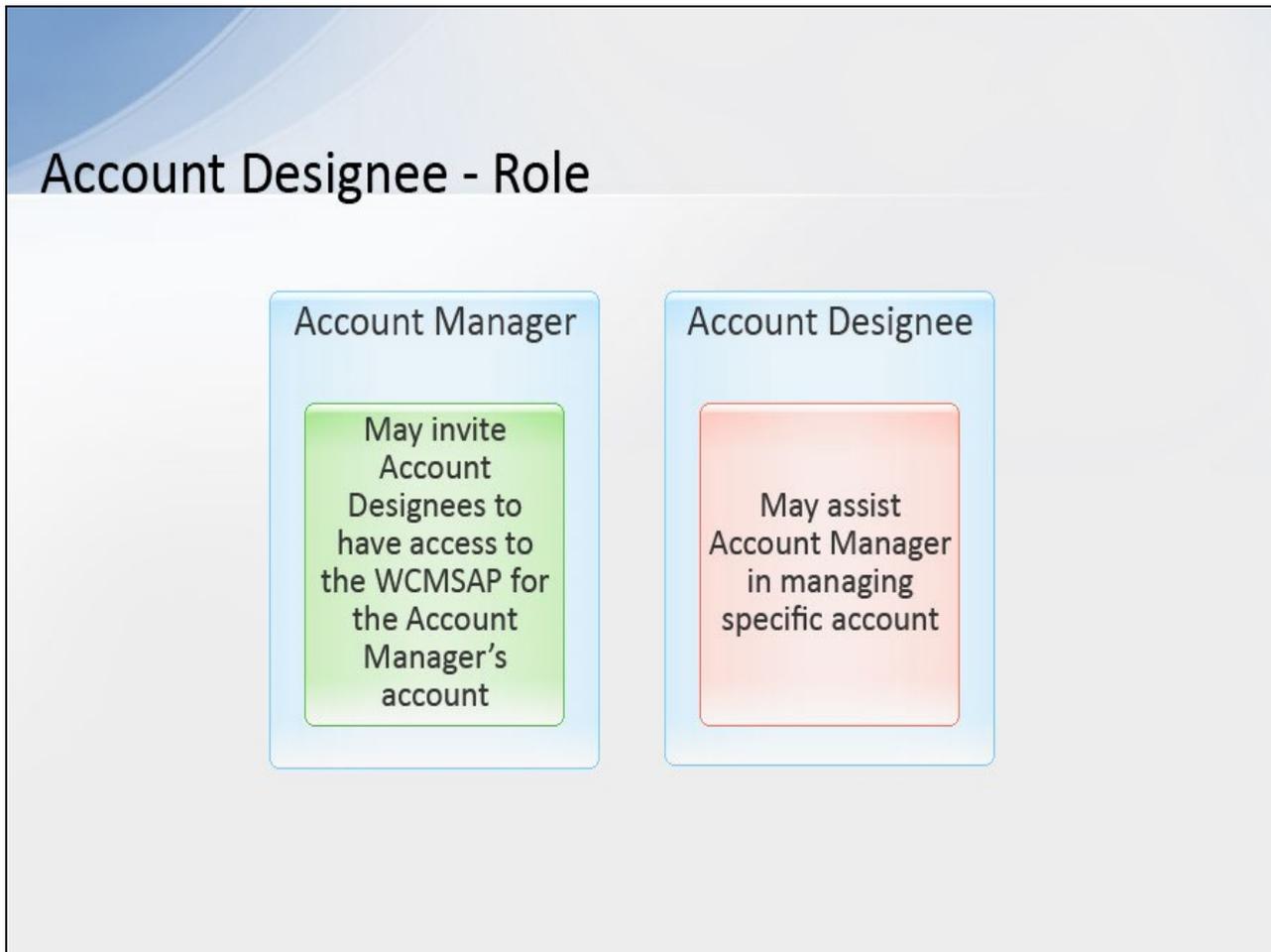
- Account Designee
 - Role
 - Basic Functions
 - Registration



Slide notes

This course will describe the role of the Account Designee, the basic functions available to the Account Designee, and Account Designee registration.

Slide 4 - of 22

**Slide notes**

An Account Manager for Corporate or Representative Account types may invite other individuals, known as Account Designees, to have access to the WCMSAP for the Account Manager's account.

Corporate accounts may have up to 20 Account Designees associated with one WCMSAP account; Representative accounts may have up to 5. Account Designees may assist the Account Manager in managing a specific account.

Note: The Account designee can also be an Account Manager for other accounts. You can also change an Account Designee into an Account Manager by calling your EDI Representative.

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Account Designee - Basic Functions

Account Designee can (to their associated account)

- Be associated with multiple WCMSAP accounts (if invited by Account Manager)
- Change personal information
- Submit new cases
- Perform case lookups and view cases
- Update a case (including appending documentation)
- Replace documentation
- Access alerts
- Update work-in-progress information

Account Designee cannot

- Be an Account Representative for any WCMSAP account
- Be the Account Manager for the same WCMSAP account
- Invite other users to the WCMSAP account
- Update WCMSAP account information

Slide notes

Account Designees can: be associated with multiple WCMSAP accounts but only if invited by the Account Manager for those accounts; change their personal information on the WCMSAP; submit new cases for a given WCMSAP account;

perform case lookups and view cases with which they are associated (cases submitted by the Account Designee or assigned to them by the Account Manager); update (append documentation to) a case that they have been associated with;

replace documentation for cases that they have been associated with; access alerts for cases that they have been associated with; and update work-in-progress case information for cases that they have created or are associated with, as assigned by the Account Manager.

Account Designees cannot: be an Account Representative for any WCMSAP account, be the Account Manager for the same WCMSAP account, invite other users to the WCMSAP account, nor update WCMSAP account information.

Slide 6 - of 22

Account Designee - Registration

Account Designees are required to register once on the WCMSAP and obtain a Login ID and Password

Account Designee will begin by clicking URL in invitation e-mail from cobva@ghimedicare.com

- E-mail contains specific token link
- Token link becomes inactive after 30 days of non-use
- Will also need Passphrase from Account Manager

Slide notes

Account Designees are required to register on the WCMSAP and obtain a Login ID and Password before they can use the system.

The Account Designee will only register once.

Only one Login ID is needed no matter how many account IDs they will ultimately be associated with.

The Account Designee will begin the registration process by clicking on the URL in the invitation e-mail that was sent by the Benefits Coordination & Recovery Center (BCRC).

The e-mail will come from cobva@ghimedicare.com.

Ensure that your spam filter software has been updated to allow receipt from this e-mail address.

The URL in this e-mail contains a specific token which grants access to the registration site.

The token link becomes inactive after 30 days of non-use, so it is imperative that the Account Designee registers as soon as possible after receiving the invitation e-mail.

They will also need the Passphrase that was given to them from the Account Manager which must be entered during the registration process.

Slide 7 - of 22

Workers' Compensation Set-Aside Web Portal

Login Warning [Print this page](#)

UNAUTHORIZED ACCESS TO THIS COMPUTER SYSTEM IS PROHIBITED BY LAW

You are accessing a U.S. Government information system, which includes: (1) this computer, (2) this computer network, (3) all computers connected to this network, and (4) all devices and storage media attached to this network or to a computer on this network. This information system is provided for U.S. Government-authorized use only.

Unauthorized or improper use of this system may result in disciplinary action, as well as civil and criminal penalties.

By using this information system, you understand and consent to the following:

- *You have no reasonable expectation of privacy regarding any communication or data transiting or stored on this information system. At any time, and for any lawful Government purpose, the Government may monitor, intercept, and search and seize any communication or data transiting or stored on this information system.
- *Any communication or data transiting or stored on this information system may be disclosed or used for any lawful Government purpose.

Privacy Act Statement

The collection of this information is authorized by 42 U.S.C. 1395y(b)(5). The information collected will be used to identify and recover past mistaken Medicare primary payments and to prevent Medicare from making mistakes in the future for those Medicare Secondary Payer situations that continue to exist.

Attestation of Information

I have submitted all relevant information obtained and/or have knowledge of regarding this claimant, that was generated at any time on or after the Date of Incident (DOI) for the alleged accident/illness/injury/incident at issue, and has been included as part of this submission of the proposed amount for this WCMSA to the Centers for Medicare & Medicaid Services.

The information provided is complete, truthful, accurate, and meets all requirements set forth to use this process; and, I have read and understand all of the Centers for Medicare & Medicaid Services information at [Workers Compensation Agency Services](#)

LOG OFF IMMEDIATELY if you do not agree to the conditions stated in this warning.

[I Accept](#)
[Decline](#)

¹ A Privacy Act system of records is a group of any records about individuals and under the control of any Federal agency from which information is retrieved by the name or other personal identifier of the individual.

Slide notes

Once the URL in the invitation e-mail has been clicked, the Login Warning page will display, detailing the Data Use Agreement (DUA).

The DUA provides information about WCMSAP security measures including access, penalty and privacy laws.

All users must agree to the terms of this warning each time they access the WCMSAP application.

Slide 8 - of 22

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

[Login Warning](#)

 [Print this page](#)

UNAUTHORIZED ACCESS TO THIS COMPUTER SYSTEM IS PROHIBITED BY LAW

You are accessing a U.S. Government information system, which includes: (1) this computer, (2) this computer network, (3) all computers connected to this network, and (4) all devices and storage media attached to this network or to a computer on this network. This information system is provided for U.S. Government-authorized use only.

Unauthorized or improper use of this system may result in disciplinary action, as well as civil and criminal penalties.

By using this information system, you understand and consent to the following:

- *You have no reasonable expectation of privacy regarding any communication or data transiting or stored on this information system. At any time, and for any lawful Government purpose, the Government may monitor, intercept, and search and seize any communication or data transiting or stored on this information system.
- *Any communication or data transiting or stored on this information system may be disclosed or used for any lawful Government purpose.

Privacy Act Statement

The collection of this information is authorized by 42 U.S.C. 1395y(b)(5). The information collected will be used to identify and recover past mistaken Medicare primary payments and to prevent Medicare from making mistakes in the future for those Medicare Secondary Payer situations that continue to exist.

Attestation of Information

I have submitted all relevant information obtained and/or have knowledge of regarding this claimant, that was generated at any time on or after the Date of Incident (DOI) for the alleged accident/illness/injury/incident at issue, and has been included as part of this submission of the proposed amount for this WCMSA to the Centers for Medicare & Medicaid Services.

The information provided is complete, truthful, accurate, and meets all requirements set forth to use this process; and, I have read and understand all of the Centers for Medicare & Medicaid Services information at [Workers Compensation Agency Services](#)

LOG OFF IMMEDIATELY if you do not agree to the conditions stated in this warning.

[I Accept](#)

[Decline](#)

¹ A Privacy Act system of records is a group of any records about individuals and under the control of any Federal agency from which information is retrieved by the name or other personal identifier of the individual.

Slide notes

Users must review the DUA and click the [I Accept] link at the bottom of the page to continue otherwise they will be denied access to the WCMSAP site and will be unable to register.

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

Designee Registration

You have been assigned as a Designee to the following account:

Corporate Name: AAAAAAAAAAAAAA

Account Manager Information:

FIRST LAST
AAAAAAA
AAAAAAAAAAAA
AAAAAAAAAAAA, AA #####
EIN/TIN: #####
Telephone: (###) ### ####
Email: AAAAAAAAAA

To set up a Login ID for you to act as a Designee, you will need the pass-phrase created by the Account Manager.
If you do not have the pass-phrase, please contact the above Account Manager.

If you have already registered, please visit the Workers' Compensation Medicare Set-Aside Welcome Page at <https://www.cob.cms.hhs.gov/WCMSA> to login.

Enter the passphrase:

Slide notes

If the Account Designee accepts the terms of the Login Warning, the Designee Registration page will display.

The Designee Registration page informs the user that they have been assigned as an Account Designee for the listed Account ID.

Slide 10 - of 22

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

Designee Registration

You have been assigned as a Designee to the following account:

Corporate Name: AAAAAAAAAAAAA

Account Manager Information:

FIRST LAST
AAAAAAA
AAAAAAAAAAAA
AAAAAAAAAAAA, AA #####
EIN/TIN: #####
Telephone: (###) ###-####
Email: AAAAAAAAA

To set up a Login ID for you to act as a Designee, you will need the pass-phrase created by the Account Manager.
If you do not have the pass-phrase, please contact the above Account Manager.

If you have already registered, please visit the Workers' Compensation Medicare Set-Aside Welcome Page at <https://www.cob.cms.hhs.gov/WCMSA> to login.

Enter the passphrase:

Slide notes

The Account Designee will enter the Passphrase given to them by the Account Manager.

Note: The Passphrase is case-sensitive. It must be entered exactly as it was given by the Account Manager.

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To set up a Login ID for you to act as a Designee, you will need the pass-phrase created by the Account Manager. If you do not have the pass-phrase, please contact the above Account Manager.

If you have already registered, please visit the Workers' Compensation Medicare Set-Aside Welcome Page at <https://qua.cob.cms.hhs.gov/WCMSA/> to login.

Enter the passphrase:

You must read the User Agreement provided in the scrolling box. To accept the agreement, click the checkbox. You must accept and agree to the terms of the User Agreement in order to continue through the registration process.

[View and print the agreement below](#)

User Agreement

1. Purpose of Workers' Compensation Medicare Set-Aside Portal (WCMSAP) Sec

The Workers' Compensation Medicare Set-Aside Portal (WCMSAP) will allow for the compensation Medicare Set-Aside arrangement (WCMSA) proposals for future medi introduction of a WCMSAP web portal, WCMSA submitters will receive prompt and c

Please check the following box:

I accept the User Agreement and Privacy Policy above

Slide notes

The Account Designee must review the DUA, check the box to accept the terms, and click Next to continue.

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The screenshot shows the 'Designee Personal Information' registration page. At the top, there are logos for CMS (Center for Medicare & Medicaid Services) and COB&R (Coordination of Benefits and Recovery). A navigation bar includes links for 'About This Site', 'CMS Links', 'How To...', 'Reference Materials', and 'Contact Us', along with a 'Skip Navigation' link. The main heading is 'Designee Personal Information'. A 'QUICK HELP' button with a link to 'Help About This Page' is located on the right. A note states: 'An asterisk (*) indicates a required field.' The form fields are: First Name (*), MI, Last Name (*), E-mail Address (*), Phone (*), Mailing Address (Address Line 1 (*), Address Line 2, City (*), State (*), Zip Code (*)), and a dropdown menu for State. At the bottom left, there are 'Previous' and 'Next' buttons.

Slide notes

The Designee Personal Information page will display.

Slide 13 - of 22

The screenshot shows the 'Designee Personal Information' registration page. 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 'About This Site', 'CMS Links', 'How To...', 'Reference Materials', and 'Contact Us', along with a 'Skip Navigation' link. The main heading is 'Designee Personal Information'. A 'QUICK HELP' button with a link to 'Help About This Page' is located on the right. A note states: 'An asterisk (*) indicates a required field.' The form fields are as follows:

- First Name: * John
- MI: []
- Last Name: * Smith
- E-mail Address: * john.smith@abc.com
- Phone: * 410 - 832 - 8350 - ext 9877
- Mailing Address:
 - Address Line 1: * 200 Test Avenue
 - Address Line 2: Suite 2-B
 - City: * Towson
 - State: * Maryland [dropdown]
 - Zip Code: * 21204 - 3276

At the bottom left, there are 'Previous' and 'Next' buttons.

Slide notes

Enter the required information and click Next to continue. Note: Required fields are denoted by an asterisk (*).

Slide 14 - of 22

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

The security information requested on this page will allow the system to authenticate your identity each time you log on. This will ensure only you are provided access and updating privileges

QUICK HELP
[Help About This Page](#)

Choose your Login ID and password carefully:

- Password must be changed every sixty (60) days.
- Password must consist of at least eight (8) characters.
- Password must contain at least one upper case letter, one lower case letter, one number, and one special character.
- Password must contain a minimum of four (4) changed characters from the previous password.
- Password cannot be changed more than once per day.
- Password must be different from the previous 6 passwords.
- Password cannot contain a reserved word (See Help About This Page for a complete list)

An asterisk (*) indicates a required field.

Login ID *

Password *

Re-enter Password *

The Security Questions allow you to regain account access if you forget your password. Please note the answers you provide to these questions should be actual answers and not hints for your password.

Choose Security Questions and Provide Answers

Security Question 1 *

Answer 1 *

Security Question 2 *

Answer 2 *

Slide notes

The Designee Login Information page will display, where the Account Designee must set up a Login ID and Password and also select two Security Questions.

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Designee Login Information

- Password
 - Must be changed every 60 days
 - Must be 8 characters in length
 - Must contain a mix of upper case letters, lower case letters, and numbers and a special character
 - Cannot be changed more than once per day
 - Does not contain 4 consecutive characters from the previous password
 - Must be different from the last 6 passwords
 - Cannot contain reserved words

Slide notes

When choosing a Password, ensure that: Login IDs are 7 characters; Login IDs are in the format of AA999AA (first two alphabetic, next three numeric, last two alphabetic);

password is changed every 60 days; is 8 characters in length; contains at least one upper case letter, one lower case letter, one number, and one special character; is not changed more than once per day;

does not contain 4 consecutive characters from the previous password; is different from the last 6 Passwords; and does not contain a reserved word. Please see the WCMSAP User Guide for the Reserved Words List.

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An asterisk (*) indicates a required field.

Login ID *

Password *

Re-enter Password *

The Security Questions allow you to regain account access if you forget your password. Please note the answers you provide to these questions should be actual answers and not hints for your password.

Choose Security Questions and Provide Answers

Security Question 1 * Please Select

Answer 1 *

Security Question 2 * Please Select

Answer 2 *

Slide notes

The Security Questions will be used to assist the Account Designee in regaining account access if they forget their password.

The answers provided to these questions should be actual answers and not hints for the password.

Enter all required information and then click Next to continue.

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The screenshot displays the 'Designee Summary' page of the Workers' Compensation Set-Aside Web Portal. The page header includes the CMS logo (Center for Medicare & Medicaid Services) and the COB&R logo (Coordination of Benefits and Recovery). A navigation bar contains links for 'About This Site', 'CMS Links', 'How To...', 'Reference Materials', and 'Contact Us', along with a 'Skip Navigation' link. The main content area is titled 'Designee Summary' and contains a paragraph of instructions: 'Please review your personal and login Information. If you need to change the information, click the 'Edit' button. If you are satisfied with the information click the 'Submit Registration' button to submit your information. Click 'Cancel' to cancel the setup process, all data will be lost. Please print this page for your records.' To the right of this text is a 'QUICK HELP' box with a link to 'Help About This Page'. Below the instructions are two sections: 'Personal Information' and 'Login ID', each with an 'Edit' button. The 'Personal Information' section includes fields for 'First Name', 'MI', 'Last Name', 'E-Mail Address', and 'Phone' (with an 'ext.' field). The 'Login ID' section includes a 'Login ID' field. Below these is the 'Mailing Address' section with fields for 'Address Line 1', 'Address Line 2', 'City', 'State', and 'Zip Code'. At the bottom of the form are three buttons: 'Previous', 'Submit Registration', and 'Cancel'.

Slide notes

The Designee Summary page will display.

This page provides a summary of the information that has been entered during the Account Designee registration process.

Review this page for accuracy and completeness.

To make any corrections, click the Edit button next to the section that requires updates.

This action will return the user to the corresponding page.

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The screenshot shows the 'Designee Personal Information' registration page. 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 'About This Site', 'CMS Links', 'How To...', 'Reference Materials', and 'Contact Us', along with a 'Skip Navigation' link. The main heading is 'Designee Personal Information'. A 'QUICK HELP' button with a link to 'Help About This Page' is located on the right. A note states: 'An asterisk (*) indicates a required field.' The form fields are as follows:

- First Name: * John
- MI: []
- Last Name: * Smith
- E-mail Address: * jsmith@abc.com
- Phone: * 410 - 832 - 8350 - ext 9877
- Mailing Address:
 - Address Line 1: * 200 Test Avenue
 - Address Line 2: Suite 2-B
 - City: * Towson
 - State: * Maryland
 - Zip Code: * 21204 - 3276

At the bottom left, there are 'Previous' and 'Next' buttons.

Slide notes

Change any of the information as needed and click Next to navigate back to the Designee Summary page.

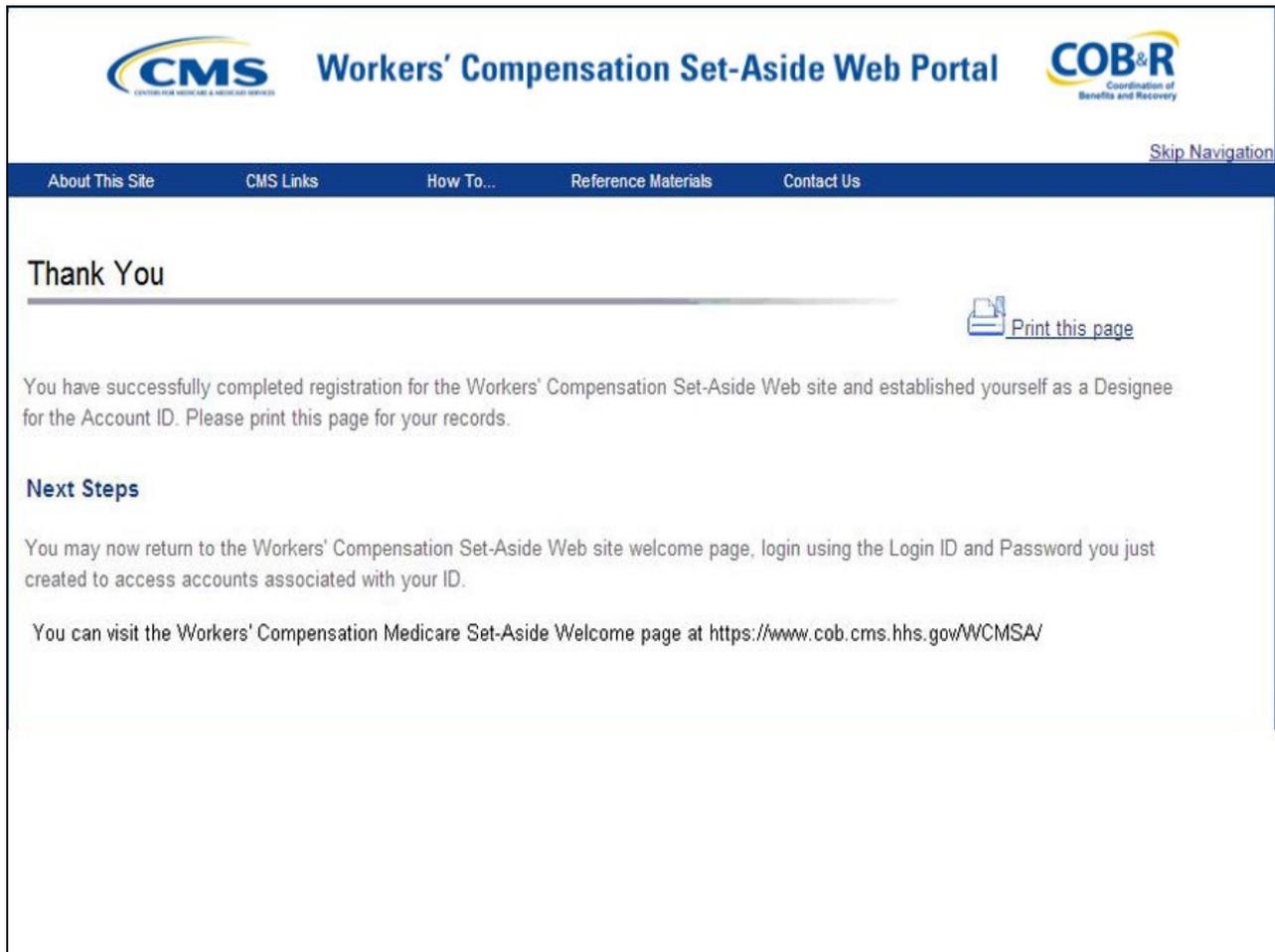
Slide 19 - of 22

The screenshot displays the 'Designee Summary' page of the Workers' Compensation Set-Aside Web Portal. The page header includes the CMS logo (Center for Medicare & Medicaid Services) and the COB&R logo (Coordination of Benefits and Recovery). A navigation bar contains links for 'About This Site', 'CMS Links', 'How To...', 'Reference Materials', and 'Contact Us', along with a 'Skip Navigation' link. The main content area is titled 'Designee Summary' and contains a paragraph of instructions: 'Please review your personal and login Information. If you need to change the information, click the 'Edit' button. If you are satisfied with the information click the 'Submit Registration' button to submit your information. Click 'Cancel' to cancel the setup process, all data will be lost. Please print this page for your records.' To the right of this text is a 'QUICK HELP' box with a link to 'Help About This Page'. Below the instructions are two sections: 'Personal Information' and 'Login ID', each with an 'Edit' button. The 'Personal Information' section includes fields for 'First Name', 'MI', 'Last Name', 'E-Mail Address', and 'Phone' (with an 'ext.' field). The 'Login ID' section has a 'Login ID' field. Below these is the 'Mailing Address' section with fields for 'Address Line 1', 'Address Line 2', 'City', 'State', and 'Zip Code'. At the bottom of the form are three buttons: 'Previous', 'Submit Registration', and 'Cancel'.

Slide notes

When all information has been verified for accuracy and completeness, click Submit Registration.

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The screenshot shows the 'Thank You' page of the Workers' Compensation Set-Aside Web Portal. At the top left is the CMS logo (Center for Medicare & Medicaid Services). In the center is the title 'Workers' Compensation Set-Aside Web Portal'. At the top right is the COB&R logo (Coordination of Benefits and Recovery). Below the title is a navigation bar with links: '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 large 'Thank You' heading, a horizontal line, and a 'Print this page' button with a printer icon. Below this, a message states: 'You have successfully completed registration for the Workers' Compensation Set-Aside Web site and established yourself as a Designee for the Account ID. Please print this page for your records.' A 'Next Steps' section follows, advising the user to return to the welcome page and login with their ID and password. A link is provided: 'You can visit the Workers' Compensation Medicare Set-Aside Welcome page at <https://www.cob.cms.hhs.gov/WCMSA/>'.

Slide notes

The Thank You page will display stating that the Account Designee has been successfully registered on the WCMSAP.

Click the Workers' Compensation Medicare Set-Aside Welcome page link to go to the WCMSAP Welcome page to log in to the site and manage account information.

Slide 21 - of 22



You have completed the WCSMAP Basic Functions and Registration - Account Designee 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 WCSMAP Basic Functions and Registration - Account Designee 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: <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>.