

## Slide 1 - of 30



**Workers' Compensation Medicare Set-Aside  
Portal (WCMSAP)  
Registration Process  
Self Submitter**

Version 4.8, 4/4/2016  
Note: CMS reserves the right to modify this presentation. To ensure you have the most current version, verify that the version and date on this page match the version and date on the corresponding page of the PDF currently available on: <http://go.cms.gov/wcmsa>.

**Slide notes**

Welcome to the Workers' Compensation Medicare Set-Aside Portal (WCMSAP) Registration Process course.

This module is intended for those individuals who will register for a self submitter account.

A self submitter account indicates that the submitter will be submitting a case for themselves.

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

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

Additionally, you can view the narration by clicking the Closed Captioning [CC] button in the lower right hand corner of the screen.

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## Disclaimer

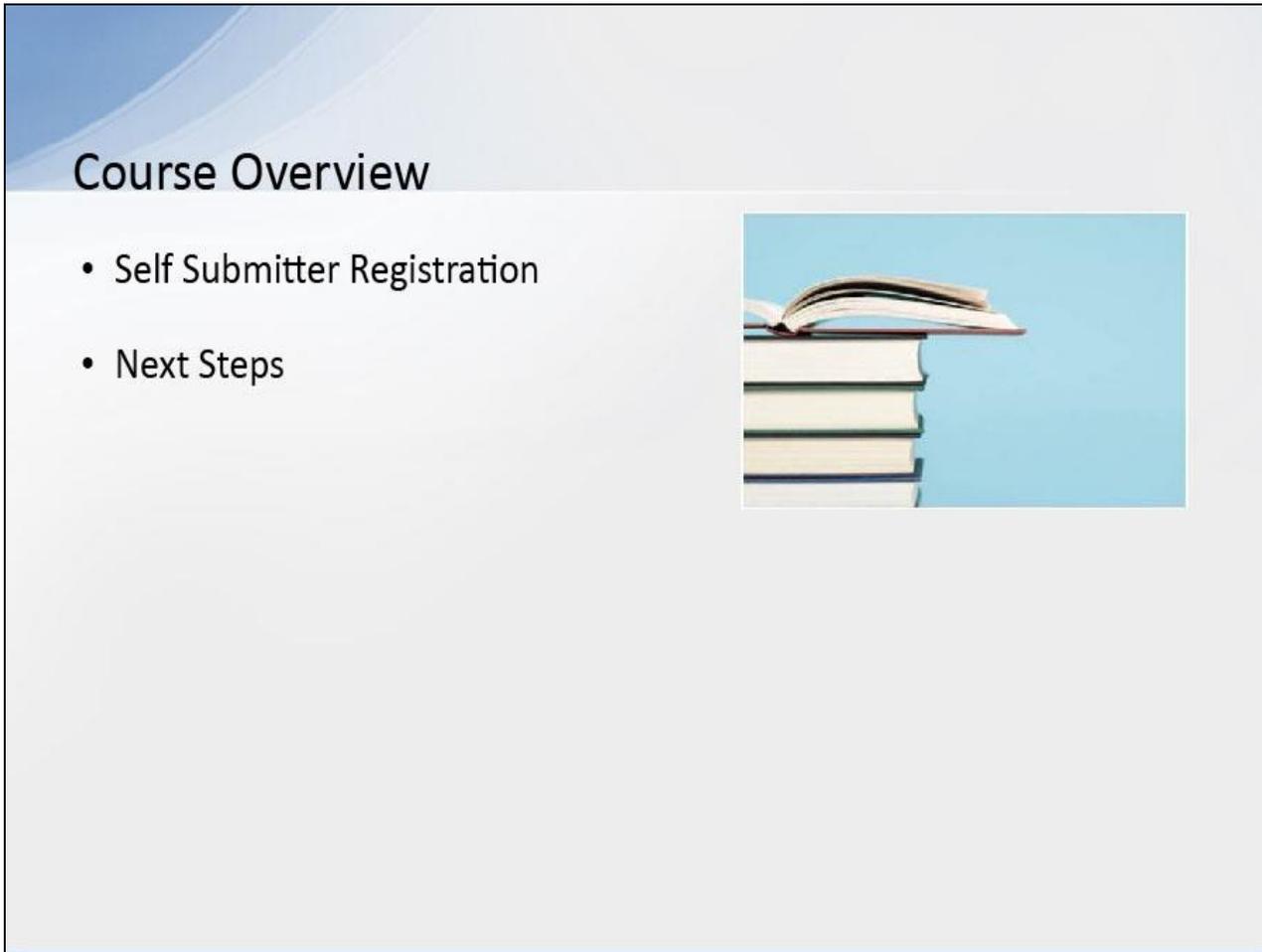
While all information in this document is believed to be correct at the time of writing, this Computer Based Training (CBT) is for educational purposes only and does not constitute official Centers for Medicare & Medicaid Services (CMS) instructions for the WCMSAP. All affected entities are responsible 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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The slide features a light blue header with the title "Course Overview". Below the title is a bulleted list of two items: "Self Submitter Registration" and "Next Steps". To the right of the list is a photograph of a stack of four books, with the top book open, set against a light blue background.

**Slide notes**

This course will provide instruction on how to complete a self submitter registration on the WCMSAP and the steps to follow once the registration has been submitted.

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Slide notes

All users must register for a Web portal account on the WCMSAP URL.

To create your self submitter account, you must go to the WCMSAP URL at <https://www.cob.cms.hhs.gov/WCMSA> to begin the registration process.

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## Workers' Compensation Set-Aside Web Portal



Login Warning
 [Print this page](#)

**UNAUTHORIZED ACCESS TO THIS COMPUTER SYSTEM IS PROHIBITED BY LAW**

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

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

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

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

\*Any communication or data transiting or stored on this information system may be disclosed or used for any lawful Government purpose.

**Privacy Act Statement**

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

**Attestation of Information**

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

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

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

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

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

## Slide notes

Each time you visit the WCMSAP Web site, the Login Warning page will display the Data Use Agreement (DUA). The DUA provides information about WCMSAP security measures including access, penalty and privacy laws. You must agree to the terms of this warning each time you access the WCMSAP application.

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

Login Warning [Print this page](#)

**UNAUTHORIZED ACCESS TO THIS COMPUTER SYSTEM IS PROHIBITED BY LAW**

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

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\*Any communication or data transiting or stored on this information system may be disclosed or used for any lawful Government purpose.

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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](#)

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## Slide notes

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

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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](#)

## 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](#)

Slide notes

Once you have clicked the [I Accept] link, the Login (Welcome) page will display. Here you will find various menu options.

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The screenshot shows the homepage of the Workers' Compensation Set-Aside Web Portal. At the top left is the CMS logo (Center for Medicare & Medicaid Services). In the center is the title "Workers' Compensation Set-Aside Web Portal". At the top right is the COB&R logo (Coordination of Benefits and Recovery). Below the 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 content area starts with a "Welcome to the WCMSAP" heading. Below this is a paragraph explaining the site's purpose for attorneys, Medicare beneficiaries, claimants, insurance carriers, and WCMSA vendors. A link to a Medicare.gov page is provided. To the right is a "Sign into your account" box with fields for "User Name:" and "Password:", each with a "Forgot" link and "Login" and "Clear" buttons. Below the welcome message is a "WCMSAP Message" section with "Testing Message Text". The "GETTING STARTED" section follows, with a note to refer to the "How To" menu. Two large buttons are shown: "STEP 1 New Registration" and "STEP 2 Account Setup" (with a note "(Account ID and PIN required)").

Slide notes

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

[Skip Navigation](#)

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

## Welcome to the WCMSAP

This site provides an interface for entry of Workers' Compensation Medicare Set-Aside Arrangements (WCMSA) proposals. Attorneys, Medicare beneficiaries, claimants, insurance carriers and WCMSA vendors may use this site to enter the case information directly. The site also provides attorneys, Medicare beneficiaries, claimants, insurance carriers, and WCMSA vendors with the ability to track their submitted cases and the statuses without inquiry to the Benefits Coordination & Recovery Center (BCRC) or the Centers for Medicare & Medicaid Services (CMS).

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**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](#)

Slide notes

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

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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](#)

## Welcome to the WCMSAP

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**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](#)

Slide notes

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

Getting Started, Requesting your Login ID, Requesting your Password, Changing your Password, Resetting your PIN, Changing your Account Representative, Changing your Account Manager, and Inviting Account Designees.

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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](#)

## Welcome to the WCMSAP

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**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](#)

Slide notes

"Reference Materials" displays a link to the WCMSAP User Guide.

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

**Sign into your account**

User Name:

[Forgot ID](#)

Password:

[Forgot Password](#)

**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)

Slide notes

"Contact Us" displays the following message which provides information on how to contact the EDI Department

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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](#)

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For information about the availability of auxiliary aids and services, please visit: <http://www.medicare.gov/about-us/nondiscrimination/nondiscrimination-notice.html>

### WCMSAP Message

Testing Message Text

### GETTING STARTED

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

**STEP 1** **STEP 2**

**New Registration** → **Account Setup** →  
(Account ID and PIN required)

#### Sign into your account

User Name:

[Forgot ID](#)

Password:

[Forgot Password](#)

Slide notes

The first step in the WCMSAP registration process is Account Registration.

To begin this process, click New Registration.

## Slide 14 - of 30

The screenshot shows the 'Workers' Compensation Set-Aside Web Portal' registration page. 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', with a 'Skip Navigation' link on the right. The main heading is 'Select Account Type'. Below it, a prompt asks the user to select the account type for registration. Three radio button options are listed: 'Corporate', 'Representative', and 'Self', each with a descriptive paragraph. A 'QUICK HELP' box with a 'Help About This Page' link is on the right. At the bottom are 'Previous' and 'Next' buttons, and a footer with 'Privacy Policy' and 'User Agreement' links.

**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](#)

## Select Account Type

Please select the type of account for which you are registering:

**Corporate**

A corporate account type indicates that the submitter is registering as a corporate entity with an Employer Identification Number (EIN) and will be regularly submitting WCMSA requests.

**Representative**

A representative account type is for non-corporate WCMSA submitters. These submitters do not have an EIN, but will be submitting multiple cases.

**Self**

Self submitters are Medicare beneficiaries or future Medicare beneficiaries (claimant) submitting a case on their own behalf. The registrant must be a Medicare beneficiary or claimant and may only submit cases for themselves.

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

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

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

**Slide notes**

The Select Account Type page displays.

This page describes the differences between each account type.

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The screenshot shows the 'Workers' Compensation Set-Aside Web Portal' registration page. 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', with a 'Skip Navigation' link on the right. The main heading is 'Select Account Type'. Below it, a prompt asks the user to select the account type. Three radio button options are listed: 'Corporate', 'Representative', and 'Self'. Each option has a descriptive paragraph. The 'Self' option is highlighted. A 'QUICK HELP' box with a 'Help About This Page' link is on the right. At the bottom, there are 'Previous' and 'Next' buttons and a footer with 'Privacy Policy' and 'User Agreement' links.

Slide notes

To register as a self submitter, select the Self button and then click Next.

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The screenshot displays the 'Workers' Compensation Set-Aside Web Portal' interface. 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 Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Logoff. The main content area is titled 'Case Information' and features a series of tabs: Beneficiary/Claimant\*, Diagnosis Codes\*, Prescriptions\*, WC Carrier\*, Employer\*, Attorney, Notes, Documents\*, and Summary. The 'Beneficiary/Claimant Information' section contains a form with the following fields: Last Name, First Name, MI, Beneficiary HICN (with a superscripted asterisk and a sample value '\*\*\*\*\*A'), Beneficiary/Claimant SSN, Beneficiary/Claimant Date of Birth, Gender, Address Line 1, Address Line 2, City, State of Residence (dropdown menu), Zip Code, Phone, State where injury occurred (dropdown menu), and Submitter Type (dropdown menu). A 'QUICK HELP' button with a 'Help About This Page' link is located on the right. At the bottom of the form are three buttons: 'Next', 'Save Work-In-Progress', and 'Case Summary', along with a 'Cancel Case Creation' button.

Slide notes

After the Self account type is selected, you will be directed to the Beneficiary/Claimant Information page.

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The screenshot displays the 'Workers' Compensation Set-Aside Web Portal' interface. 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 Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Logoff. Below this is a 'Skip Navigation' link. The main content area is titled 'Case Information' and features a series of tabs: Beneficiary/Claimant\*, Diagnosis Codes\*, Prescriptions\*, WC Carrier\*, Employer\*, Attorney, Notes, Documents\*, and Summary. The 'Beneficiary/Claimant Information' section is active, showing a form with various fields. A note states: 'A superscript (¹) indicates a field is required for submission.' The form fields include: Last Name, First Name, MI, Beneficiary HICN (with a superscript ¹ and a placeholder '\*\*\*\*\*A'), Beneficiary/Claimant SSN, Beneficiary/Claimant Date of Birth, Gender, Address Line 1 (with a superscript ¹), Address Line 2, City (with a superscript ¹), State of Residence (with a superscript ¹ and a dropdown menu), Zip Code (with a superscript ¹), Phone, State where injury occurred (with a superscript ¹ and a dropdown menu), and Submitter Type (with a superscript ¹ and a dropdown menu). A 'QUICK HELP' button is located on the right side of the form, with a link to 'Help About This Page'. At the bottom of the form, there are three buttons: 'Next', 'Save Work-In-Progress', and 'Case Summary', along with a 'Cancel Case Creation' button.

Slide notes

Complete this page for the beneficiary or claimant associated with the case that will be created using this Account ID.

The address entered will be used to send the Profile Report and any correspondence from the BCRC regarding this Account ID.

Fields marked with an asterisk (\*) are required.

Once this page is complete, click Next.

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## Beneficiary Information Validation

- System validates each field on the registration page
- If errors are found
  - System displays message indicating errors found
  - Cursor is placed on the first field that generates an error
  - User must correct the error before being allowed to proceed
- Once the data is corrected, the system revalidates the data

### Slide notes

The system will validate each field on the registration page for accuracy and completeness.

If errors are found, the system will display applicable error messages on the screen indicating what error condition(s) was found.

When errors are discovered, the cursor will be placed on the first field that generates an error condition.

This will either be a required field that is missing data or a field that contains a data error.

The user must correct the error before the system will allow the user to proceed to the next page.

Once the data has been corrected, the system will revalidate all data that has been entered.

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The screenshot shows the 'Registration Summary' page of the CMS Workers' Compensation Set-Aside Web Portal. The page header includes the CMS logo, the portal title, and the COB&R logo. A navigation bar 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 content area is titled 'Registration Summary' and includes a 'Print this page' button. The summary is divided into two main sections: 'Representative Information' and 'Beneficiary Information', each with an 'Edit' button. The Representative Information section includes fields for Account Type (Representative), First Name (FIRST MI: M), Last Name (LAST), SSN (### ## ####), E-Mail Address (AAAAAAAAAAAA), Phone (### -###-#### ext. ####), Fax (### -###-####), and Representative Mailing Address (Address Line 1: AAAAAAAAAAAAA, Address Line 2: AAAAAAAAAAAAA, City: AAAAAAAAAAAAA, State: AAAAAAAAAAAAA, Zip Code: ##### - ####). The Beneficiary Information section includes fields for Last Name (LAST), First Initial (F), HICN (#####A), Date of Birth (MONTH ##, ####), and Gender (Male). At the bottom of the form are 'Previous' and 'Submit Registration' buttons.

Slide notes

As long as all information was entered correctly on the Beneficiary/Claimant Information page, the Registration Summary page will display next.

This page lists all the information that was previously entered.

All information should be reviewed and verified before continuing.

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



Coordination of  
Benefits and Recovery

[Skip Navigation](#)

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

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### Registration Summary

 [Print this page](#)

Account Type: Representative

<b>Representative Information</b> <input type="button" value="Edit"/>	<b>Beneficiary Information</b> <input type="button" value="Edit"/>
First Name:FIRST MI: M Last Name: LAST	Last Name:LAST First Initial F
SSN: ### ## ####	HICN: #####A
E-Mail Address: AAAAAAAAAAAAA	Date of Birth: MONTH ##, ####
Phone ### - ### - #### ext. ####	Gender: Male
Fax: ### - ### - ####	

**Representative Mailing Address:**

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

Slide notes

This page may be printed for your records.

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The screenshot shows the 'Registration Summary' page of the CMS Workers' Compensation Set-Aside Web Portal. The page includes a navigation bar with 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 'Registration Summary' and features a 'Print this page' button. The registration details are organized into sections, each with an 'Edit' button:

- Account Type:** Representative (Edit)
- Representative Information:** (Edit)
  - First Name: FIRST MI: M Last Name: LAST
  - SSN: ### ## ####
  - E-Mail Address: AAAAAAAAAAAAAA
  - Phone ### - ## - #### ext. ####
  - Fax: ### - ## - ####
- Beneficiary Information:** (Edit)
  - Last Name: LAST First Initial F
  - HICN: #####A
  - Date of Birth: MONTH ##, ####
  - Gender: Male
- Representative Mailing Address:**
  - Address Line 1: AAAAAAAAAAAAAA
  - Address Line 2: AAAAAAAAAAAAAA
  - City: AAAAAAAAAAAAAA
  - State: AAAAAAAAAAAAAA
  - Zip Code: ##### - ####

At the bottom of the form, there are two buttons: 'Previous' and 'Submit Registration'.

Slide notes

To make any corrections, click the Edit button next to the applicable section. Once clicked, the system will display that information entry page.

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The screenshot displays the 'Workers' Compensation Set-Aside Web Portal' interface. 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 Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Logoff. The main content area is titled 'Case Information' and features a series of tabs: Beneficiary/Claimant\*, Diagnosis Codes\*, Prescriptions\*, WC Carrier\*, Employer\*, Attorney, Notes, Documents\*, and Summary. The 'Beneficiary/Claimant Information' section contains a form with the following fields: Last Name, First Name, MI, Beneficiary HICN (with a superscripted asterisk and a pre-filled 'A'), Beneficiary/Claimant SSN, Beneficiary/Claimant Date of Birth, Gender, Address Line 1, Address Line 2, City, State of Residence (dropdown), Zip Code, Phone, State where injury occurred (dropdown), and Submitter Type (dropdown). A 'QUICK HELP' button with a 'Help About This Page' link is located on the right. At the bottom of the form are buttons for 'Next', 'Save Work-In-Progress', 'Case Summary', and 'Cancel Case Creation'. A note at the top left of the form states: 'A superscript (\*) indicates a field is required for submission.'

Slide notes

Add, change, or delete any of the information as needed.

Slide 23 - of 30

The screenshot shows the 'Case Information' section of the 'Workers' Compensation Set-Aside Web Portal'. 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 Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Logoff. Below the navigation bar, there are tabs for 'Beneficiary/Claimant \*', 'Diagnosis Codes \*', 'Prescriptions \*', 'WC Carrier \*', 'Employer \*', 'Attorney', 'Notes', 'Documents \*', and 'Summary'. The 'Beneficiary/Claimant Information' section contains various input fields, many with a superscript '1' indicating they are required. These fields include Last Name, First Name, MI, Beneficiary HICN (with a masked value '\*\*\*\*\*A'), Beneficiary/Claimant SSN, Beneficiary/Claimant Date of Birth, Gender, Address Line 1, Address Line 2, City, State of Residence (a dropdown menu), Zip Code, Phone, State where injury occurred (a dropdown menu), and Submitter Type (a dropdown menu). A 'QUICK HELP' button with a 'Help About This Page' link is located on the right side. At the bottom of the form, there are three buttons: 'Next', 'Save Work-In-Progress', and 'Case Summary', along with a 'Cancel Case Creation' button.

Slide notes

Once all corrections have been made, click Next to navigate back to the Registration Summary page.

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Workers' Compensation Set-Aside Web Portal

[Skip Navigation](#)

HomeAbout This SiteCMS LinksHow To...Reference MaterialsContact UsLogoff

### Registration Summary

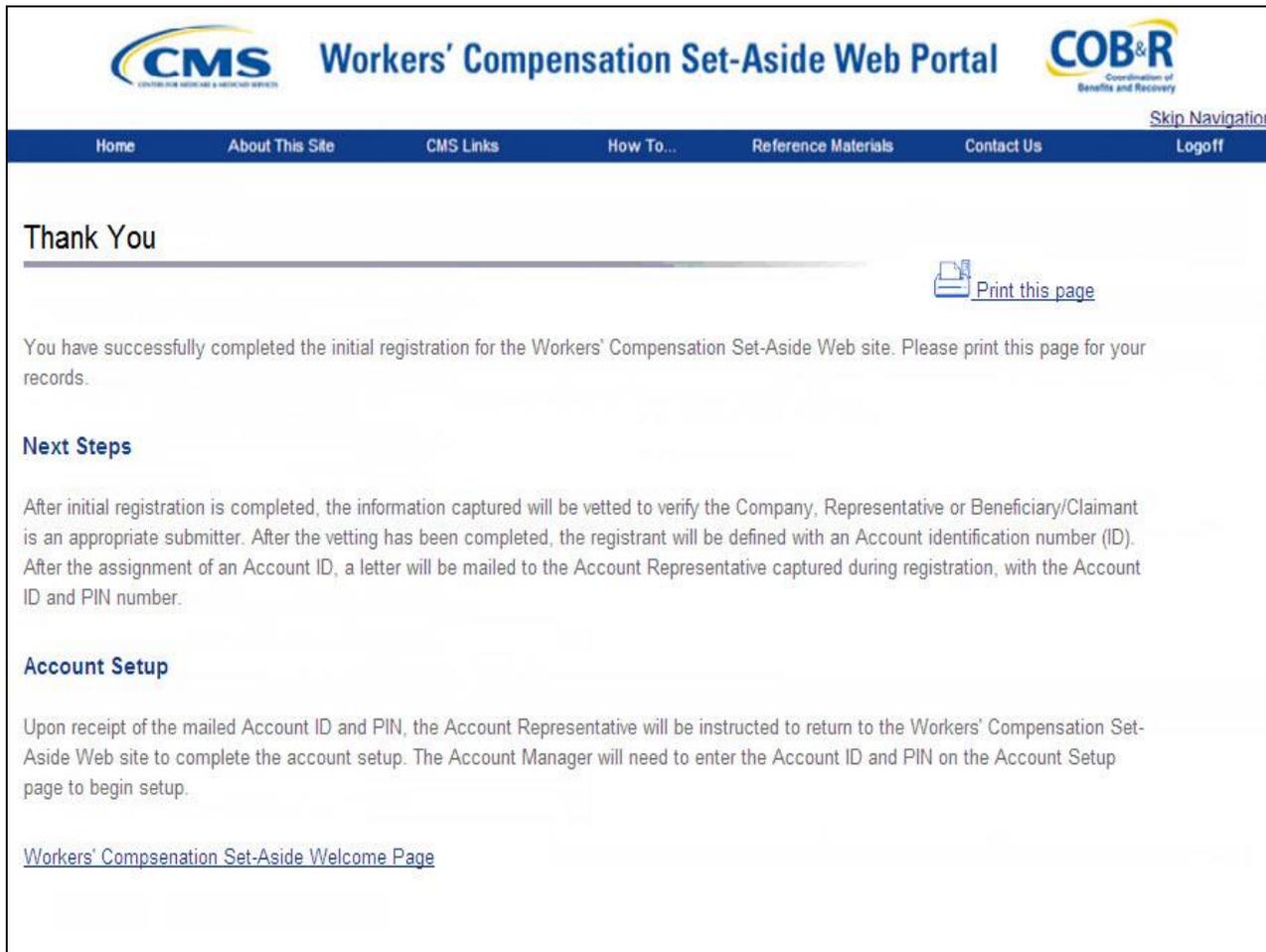
 [Print this page](#)

<p>Account Type: Representative <span style="float: right;"><input type="button" value="Edit"/></span></p> <p><b>Representative Information</b> <span style="float: right;"><input type="button" value="Edit"/></span></p> <p>First Name: FIRST MI: M Last Name: LAST</p> <p>SSN: ### ## ####</p> <p>E-Mail Address: AAAAAAAAAAAAAA</p> <p>Phone ### ##-#### ext. ####</p> <p>Fax: ### - ##-####</p> <p><b>Representative Mailing Address:</b></p> <p>Address Line 1: AAAAAAAAAAAAAA</p> <p>Address Line 2: AAAAAAAAAAAAAA</p> <p>City: AAAAAAAAAAAAAA</p> <p>State: AAAAAAAAAAAAAA</p> <p>Zip Code: ##### - ####</p> <div style="display: flex; justify-content: space-between; margin-top: 10px;"><input type="button" value="Previous"/> <input type="button" value="Submit Registration"/></div>	<p><b>Beneficiary Information</b> <span style="float: right;"><input type="button" value="Edit"/></span></p> <p>Last Name: LAST First Initial F</p> <p>HICN: #####A</p> <p>Date of Birth: MONTH ##, ####</p> <p>Gender: Male</p>
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Slide notes

When all of the registration information has been verified, click Submit Registration.

## Slide 25 - of 30



The screenshot shows the 'Thank You' page of the Workers' Compensation Set-Aside Web Portal. At the top, there are logos for CMS (Center for Medicare & Medicaid Services) and COB&R (Coordination of Benefits and Recovery). The page 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 features a 'Thank You' heading, a 'Print this page' button, and a message: 'You have successfully completed the initial registration for the Workers' Compensation Set-Aside Web site. Please print this page for your records.' Below this, there are sections for 'Next Steps' and 'Account Setup'. The 'Next Steps' section explains that the information captured will be vetted to verify the Company, Representative or Beneficiary/Claimant is an appropriate submitter, and that an Account ID and PIN number will be mailed to the Account Representative. The 'Account Setup' section states that upon receipt of the mailed Account ID and PIN, the Account Representative will be instructed to return to the website to complete the account setup. A link for 'Workers' Compensation Set-Aside Welcome Page' is provided at the bottom.

**Slide notes**

The Thank You page displays.

This page outlines the next steps in the registration process.

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## Next Steps

- Benefits Coordination and Recovery Center (BCRC)
  - Validates information
  - Sends letter to beneficiary/claimant which includes
    - Personal Identification Number (PIN)
    - Account Identification Number (ID)/Submitter ID
- Beneficiary/Claimant
  - Should receive PIN letter within 10 business days
  - If not, contact a BCRC EDI Representative
  - Must complete Account Setup on the WCMSAP

### Slide notes

Once your registration application has been submitted, the information provided will be validated by the BCRC.

Within two weeks, the BCRC will send a letter to you with a personal identification number (PIN) and an Account Identification Number (ID)/Submitter ID via U.S. Mail.

If this is not received within 10 business days, contact a BCRC Electronic Data Interchange (EDI) Representative.

When you have received the PIN and Account ID/Submitter ID, you must complete the next step in the registration process which is Account Setup.

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## Next Steps

- Complete Account Setup on the WCMSAP Web site
  - Enter the Account ID/Submitter ID and PIN on the main page
- Profile Report
  - Will be e-mailed to you once the Account Setup is completed
  - Will include all information previously entered
  - May take up to 10 business days to receive
  - Must be reviewed, signed, and returned to the BCRC within 60 days
  - When returning the signed Profile Report via e-mail, include 'WCMSAP Profile Report' in the subject line
  - If not received within 60 days, the account will be deleted on the 60th business day

### Slide notes

Account Setup must be completed on the WCMSAP Web site. You will need to enter the Account ID/Submitter ID and PIN on the main page to begin Account Setup.

Once the Account Setup is completed, the BCRC will send an e-mail notification to you, including a Profile Report denoting all information previously recorded during registration and any additional information provided during the Account Setup.

It may take up to 10 business days to receive the Profile Report.

The Profile Report must be reviewed, signed, and returned to the BCRC within 60 days.

When returning the signed Profile Report via e-mail, use "WCMSAP Profile Report" in the subject line. If a signed Profile Report is not received within that timeframe, the account will be automatically deleted on the 60th business day.

If the account is deleted, the registration process must be restarted from the beginning.

## Slide 28 - of 30



The screenshot shows the top of a web portal with the CMS logo on the left and the COB&R logo on the right. The main title is "Workers' Compensation Set-Aside Web Portal". 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 has a "Thank You" heading followed by a horizontal line. To the right of the line is a "Print this page" button with a printer icon. Below this, a paragraph states: "You have successfully completed the initial registration for the Workers' Compensation Set-Aside Web site. Please print this page for your records." The next section is titled "Next Steps" and contains a paragraph: "After initial registration is completed, the information captured will be vetted to verify the Company, Representative or Beneficiary/Claimant is an appropriate submitter. After the vetting has been completed, the registrant will be defined with an Account identification number (ID). After the assignment of an Account ID, a letter will be mailed to the Account Representative captured during registration, with the Account ID and PIN number." The following section is titled "Account Setup" and contains a paragraph: "Upon receipt of the mailed Account ID and PIN, the Account Representative will be instructed to return to the Workers' Compensation Set-Aside Web site to complete the account setup. The Account Manager will need to enter the Account ID and PIN on the Account Setup page to begin setup." At the bottom of the content area is a link: "Workers' Compensation Set-Aside Welcome Page".

## Slide notes

To return to the WCMSAP Welcome page, click the Workers' Compensation Set-Aside Welcome Page link.

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The slide features a light blue background with a white border. 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 Registration Process for Self Submitters course. The information in this course can be referenced by using the document at the link below." Below this text is a blue underlined URL: <https://www.cob.cms.hhs.gov/WCMSA/help/userManual/WCMSAUserManual.pdf>.

**Slide notes**

You have completed the Registration Process for Self Submitters course.

The information in this course can be referenced by using the document at the link below:

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

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The slide features a light blue background with a white curved graphic on the left side. In the top left corner is the CMS logo (Centers for Medicare & Medicaid Services). In the top right corner is the COB&R logo (Coordination of Benefits and Recovery). The main text in the center 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>.