



Account Setup- Corporate

Slide 1 of 40 Account Setup-Corporate



Workers' Compensation Medicare Set-Aside Portal (WCMSAP) Account Setup Corporate Account

Version 5.5, 07/02/2018
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) Account Setup course.

Note: This module is intended for corporate WCMSAP account users. A corporate account indicates that the submitter is a corporate entity with an Employer Identification Number (EIN) and will be regularly submitting WCMSA requests.

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.

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: [CMS Home Page](#).

Course Overview

- Account Setup Process
 - Establish Account
 - Establish Login Identification (ID)/Password
- Next Steps



Slide notes

This course will demonstrate how to complete the Account Setup, including establishing an account and a Login Identification (ID) and password. This course will also describe the next steps to follow once the Account Setup has been submitted.

Getting Started

- Corporate entity must identify Account Manager
- Account Manager completes Account Setup as long as
 - Corporate entity has completed New Registration step
 - Authorized Representative has received mailing from Benefits Coordination and Recovery Center (BCRC) containing
 - Personal Identification Number (PIN)
 - Account ID/Submitter ID

Slide notes

To begin, the corporate entity must identify their Account Manager. The Account Manager is responsible for completing the Account Setup.

The Account Manager may initiate the Account Setup if the corporate entity has already completed the New Registration step and their Authorized Representative has already received a mailing from the Benefits Coordination and Recovery Center (BCRC) containing the Personal Identification Number (PIN) and Account ID/Submitter ID.

The Account Manager will need this information to complete the Account Setup.

Getting Started

- Account Manager
 - Information recorded during Account Setup
 - Only one for each WCMSAP account
 - Controls the administration of the account
 - Manages the overall process
 - May choose to manage the entire account or invite other employees to assist in the process
- Electronic Data Interchange (EDI) Representative
 - Handles reassignment of Account Manager, if needed

Slide notes

During Account Setup, information for the corporate entities' Account Manager will be recorded. Each WCMSAP account can only have one Account Manager.


This is the individual who controls the administration of the account and manages the overall process.

The Account Manager may choose to manage the entire account or may invite other company employees to assist in this process.

For more information on the Account Manager's role, please see the Basic Functions for Account Managers CBT.

Note: An Electronic Data Interchange (EDI) Representative will handle the reassignment of an Account Manager if an Account Manager needs to be changed for an account.

Slide 6 of 40 Login Warning

Login Warning [Print this page](#)

UNAUTHORIZED ACCESS TO THIS COMPUTER SYSTEM IS PROHIBITED BY LAW

This warning banner provides privacy and security notices consistent with applicable federal laws, directives, and other federal guidance for accessing this Government system, which includes: (1) this computer network, (2) all computers connected to this network, and (3) all devices and storage media attached to this network or to a computer on this network. This system is provided for Government-authorized use only.

Unauthorized or improper use of this system is prohibited and may result in disciplinary action and/or civil and criminal penalties.

Personal use of social media and networking sites on this system is limited as to not interfere with official work duties and is subject to monitoring.

By using this 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 system.

*The Government may monitor, record, and audit your system usage, including usage of personal devices and email systems for official duties or to conduct HHS business. Therefore, you have no reasonable expectation of privacy regarding any communication or data transiting or stored on this 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 system.

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

<http://www.cms.hhs.gov/About-CMS/Agency-Information/Aboutwebsite/Security-Protocols.html>

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

[Privacy Policy](#) [User Agreement](#) [Adobe Acrobat](#)

Slide notes

In order to perform the WCMSAP Account Setup, the Account Manager must go to the WCMSAP Web site found at the following URL: [WCMSA Portal](#).

Slide 7 of 40 Data Use Agreement (DUA)

Login Warning [Print this page](#)

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[Privacy Policy](#) [User Agreement](#) [Adobe Acrobat](#)

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.

Slide 8 of 40 Login Warning

Login Warning [Print this page](#)

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[I Accept](#)

[Decline](#)

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[Privacy Policy](#) [User Agreement](#) [Adobe Acrobat](#)

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 complete Account Setup.

Slide 9 of 40 Welcome to the WCMSAP

The screenshot shows the homepage of the Workers' Compensation Set-Aside Web Portal (WCMSAP). At the top, there are logos for CMS (Centers for Medicare & Medicaid Services) and COB&R (Coordination of Benefits and Recovery), along with the title "Workers' Compensation Set-Aside Web Portal". A navigation bar includes links for "About This Site", "CMS Links", "How To...", "Reference Materials", and "Contact Us", with a "Skip Navigation" link on the right.

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>

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

Once you have clicked on the I Accept link, you will be brought to the Login (Welcome) page.

Slide 10 of 40 Welcome to the WCMSAP

The screenshot shows the homepage of the Workers' Compensation Set-Aside Web Portal (WCMSAP). At the top, there are logos for CMS (Centers for Medicare & Medicaid Services) and COB&R (Coordination of Benefits and Recovery), along with the title "Workers' Compensation Set-Aside Web Portal". A navigation bar includes links for "About This Site", "CMS Links", "How To...", "Reference Materials", and "Contact Us", with a "Skip Navigation" link on the right.

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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

To begin this process, your designated Account Manager must click the Account Setup button.

Slide 11 of 40 Account Setup Intro

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

Account Setup Intro

You have selected a link that guides you through the process of establishing a new Account Manager ID for the Workers' Compensation Set-Aside Web Portal (WCMSAP). Please have your Account IDentification Number (EIN) and Personal Identification Number (PIN) available. The Account ID and PIN are listed on the mailing that was sent to your submitter contact.

If you are already associated with a Submitter on the WCMSA Web Portal, you will not be allowed to register for a different Submitter. An Account Manager is only allowed to be associated with one Submitter.

During this process you will be:

- Establishing an account for the Submitter, and
- Establishing your personal Login ID to the Workers' Compensation Set-Aside Web Portal (WCMSAP).

Before proceeding it is important to understand the roles of the various WCMSAP users, and their respective responsibilities to ensure the Submitter accounts are managed correctly. The role of the Account Manager and is described below.

Slide notes

The Account Setup Intro page will display. This page describes the Account Setup process and informs you of your duties as the Account Manager.

Slide 12 of 40 Account Setup Intro

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

Account Setup Intro

You have selected a link that guides you through the process of establishing a new Account Manager ID for the Workers' Compensation Set-Aside Web Portal (WCMSAP). Please have your Account IDentification Number (EIN) and Personal Identification Number (PIN) available. The Account ID and PIN are listed on the mailing that was sent to your submitter contact.

If you are already associated with a Submitter on the WCMSA Web Portal, you will not be allowed to register for a different Submitter. An Account Manager is only allowed to be associated with one Submitter.

During this process you will be:



- Establishing an account for the Submitter, and
- Establishing your personal Login ID to the Workers' Compensation Set-Aside Web Portal (WCMSAP).

Before proceeding it is important to understand the roles of the various WCMSAP users, and their respective responsibilities to ensure the Submitter accounts are managed correctly. The role of the Account Manager and is described below.

Slide notes

Read the introduction, then click Next to continue with the Account Setup process.

Slide 13 of 40 Account Setup Page

**Workers' Compensation Set-Aside Web Portal**Coordination of
Benefits and Recovery

[Skip Navigation](#)

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

Account Setup

Please enter the Account Identification Number (Account ID) and Personal Identification Number (PIN) sent to the account contact after completion of the New Registration step.

We also ask for your E-mail address to see if you are already associated to another account on the WCMSA Web Portal. Existing users will not be allowed to be associated to multiple WCMSAP accounts. New users must go through the process of creating a Login ID and Password.

QUICK HELP
[Help About This Page](#)

An asterisk (*) indicates a required field.

Account ID: *



Personal Identification Number (PIN): *

Account Manager's E-Mail Address: *

Re-enter E-Mail Address: *

Slide notes

The Account Setup page will display.

**Workers' Compensation Set-Aside Web Portal**Coordination of
Benefits and Recovery

[Skip Navigation](#)

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

Account Setup

Please enter the Account Identification Number (Account ID) and Personal Identification Number (PIN) sent to the account contact after completion of the New Registration step.

We also ask for your E-mail address to see if you are already associated to another account on the WCMSA Web Portal. Existing users will not be allowed to be associated to multiple WCMSAP accounts. New users must go through the process of creating a Login ID and Password.

QUICK HELP
[Help About This Page](#)

An asterisk (*) indicates a required field.

Account ID: *

Personal Identification Number (PIN): *



Account Manager's E-Mail Address: *

Re-enter E-Mail Address: *

Slide notes

This page requires the Account Manager to enter the Account ID and PIN that were mailed to the corporate Authorized Representative.

The Account Manager's e-mail address is also required in order to verify that he/she is an authorized user.



Workers' Compensation Set-Aside Web Portal

[Skip Navigation](#)

About This SiteCMS LinksHow To...Reference MaterialsContact Us

Account Setup

Please enter the Account Identification Number (Account ID) and Personal Identification Number (PIN) sent to the account contact after completion of the New Registration step.

We also ask for your E-mail address to see if you are already associated to another account on the WCMSA Web Portal. Existing users will not be allowed to be associated to multiple WCMSAP accounts. New users must go through the process of creating a Login ID and Password.

QUICK HELP
[Help About This Page](#)

An asterisk (*) indicates a required field.

Account ID: *



Personal Identification Number (PIN): *

Account Manager's E-Mail Address: *

Re-enter E-Mail Address: *

Slide notes

When this page is completed, click Next to continue.

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

[Skip Navigation](#)

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

Account Setup

Please enter the Account Identification Number (Account ID) and Personal Identification Number (PIN) sent to the account contact after completion of the New Registration step.

We also ask for your E-mail address to see if you are already associated to another account on the WCMSA Web Portal. Existing users will not be allowed to be associated to multiple WCMSAP accounts. New users must go through the process of creating a Login ID and Password.

QUICK HELP
[Help About This Page](#)

An asterisk (*) indicates a required field.

Account ID: *

Personal Identification Number (PIN): *



Account Manager's E-Mail Address: *

Re-enter E-Mail Address: *

Slide notes

The system will validate the Account ID and PIN. If the Account ID and/or PIN are invalid, the system will display an error message.

Slide 17 of 40 Account Setup Page

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

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

Account Setup

Please enter the Account Identification Number (Account ID) and Personal Identification Number (PIN) sent to the account contact after completion of the New Registration step.

We also ask for your E-mail address to see if you are already associated to another account on the WCMSA Web Portal. Existing users will not be allowed to be associated to multiple WCMSAP accounts. New users must go through the process of creating a Login ID and Password.

QUICK HELP
[Help About This Page](#)

An asterisk (*) indicates a required field.

Account ID: *



Personal Identification Number (PIN): *

Account Manager's E-Mail Address: *

Re-enter E-Mail Address: *

Slide notes

The system will also validate your e-mail address to determine if you already have a Login ID. If the system detects you are already associated with another WCMSAP account, as either an Account Manager or Account Designee, the system will prevent you from registering as the Account Manager for this account.

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

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

Account Setup

Please enter the Account Identification Number (Account ID) and Personal Identification Number (PIN) sent to the account contact after completion of the New Registration step.

We also ask for your E-mail address to see if you are already associated to another account on the WCMSA Web Portal. Existing users will not be allowed to be associated to multiple WCMSAP accounts. New users must go through the process of creating a Login ID and Password.

QUICK HELP
[Help About This Page](#)

An asterisk (*) indicates a required field.

Account ID: *

Personal Identification Number (PIN): *

Account Manager's E-Mail Address: *

Re-enter E-Mail Address: *

Slide notes

Additionally, if the system detects that another user is already registered as the Account Manager for the same account you are trying to register for, the system will display an error message.

The error message will inform you that you cannot register and it will instruct you to contact the BCRC.

Slide 19 of 40 Account Setup – Company Informatoin

Home

About This Site

CMS Links

How To...

Reference Materials

Contact Us

Logoff

Account Setup - Company Information

Corporate Information

Account Representative Information

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

First Name:FIRST MI: M Last Name: LAST

Corporation Name: AAAAAAAAAAAAA

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

Business Mailing Address:

Address Line 1:AAAAAAAAAAAAA

Address Line 2: AAAAAAAAAAAAA

City: AAAAAAAAAAAAA

State: AAAAAAAAAAAAA

Zip Code: ##### - #####

Previous

Next

Slide notes

If the system is able to validate all entered data, the Account Setup - Company Information page will display. This screen will be pre-filled with the company information entered during the initial Registration process.

Slide 20 of 40 Account Setup – Company Informatoin

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

Account Setup - Company Information

Corporate Information

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

Corporation Name: AAAAAAAAAAAAA

Account Representative Information

First Name:FIRST MI: M Last Name: LAST

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

Business Mailing Address:

Address Line 1:AAAAAAAAAAAAA

Address Line 2: AAAAAAAAAAAAA

City: AAAAAAAAAAAAA

State: AAAAAAAAAAAAA

Zip Code: ##### - #####



Previous

Next

Slide notes

Review the listed information. If any of this information is incorrect, contact an EDI Representative to have it corrected. Click Next to continue.

Slide 21 of 40 Account Manager Personal Information

**Workers' Compensation Set-Aside Web Portal**
COORDINATION OF BENEFITS AND RECOVERY

[Skip Navigation](#)

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

Account Manager Personal Information

Please click this button if information is identical to that provided during initial registration.

QUICK HELP
[Help About This Page](#)

An asterisk (*) indicates a required field.

First Name: * MI: Last Name: *

E-mail Address: *

Phone: * - - - ext.

Mailing Address:

Address Line 1: *

Address Line 2:

City: *

State: *



Zip Code: * -

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.

Slide notes

The Account Manager Personal Information page will display. The information entered on this page is required for subsequent communications. All fields denoted by an asterisk (*) are required.

Slide 22 of 40 Account Manager Personal Information

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

[Skip Navigation](#)

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

Account Manager Personal Information

Please click this button if information is identical to that provided during initial registration.

QUICK HELP
[Help About This Page](#)

An asterisk (*) indicates a required field.

First Name: * MI: Last Name: *

E-mail Address: *

Phone: * - - ext.

Mailing Address:

Address Line 1: *

Address Line 2:

City: *

State: *



Zip Code: * -

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.

Slide notes

The e-mail Address field will be populated with the Account Manager e-mail address that was entered on the Account Setup page.

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

[Skip Navigation](#)

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

Account Manager Personal Information

Please click this button if information is identical to that provided during initial registration.

Same as Submitter

QUICK HELP
[Help About This Page](#)

An asterisk (*) indicates a required field.

First Name: * MI: Last Name: *

E-mail Address: *

Phone: * - - - ext.

Mailing Address:

Address Line 1: *

Address Line 2:

City: *

State: *

Zip Code: * -

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.

Slide notes

Enter the required personal information.

Slide 24 of 40 User Agreement

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 medical 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

When the Account Manager information has been entered, scroll down to view the User Agreement and Privacy Policy. Accept the User Agreement, then click Next.

The system requires you to click "I accept" in order to continue the Account Setup.

Note: You can register as an Account Manager for an account if you are already a registered Medicare, Medicaid, and SCHIP Extension Act of 2007 (MMSEA) Mandatory Reporting user.

Slide 25 of 40 User Agreement

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[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 medical 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 system will confirm that all required fields have been entered before allowing you, the Account Manager, to continue with the Account Setup process.

The system will display an error message if you submit incomplete or invalid information (i.e., the entered information does not pass the WCMSAP edits).

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

Account Manager 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 the access and updating privileges restricted to the Account Manager.

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

If you are a new user, the Account Manager Login Information page displays.

Note: If you have already registered to use the WCMSAP, this page will not display and you will not be prompted to create a Login ID and Password.

Login ID and Password

- Login ID
 - Must be 7 characters
 - Must be in the format of AA999AA
 - Cannot be same as Password
- Password
 - Must be changed every 60 days
 - Must be 8 characters in length
 - Must contain at least one upper case letter, one lower case letter, one number, and one special character
 - Cannot be changed more than once per day
 - Cannot contain 4 consecutive characters from previous password
 - Must be different from last 6 passwords
 - Cannot contain a reserved word

Slide notes

New users must set up a Login ID and Password (using the following guidelines): Login IDs must be 7 characters, Login IDs must be in the format of AA999AA, login ID and password cannot be the same, passwords must be changed every 60 days, passwords must be 8 characters in length, passwords must contain at least one upper case letter, one lower case letter, one number, and one special character, passwords cannot be changed more than once per day, passwords cannot contain 4 consecutive characters from the previous password, passwords must be different from the last 6 passwords, and passwords cannot contain a reserved word.

The updated Reserved Words List can be referenced in the latest WCMSAP User Guide.

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

Account Manager 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 the access and updating privileges restricted to the Account Manager.

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 security information requested on this page will allow the system to authenticate your identity each time you log in to the WCMSAP. Choose your Login ID and Password carefully.

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

Account Manager 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 the access and updating privileges restricted to the Account Manager.

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

Create your Login ID, and enter and re-enter a Password. You will use your Login ID and Password to enter the WCMSAP site and manage the account, manage designees, create and view cases, and upload file attachments.

The Security Questions will allow you to access your Login ID and reset your Password in the event you forget either one.

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

Account Manager 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 the access and updating privileges restricted to the Account Manager.

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

When you have completed the Account Manager Login Information page, click Next to continue.

Slide 31 of 40 Account Manager Summary

The screenshot shows the 'Account Manager Summary' page of the '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: '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 'Account Manager Summary' and contains a paragraph of instructions. To the right is a 'QUICK HELP' box with a link to 'Help About This Page'. The form is divided into two sections: 'Personal Information' and 'Mailing Address'. The 'Personal Information' section includes fields for First Name, Last Name, E-Mail Address, Phone, and Login ID, each with an 'Edit' button. The 'Mailing Address' section includes fields for Address Line 1, Address Line 2, City, State, and Zip Code. At the bottom are three buttons: 'Previous', 'Submit Account Setup', and 'Cancel'.

Workers' Compensation Set-Aside Web Portal

Account Manager Summary

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 Account Setup' button to submit your information. Click 'Cancel' to cancel the setup process; all data will be lost. Please print this page for your records.

QUICK HELP
[Help About This Page](#)

Personal Information

First Name: MI:

Last Name:

E-Mail Address:

Phone: ext.

Login ID

Login ID:

Mailing Address:

Address Line 1:

Address Line 2:

City:

State:

Zip Code:

Slide notes

The Account Manager Summary page will display next. This page shows all of the information entered during Account Setup.

Slide 32 of 40 Account Manager Summary

**Workers' Compensation Set-Aside Web Portal**
COORDINATION OF BENEFITS AND RECOVERY

[Skip Navigation](#)

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

Account Manager Summary

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 Account Setup' button to submit your information. Click 'Cancel' to cancel the setup process; all data will be lost. Please print this page for your records.

QUICK HELP
[Help About This Page](#)

Personal Information

Login ID

First Name: MI:

Last Name:

Login ID:

E-Mail Address:

Phone: ext.

Mailing Address:

Address Line 1:

Address Line 2:

City:

State:

Zip Code:

Slide notes

All information should be reviewed and verified before continuing. You may return to specific sections to correct or change the previously entered information by clicking the Edit button next to the section that needs to be modified.

Slide 33 of 40 Account Summary Page

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 *

What city were you born?

Answer 1 *

Security Question 2 *

What is your mother's maiden name?

Answer 2 *

Previous

Next

Slide notes

This will return you to the applicable page (Personal Information, Mailing Address or Login ID) to make modifications. Once all corrections have been made, click Next at the bottom of that page to navigate back to the Account Manager Summary page.

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Slide 34 of 40 Account Manager Summary

The screenshot shows the 'Account Manager Summary' page of the '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 '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 'Account Manager Summary' and contains a paragraph of instructions. To the right is a 'QUICK HELP' box with a link to 'Help About This Page'. The form is divided into two sections: 'Personal Information' and 'Login ID', each with an 'Edit' button. The 'Personal Information' section includes fields for First Name, Last Name, E-Mail Address, and Phone. The 'Login ID' section includes a field for Login ID. Below these is the 'Mailing Address' section with fields for Address Line 1, Address Line 2, City, State, and Zip Code. At the bottom are three buttons: 'Previous', 'Submit Account Setup', and 'Cancel'.

Workers' Compensation Set-Aside Web Portal

Account Manager Summary

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 Account Setup' button to submit your information. Click 'Cancel' to cancel the setup process; all data will be lost. Please print this page for your records.

QUICK HELP
[Help About This Page](#)

Personal Information

First Name: MI:

Last Name:

E-Mail Address:

Phone: ext.

Login ID

Login ID:

Mailing Address:

Address Line 1:

Address Line 2:

City:

State:

Zip Code:

Slide notes


After you have verified that all entered information is correct, click the Submit Account Setup button to submit the information.

Slide 35 of 40 Thank You

[Skip Navigation](#)

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

Thank You

 [Print this page](#)

You have successfully completed the Account Setup for the Workers' Compensation Medicare Set-Aside Web site and established yourself as the Account Manager for the Account ID. Please print this page for your records.

Next Steps

You may return to the Workers' Compensation Medicare Set-Aside Web site Welcome page, login using the Login ID and Password you just created to access accounts associated to your ID.

Please note: when returning your profile to the COBVA mailbox, please write "WCMSAP Profile Report" in the subject line. This is so the EDI Reps responsible for routing COBVA messages know to who they should send profile reports.

You can visit the Workers' Compensation Medicare Set Aside page at [Workers' Compensation Set-Aside Welcome Page](#)

Slide notes


The system will display a Thank You page with instructions for your next steps after successful Account Setup.

Slide 36 of 40 Thank You

[Skip Navigation](#)

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

Thank You

 [Print this page](#)

You have successfully completed the Account Setup for the Workers' Compensation Medicare Set-Aside Web site and established yourself as the Account Manager for the Account ID. Please print this page for your records.

Next Steps

You may return to the Workers' Compensation Medicare Set-Aside Web site Welcome page, login using the Login ID and Password you just created to access accounts associated to your ID.

Please note: when returning your profile to the COBVA mailbox, please write "WCMSAP Profile Report" in the subject line. This is so the EDI Reps responsible for routing COBVA messages know to who they should send profile reports.

You can visit the Workers' Compensation Medicare Set Aside page at [Workers' Compensation Set-Aside Welcome Page](#)

Slide notes

Click the Workers' Compensation Medicare Set-Aside Welcome Page link to return to the Welcome page.

Next Steps

- Account Setup complete
- Registered as Account Manager
 - Control administration of WCMSAP account
- Account Manager will receive Profile Report from BCRC via e-mail
 - Review, sign, and return to BCRC
 - Cannot submit, view or create cases until the signed Profile Report is received by the BCRC
- Login to the account to maintain account and case information, upload and replace documents, submit cases, and manage Designee access
- You may manage the entire account or invite other company employees to assist as Account Designees
 - Login to the WCMSAP site using the Login ID and Password you created during the Account Setup process to add Designees

Slide notes

You have successfully setup the account and registered yourself as the Account Manager. As the Account Manager, you control the administration of the WCMSAP account.

You will receive a Profile Report from the BCRC via e-mail, which must be reviewed for accuracy then signed and returned to the BCRC. You cannot submit, view, or create cases until the signed Profile Report is received by the BCRC.

After the report has been received by the BCRC, you can login to the account to maintain account and case information, upload and replace documents, submit cases, and manage Designee access.

You may choose to manage the entire account or you may invite other company employees to assist as Account Designees.

To add Designees, you must login to the WCMSAP site using the Login ID and Password you created during the Account Setup process.

Next Steps

- E-mail notification sent to you and Account Representative
 - Includes Profile Report
 - All information previously recorded during registration
 - Additional information provided during Account Setup
 - Contact the EDI Department if you do not receive Profile Report after 10 business days
- You or Account Representative will have 60 business days to review, sign, and return Profile Report to BCRC
 - When returning the signed Profile Report via e-mail, use “WCMSAP Profile Report” in the subject line
 - If not received within timeframe, account will be deleted on the 60th business day and you must restart registration process over



Slide notes

Upon completion of all information for the Account Setup, an e-mail notification will be sent to you and the Account Representative. The e-mail will also include a Profile Report, noting 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. Contact the EDI Department if you do not receive a Profile Report after 10 business days.

You or the Account Representative will have 60 business days to review, sign, and return the Profile Report to the BCRC. 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, you must start the registration process from the beginning.

Slide 39 of 40 Account Setup – Corporate Conclusion



You have completed the WCMSAP Account Setup course.
The information in this course can be referenced by using
the document at the link below:
<https://www.cob.cms.hhs.gov/WCMSA/assets/wcmsa/userManual/WCMSAUserManual.pdf>.

Slide notes

You have completed the WCMSAP Account Setup course. The information in this course can be referenced by using the document at the link below: [WCMSA User Manual](#).

Slide 40 of 40 WCMSA Training Survey



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: [WCMSA Training Survey](#).