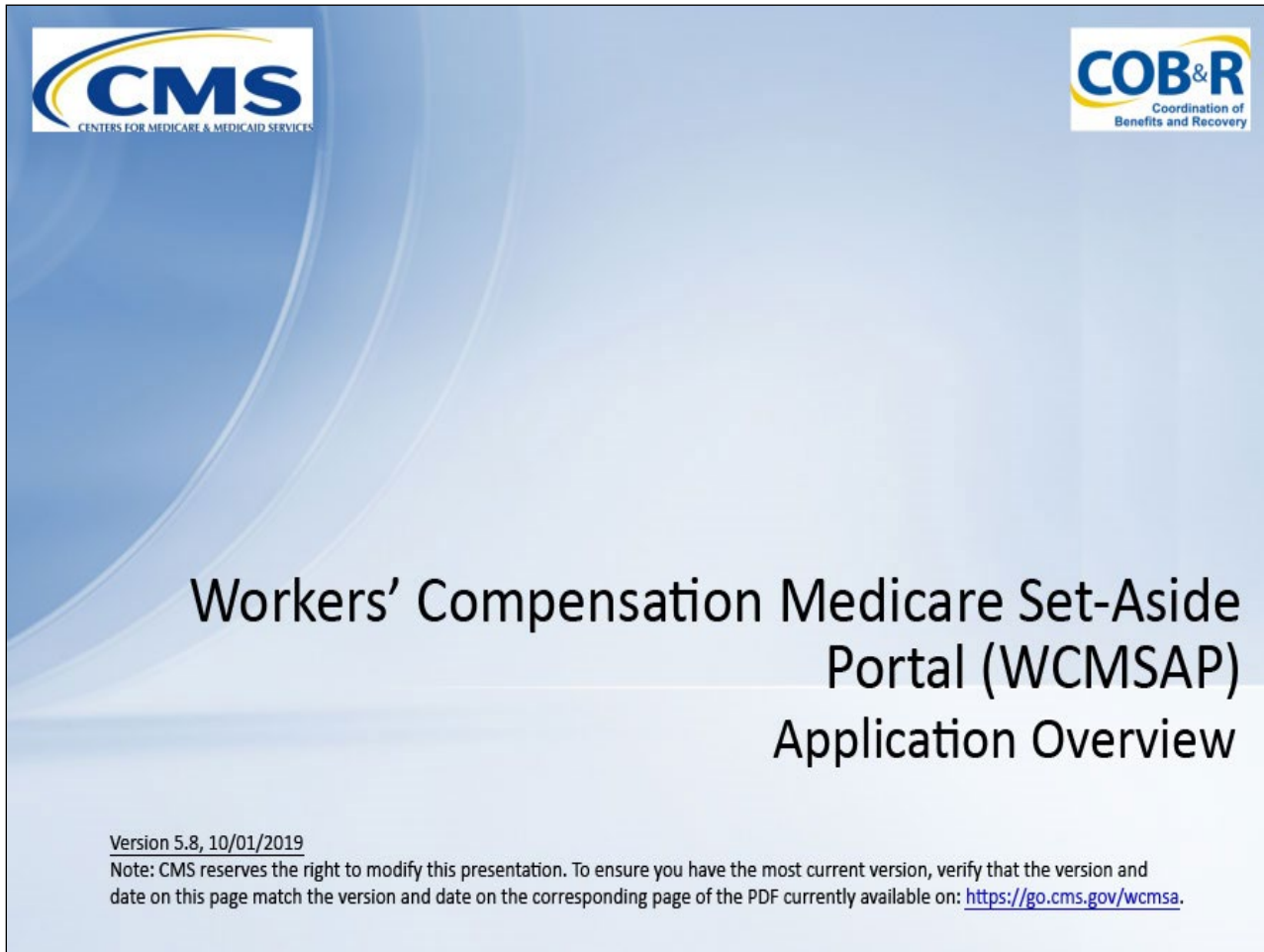


Application Overview

Slide 1 – of Application Overview



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

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

Version 5.8, 10/01/2019
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: <https://go.cms.gov/wcmsa>.

Slide notes

Welcome to the Workers' Compensation Medicare Set-Aside Portal (WCMSAP) Application Overview course. As a reminder, you may view the slide number you are on by clicking on the moving cursor. Additionally, you can view the narration by clicking the [CC] button in the lower right-hand corner of the screen.

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

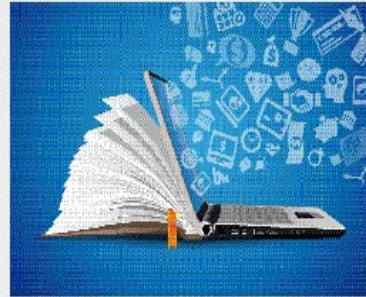
and does not constitute official Centers for Medicare & Medicaid Services (CMS) instructions for the WCMSAP.

All affected entities are responsible for following the applicable CMS instructions found at the following link: <http://go.cms.gov/wcmsa/>.

Course Overview

By the end of this course, you will be able to:

- Navigate the WCMSAP
- Discuss menu options within the WCMSAP
- Complete the annual attestation



Slide notes

By the end of this course, you will be able to :

- Navigate the WCMSAP
- Discuss menu options within the WCMSAP
- Complete the Yearly Attestation Information

Slide 4 - of 28 After Successful Login

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

WCMSAP

The WCMSAP provides an interface for entry of Workers' Compensation Medicare Set-Aside (WCMSA) proposals. You may use this site to enter the case information directly. The site also provides the ability to track submitted cases and the statuses without inquiry to the BCRC or CMS. If the account is a Representative account, you also have the ability to view information for your WCMSA(s) and submit an annual attestation via WCMSAP for all eligible WCMGAs where you are the identified administrator. Case Lookup and View Alert functions are also available. Click the desired link below to perform that function.

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

I'd like to...

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

QUICK HELP

[Help About This Page](#)

Account Settings

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

Privacy Policy User Agreement Adobe Acrobat

Slide notes

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

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

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

Slide 5 - of 28 CMS Links

The screenshot shows the WCMSAP website. At the top is a blue navigation bar with links: Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Logoff. On the right side, there is a 'QUICK HELP' box with a link 'Help About This Page'. Below this is an 'Account Settings' box with links: 'Update Account Information', 'Designee Maintenance', and 'View Account Activity'. The main content area on the left is titled 'WCMSAP' and contains a paragraph explaining the system's purpose: 'The WCMSAP provides an interface for entry of Workers' Compensation Medicare Set-Aside (WCMSA) proposals. You may use this site to enter the case information directly. The site also provides the ability to track submitted cases and the statuses without inquiry to the BCRC or CMS. If the account is a Representative account, you also have the ability to view information for your WCMSA(s) and submit an annual attestation via WCMSAP for all eligible WCMSAs where you are the identified administrator. Case Lookup and View Alert functions are also available. Click the desired link below to perform that function.' Below this paragraph is another paragraph: 'You may modify Account Settings by clicking the appropriate link under the Account Settings list'. Further down, under the heading 'I'd like to...', there are three links: 'Create a New Case', 'Case Lookup', and 'View Alerts'. At the bottom of the page is a blue footer bar with links: Privacy Policy, User Agreement, and Adobe Acrobat.

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

QUICK HELP

[Help About This Page](#)

WCMSAP

The WCMSAP provides an interface for entry of Workers' Compensation Medicare Set-Aside (WCMSA) proposals. You may use this site to enter the case information directly. The site also provides the ability to track submitted cases and the statuses without inquiry to the BCRC or CMS. If the account is a Representative account, you also have the ability to view information for your WCMSA(s) and submit an annual attestation via WCMSAP for all eligible WCMSAs where you are the identified administrator. Case Lookup and View Alert functions are also available. Click the desired link below to perform that function.

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

I'd like to...

[Create a New Case](#)

[Case Lookup](#)

[View Alerts](#)

Account Settings

[Update Account Information](#)

[Designee Maintenance](#)

[View Account Activity](#)

Privacy Policy User Agreement Adobe Acrobat

Slide notes

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

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

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

Slide 6 - of 28 Reference Materials

The screenshot shows the WCMSAP website. At the top is a blue navigation bar with links: Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Logoff. The main content area has a white background. On the left, the heading 'WCMSAP' is followed by a paragraph explaining the system's purpose for entering Workers' Compensation Medicare Set-Aside (WCMSA) proposals and tracking cases. Below this, it mentions the ability to modify account settings. On the right, there are two blue-bordered boxes. The top one is titled 'QUICK HELP' and contains a link 'Help About This Page'. The bottom one is titled 'Account Settings' and contains three links: 'Update Account Information', 'Designee Maintenance', and 'View Account Activity'. At the bottom of the page, there is a blue footer bar with links for 'Privacy Policy', 'User Agreement', and 'Adobe Acrobat'. Below the footer bar, the text 'I'd like to...' is followed by three links: 'Create a New Case', 'Case Lookup', and 'View Alerts'.

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

WCMSAP

The WCMSAP provides an interface for entry of Workers' Compensation Medicare Set-Aside (WCMSA) proposals. You may use this site to enter the case information directly. The site also provides the ability to track submitted cases and the statuses without inquiry to the BCRC or CMS. If the account is a Representative account, you also have the ability to view information for your WCMSA(s) and submit an annual attestation via WCMSAP for all eligible WCMSAs where you are the identified administrator. Case Lookup and View Alert functions are also available. Click the desired link below to perform that function.

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

I'd like to...

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

QUICK HELP

- [Help About This Page](#)

Account Settings

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

Privacy Policy User Agreement Adobe Acrobat

Slide notes

Reference Materials provides a link to the WCMSAP User Manual.

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

*Note: The contact address for the BCRC has changed. As a result, the system-generated Profile Report Email Notifications have been updated. The new address is:

Section 111 Reporting Program

P.O. Box 138892

Oklahoma City, OK 73113

If you have a program or technical problem involving your Section 111 data exchange, the first person to contact is your EDI representative. Your EDI Representative should always be sought out first to help you find solutions for any questions, issues or problems you have. If you have not yet been assigned an EDI Representative, please call the EDI Department number at 646-458-6740 for assistance.

Slide 7 - of 28 CMS Links

The screenshot shows the WCMSAP website. At the top is a blue navigation bar with links: Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Logoff. Below the navigation bar, on the left, is the heading "WCMSAP" followed by a paragraph describing the system's purpose: "The WCMSAP provides an interface for entry of Workers' Compensation Medicare Set-Aside (WCMSA) proposals. You may use this site to enter the case information directly. The site also provides the ability to track submitted cases and the statuses without inquiry to the BCRC or CMS. If the account is a Representative account, you also have the ability to view information for your WCMSA(s) and submit an annual attestation via WCMSAP for all eligible WCMGAs where you are the identified administrator. Case Lookup and View Alert functions are also available. Click the desired link below to perform that function." Below this paragraph is another paragraph: "You may modify Account Settings by clicking the appropriate link under the Account Settings list." To the right of the main content area, there are two boxes. The top box is titled "QUICK HELP" and contains a link "Help About This Page". The bottom box is titled "Account Settings" and contains three links: "Update Account Information", "Designee Maintenance", and "View Account Activity". At the bottom of the main content area, there is a section titled "I'd like to..." with three links: "Create a New Case", "Case Lookup", and "View Alerts". At the very bottom of the page is a blue footer bar with links: Privacy Policy, User Agreement, and Adobe Acrobat.

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

WCMSAP

The WCMSAP provides an interface for entry of Workers' Compensation Medicare Set-Aside (WCMSA) proposals. You may use this site to enter the case information directly. The site also provides the ability to track submitted cases and the statuses without inquiry to the BCRC or CMS. If the account is a Representative account, you also have the ability to view information for your WCMSA(s) and submit an annual attestation via WCMSAP for all eligible WCMGAs where you are the identified administrator. Case Lookup and View Alert functions are also available. Click the desired link below to perform that function.

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

I'd like to...

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

QUICK HELP

[Help About This Page](#)

Account Settings

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

Privacy Policy User Agreement Adobe Acrobat

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.

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

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

Slide 8 - of 28 Welcome Page

The screenshot shows the WCMSAP Welcome Page. At the top, there are logos for CMS (Centers for Medicare & Medicaid Services) and COB®R (Coordination of Benefits and Recovery), followed by 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. The main heading is "Welcome to the WCMSAP". Below this, a paragraph explains the site's purpose: providing an interface for entry of Workers' Compensation Medicare Set-Aside Arrangements (WCMSA) proposals for attorneys, Medicare beneficiaries, claimants, insurance carriers, and WCMSA vendors. It also mentions the ability to track submitted cases and statuses without inquiry to the BCRC or CMS. A link is provided for information on auxiliary aids and services: <http://www.medicare.gov/about-us/nondiscrimination/nondiscrimination-notice.html>. To the right, a "Sign into your account" box contains fields for "User Name:" and "Password:", with links for "Forgot ID" and "Forgot Password", and "Login" and "Clear" buttons. Below the welcome text, a "WCMSAP Message" section shows "N/A". A "GETTING STARTED" section advises users to refer to the "How To Get Started" option under the "How To" menu. Two large buttons are shown: "STEP 1 New Registration" and "STEP 2 Account Setup", with a note "(Account ID and P.I.N. required)" below them. The footer contains links for "Privacy Policy", "User Agreement", and "Adobe Acrobat".

Workers' Compensation Set-Aside Web Portal

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
N/A

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 P.I.N. required)

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

Slide notes

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

Slide 9 - of 28 Quick Help and Account Settings

The screenshot displays the WCMSAP website interface. At the top is a dark blue navigation bar with white text links: Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Logoff. Below this, the main content area has a white background. On the left, the heading 'WCMSAP' is followed by a paragraph explaining the system's purpose for entering Workers' Compensation Medicare Set-Aside (WCMSA) proposals and tracking cases. Below this paragraph is a link to 'Create a New Case', followed by 'Case Lookup' and 'View Alerts'. On the right side, there are two blue-bordered boxes. The top box is titled 'QUICK HELP' and contains a link 'Help About this Page'. The bottom box is titled 'Account Settings' and contains three links: 'Update Account Information', 'Designee Maintenance', and 'View Account Activity'. At the bottom of the page is a dark blue footer bar with white text links: Privacy Policy, User Agreement, and Adobe Acrobat.

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

WCMSAP

The WCMSAP provides an interface for entry of Workers' Compensation Medicare Set-Aside (WCMSA) proposals. You may use this site to enter the case information directly. The site also provides the ability to track submitted cases and the statuses without inquiry to the BCRC or CMS. If the account is a Representative account, you also have the ability to view information for your WCMSA(s) and submit an annual attestation via WCMSAP for all eligible WCMSAs where you are the identified administrator. Case Lookup and View Alert functions are also available. Click the desired link below to perform that function.

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

I'd like to...

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

QUICK HELP

- [Help About this Page](#)

Account Settings

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

Privacy Policy User Agreement Adobe Acrobat

Slide notes

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

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

For more information on the various Account Settings, see the Login and User Maintenance and Basic Functions-Account Manager CBT's

Slide 10 - of 28 Users Of WCMSAP

The screenshot displays the WCMSAP website interface. At the top is a dark blue navigation bar with white text links: Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Logout. Below this, the main content area has a white background. On the left, the heading "WCMSAP" is followed by a paragraph explaining the system's purpose for entering Workers' Compensation Medicare Set-Aside (WCMSA) proposals and tracking cases. Below this paragraph is another paragraph about modifying account settings. To the right of the main text, there are two blue-bordered boxes. The top box is titled "QUICK HELP" and contains a link "Help About This Page". The bottom box is titled "Account Settings" and contains three links: "Update Account Information", "Designee Maintenance", and "View Account Activity". At the bottom of the main content area, under the heading "I'd like to...", there are three links: "Create a New Case", "Case Lookup", and "View Alerts". A dark blue footer bar at the very bottom contains white text links: Privacy Policy, User Agreement, and Adobe Acrobat.

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

WCMSAP

The WCMSAP provides an interface for entry of Workers' Compensation Medicare Set-Aside (WCMSA) proposals. You may use this site to enter the case information directly. The site also provides the ability to track submitted cases and the statuses without inquiry to the BCRC or CMS. If the account is a Representative account, you also have the ability to view information for your WCMSA(s) and submit an annual attestation via WCMSAF for all eligible WCMSAs where you are the identified administrator. Case Lookup and View Alert functions are also available. Click the desired link below to perform that function.

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

I'd like to...

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

QUICK HELP

[Help About This Page](#)

Account Settings

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

Privacy Policy User Agreement Adobe Acrobat

Slide notes

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

Case management is handled using the following functions: Case lookup, Request case access, Upload file, and Download response file.

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

Slide 11 - of 28 Create New Information

New Case Creation

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

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

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

An asterisk (*) indicates a required field.

The Beneficiary/Claimant's Social Security Number (SSN) or Medicare ID must be provided. You may not provide both. The Initial Date of Injury CCYY may not be less than 1965.

The information below reflects the information provided during initial registration. If this information has changed it may be updated via the "Update Account Information" link on the WCMSAP Home page.

Medicare ID: * OR SSN: * - -

Re-Enter Medicare ID: * OR SSN: * - -

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

Last Name: * First Name: * MI:

Gender: * -Select- v

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

Proposed Settlement Amount: * \$ -

Slide notes

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

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

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

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

Slide 12 - of 28 Case Information Tabs

The screenshot shows the 'Case Information' tab selected in the WCMSAP application. The top navigation bar includes links for Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Logoff. Below the navigation bar, the 'Case Information' section is displayed with a sub-header 'Beneficiary/Claimant Information'. A note states: 'A superscript (*) indicates a field required for submission'. The form fields are as follows: Last Name (Doe), First Name (John), MI (A), Beneficiary Medicare ID (*****234B), Beneficiary/Claimant Date of Birth (06/15/1966 (MM/DD/YYYY)), Beneficiary/Claimant Gender (Male), State where injury occurred (dropdown menu showing '- Select -'), and Submitter Type (dropdown menu showing '- Select -'). A 'QUICK HELP' button is located on the right side of the form. At the bottom of the form, there are three buttons: 'Next', 'Save Work-In-Progress', and 'Case Summary'. The footer of the application includes links for Privacy Policy, User Agreement, and Adobe Acrobat.

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

Skip Navigation

Case Information

Beneficiary/Claimant * WCMSA Administrator * Diagnosis Codes * Prescriptions * WC Carrier * Employer* Attorney Notes

Documents * Summary

Beneficiary/Claimant Information

A superscript (*) indicates a field required for submission

Last Name: Doe

First Name: John

MI: A

Beneficiary Medicare ID: *****234B

Beneficiary/Claimant Date of Birth: 06/15/1966 (MM/DD/YYYY)

Beneficiary/Claimant Gender: Male

State where injury occurred: ¹ - Select -

Submitter Type: ¹ -Select-

QUICK HELP

[Help About This Page](#)

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

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

Slide notes

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

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

Slide 13 - of 28 Administrator Type

[Skip Navigation](#)

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

Case Information

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

WCMSPA Administrator

As part of the new case creation process, you are required to identify the administrator of the WCMSPA. The default option is 'Self'. A self-administrator is a Medicare beneficiary who is administering their WCMSPA on their own behalf. The Rep Payee option is for non corporate entities who are administering the WCMSPA on behalf of a beneficiary. The Professional Administrator option means that a professional entity will administer and account for the WCMSPA that was established to protect Medicare's interests. Click Continue to proceed or save the case as a work-in-progress.

*Note: When the Administrator Type is 'Professional Administrator', a copy of the Professional Administrator Agreement is required before you can submit this case. You can upload this document on the Documents tab.

An asterisk (*) indicates a required field.

Administrator Type:

☒ Self ☐ Rep Payee ☐ Professional Administrator

Name:

Address Line 1:

Address Line 2:

City:

State:

Zip Code:

Phone: - -

Fax: - -

E-mail Address:

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

Privacy Policy User Agreement Adobe Acrobat

Slide notes

As part of the new case creation process, you are required to identify the administrator of the WCMSPA. The default option is 'Self'. A self-administrator is a Medicare beneficiary who is administering their WCMSPA on their own behalf. The Rep Payee option is for non-corporate entities who are administering the WCMSPA on behalf of a beneficiary.

The Professional Administrator option means that a professional entity will administer and account for the WCMSPA that was established to protect Medicare's interests. Click Continue to proceed or save the case as a work-in-progress.

*Note: When the Administrator Type is 'Professional Administrator', a copy of the Professional Administrator Agreement is required before you can submit this case. You can upload this document on the Documents tab. For additional information on WCMSPA case creation, see the Case Submission CBT.

Slide 14 - of 28 Case Look Up Function

The screenshot displays the WCMSAP website. At the top is a blue navigation bar with links: Home, About This Site, CMS Links, How to..., Reference Materials, Contact Us, and Logout. Below this, the main content area has a white background. On the left, the heading 'WCMSAP' is followed by a paragraph explaining the system's purpose for entering and tracking Workers' Compensation Medicare Set-Aside (WCMSA) proposals. Below this paragraph is a section titled 'I'd like to...' with three links: 'Create a New Case', 'Case Lookup', and 'View Alerts'. On the right side, there are two boxes. The top box is titled 'QUICK HELP' and contains a link 'Help About This Page'. The bottom box is titled 'Account Settings' and contains three links: 'Update Account Information', 'Designee Maintenance', and 'View Account Activity'. At the bottom of the page is a blue footer bar with links: Privacy Policy, User Agreement, and Adobe Acrobat.

Home About This Site CMS Links How to... Reference Materials Contact Us Logout

WCMSAP

The WCMSAP provides an interface for entry of Workers' Compensation Medicare Set-Aside (WCMSA) proposals. You may use this site to enter the case information directly. The site also provides the ability to track submitted cases and the statuses without inquiry to the BCRC or CMS. If the account is a Representative account, you also have the ability to view information for your WCMSA(s) and submit an annual attestation via WCMSAP for all eligible WCMSAs where you are the Identified administrator. Case Lookup and View Alert functions are also available. Click the desired link below to perform that function.

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

I'd like to...

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

QUICK HELP

- [Help About This Page](#)

Account Settings

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

Privacy Policy User Agreement Adobe Acrobat

Slide notes

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

Slide 15 - of 28 Using Login ID

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

Case Lookup

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

QUICK HELP
[Help About This Page](#)

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

Helpful Hints:

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

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

Enter one of the following:

Case Control Number:

Medicare ID: OR SSN: --

Date Range:

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

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

Slide notes

From the Case lookup page, users may access cases that are associated with their Login ID using various user-specified criteria. The fields on this page can be used to narrow search results.

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

Slide 16 - of 28 Optional Fields

[Home](#) [About This Site](#) [CMS Links](#) [How to...](#) [Motorcycle Materials](#) [Contact Us](#) [Logout](#)

Case Lookup

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

QUICK HELP
[Help About This Page](#)

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

Helpful Hints:

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

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

Enter one of the following:

Case Control Number:

Medicare ID: OR SSN: --

Date Range:

Case Creation Date Range:

From Date: / / To Date: / /

Case Submission Date Range:

From Date: / / To Date: / /

Slide notes

The remaining fields are all optional but can also be used to narrow down the search results.

Please see the Case Lookup CBT for more information on the Case Lookup function.

The screenshot shows the WCMSAP website. At the top is a dark blue navigation bar with links: Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Logout. Below this, on the right, is a 'QUICK HELP' box with a link 'Help About This Page'. The main content area has the title 'WCMSAP' and a paragraph explaining the system's purpose: 'The WCMSAP provides an interface for entry of Workers' Compensation Medicare Set-Aside (WCMSA) proposals. You may use this site to enter the case information directly. The site also provides the ability to track submitted cases and the statuses without inquiry to the BCRC or CMS. If the account is a Representative account, you also have the ability to view information for your WCMSA(s) and submit an annual attestation via WCMSAP for all eligible WCMSAs where you are the identified administrator. Case Lookup and View Alert functions are also available. Click the desired link below to perform that function.' Below this paragraph is another paragraph: 'You may modify Account Settings by clicking the appropriate link under the Account Settings list.' To the right of this text is an 'Account Settings' box containing three links: 'Update Account Information', 'Designee Maintenance', and 'View Account Activity'. Below the main text, there is a section titled 'I'd like to...' with three links: 'Create a New Case', 'Case Lookup', and 'View Alerts'. At the bottom of the page is a dark blue footer bar with links: Privacy Policy, User Agreement, and Adobe Acrobat.

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

QUICK HELP
[Help About This Page](#)

WCMSAP

The WCMSAP provides an interface for entry of Workers' Compensation Medicare Set-Aside (WCMSA) proposals. You may use this site to enter the case information directly. The site also provides the ability to track submitted cases and the statuses without inquiry to the BCRC or CMS. If the account is a Representative account, you also have the ability to view information for your WCMSA(s) and submit an annual attestation via WCMSAP for all eligible WCMSAs where you are the identified administrator. Case Lookup and View Alert functions are also available. Click the desired link below to perform that function.

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

I'd like to...

[Create a New Case](#)

[Case Lookup](#)

[View Alerts](#)

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

Account Settings

[Update Account Information](#)

[Designee Maintenance](#)

[View Account Activity](#)

Slide notes

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

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

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

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

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

Slide 18 - of 28 Alerts Page Information

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

Alerts

7 items found, displaying all items.

QUICK HELP
[Help About This Page](#)

This page lists all alerts that correspond to the Account ID(s) you are registered under. You can select a notification to view by clicking on the Alert ID. The data is sorted by Alert Creation Date (descending) and Case Number (ascending).

Enter the search criteria in the provided fields and click 'Search.' Selecting 'Cancel' will return you to the Home page. If a date range is not provided, the application will present alerts for the most current 60 days.

Case Control Number:

Alert Status: Not Archived ▼

Medicare ID: OR SSN: - -

Date Range:

Alert Creation Date Range:
 From Date / / To Date: / /

☒ Order by Date, then Case Number
☐ Order by Case Number, then Date

Alert ID	Alert Creation Date	Alert Type	Case Number	Creator	Status	Medicare ID/SSN	Patient Name
163	02/14/2011	Closed	WC#####	WCSA	Not Read	*****2013A	FIRST LAST
161	02/14/2011	Completed	WC#####	WCSA	Read	*****8100	FIRST LAST

Slide notes

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

They may click the Alert ID number link which will display the specific alert or letter on the Alert Detail page. They may also click a Case Number link which will display all alerts for the selected case on the Alert Listing page. Please see the Alerts CBT for additional information on the various alerts that may be received for a case on the WCMSAP.



Slide notes

When beneficiaries access their account from MyMedicare.gov., they will be taken directly to the Case Documentation Page.

Slide 20 - of 28 Attestation-Case Documentation

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

Case Documentation

Smith, John Medicare ID: 123456789A Case ID: XXXXXX

QUICK HELP
[Help About this Page](#)

This page shows documentation submitted for the case you selected. Click on the document title to read or print the document. Click on the column title to sort the documents by that column. You can search for documents by entering search criteria and clicking the "Search" button. You can also view your WCMSA balance or submit your yearly attestation by clicking the "WCMSA Attestation Information" button.

From Date: / / (MM/DD/CCYY) To Date: / / (MM/DD/CCYY)

No documents were found meeting the entered date criteria. Please try another search by changing the entered dates and selecting the Search button or select the Clear button to retrieve all available documents associated to the selected Case Number.

There are no documents to view for this case at this time.

Document Category	Creation Date
Life Care Plan	01/06/2008
Reled Age Information or Life Expectancy	11/06/2009
Submitter Letter or Other Summary Documents	01/06/2010
Proposed/Final Settlement Agreement or Court Order	01/06/2010
Payment History	01/06/2010
Proposed/Final Settlement Agreement or Court Order	01/06/2010
Consent Form	12/20/2010
Payment History	01/06/2011
Life Care Plan	01/19/2011
Payment History	01/06/2012

Slide notes

From this page, you can view any documentation that has been submitted for your case. If you have multiple cases, you can click on the Case Listing button to select another case. You also have a link to the WCMSA Attestation Information where you can view your WCMSA balance or submit your yearly attestation

Slide 21 - of 28 Alerts Page Information

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

Case Documentation

Smith, John Medicare ID: 123456789A Case ID: XXXXXX

QUICK HELP
[Help About this Page](#)

This page shows documentation submitted for the case you selected. Click on the document title to read or print the document. Click on the column title to sort the documents by that column. You can search for documents by entering search criteria and clicking the "Search" button. You can also view your WCMSA balance or submit your yearly attestation by clicking the "WCMSA Attestation Information" button.

From Date: / / (MM/DD/CCYY) To Date: / / (MM/DD/CCYY)

No documents were found meeting the entered date criteria. Please try another search by changing the entered dates and selecting the Search button or select the Clear button to retrieve all available documents associated to the selected Case Number.

There are no documents to view for this case at this time.

Document Category	Creation Date
Life Care Plan	01/06/2008
Reled Age Information or Life Expectancy	11/06/2009
Submitter Letter or Other Summary Documents	01/06/2010
Proposed/Final Settlement Agreement or Court Order	01/06/2010
Payment History	01/06/2010
Proposed/Final Settlement Agreement or Court Order	01/06/2010
Consent Form	12/20/2010
Payment History	01/06/2011
Life Care Plan	01/19/2011
Payment History	01/06/2012

Slide notes

This page Displays all documentation submitted for the selected case/ Select the case link to view the document.

To select another case, use the Case Listing button to view your case list.

You can also use the WCMSA Attestation Information to view your WCMSA balance or submit your yearly attestation.

Slide 22 - of 28 Attestation- Case Link

[Skip Navigation](#)

HomeAbout This SiteCMS LinksHow To...Reference MaterialsContact UsLogoff

Case Listing

Smith, John

QUICK HELP
[Help About This Page](#)

This page lists all cases submitted into the Workers' Compensation Medicare Set-Aside Web Portal that are associated with you. If documentation is available to view for a case, you can click on the Case Number to see documents submitted for the case. Clicking "Logoff" will sign you out of this session.

Case Number	Date of Injury	Case Status	Case Location	Submission Date
WC123456	01/19/2010	Received	WCRC	02/23/2010
WC798654	11/17/2009	Received	WCRC	12/05/2009

Slide notes

Clicking the Case Listing link will take you to the Case Listing Page where a list of all cases submitted into WCMSAP will appear if they are associated to you in MyMedicare.gov. To go back to the documentation page and view the documents for that case, click the case number link.

Slide 23 - of 28 Attestation Page

WCMSA Account Balance and Attestation Submission

QUICK HELP
[Help About This Page](#)

Every year, no later than 30 days after the anniversary date of your Worker's Compensation settlement, the administrator of the WCMSA funds must send an attestation to Medicare's Benefits Coordination Recovery Center (BCRC) stating that the funds in the account have been used correctly. Individuals who have a CMS-approved WCMSA as part of a workers' compensation settlement agreement may only use the funds in the WCMSA account to pay for Medicare-covered medical services and Medicare-covered prescription drug expenses that are related to their workers' compensation injury, illness, or disease.

To submit your attestation, review the information below, select the appropriate attestation statement, enter the applicable monies spent, and select the attestation checkbox. If you want to submit a copy of your accounting records, click the **Upload Documentation** link to upload this document. Once you are ready to submit your information, click **Submit Attestation**. Click **View Attestations** to view attestations previously submitted on the WCMSAP. Click **Cancel** if you do NOT wish to submit your attestations at this time.

Please Note: If the anniversary date for the current payout period has passed, the **Current Balance** will include the next payout amount.

Case ID: WC123456 Medicare ID: 123456A Name: GDIT Corp Date of Injury: 4/12/2019
 Total MCA: \$123.00 Settlement Date: 4/12/2010 Payout Method: Structured Annuity Initial Deposit: \$2.34
 Current Balance: \$2.00 Anniversary Date: 1/1/2019 No. of Years: 2 Payout Schedule:

Payment	Amount	Payment Date
1	\$633.33	01/1/2017
2	\$633.33	01/1/2018

I, the undersigned, attest that I have a **structured annuity** WCMSA and have:

☐ Used the annual monies from the WCMSA account for the period of [] / [] / [] to [] / [] / []

☐ Used the monies from the WCMSA account for the period of [] / [] / [] to [] / [] / []

☐ **EXHAUSTED** the annual monies (and any applicable carry-over from previous years) in the WCMSA account for the period of [] / [] / [] to [] / [] / []

☐ **COMPLETELY EXHAUSTED** all monies in the WCMSA account for the period of [] / [] / [] to [] / [] / []

To pay for the following:

Medical expenses: \$ [] - []

Prescription drug expenses: \$ [] - []

Taxes paid on interest earned: \$ [] - []

The interest earned on these funds was: \$ [] - []

☐ I acknowledge and understand that failure to follow any of the Medicare requirements for the use of this money will be regarded as failure to reasonably recognize Medicare's interests and that Medicare will deny coverage for all medical treatments and prescription drug expenses due to my work-related injuries up to the total workers' compensation settlement amount.

CM 3 reserves the right to audit how you spend the funds in your WCMSA account. Therefore, CM 3 recommends that you retain your WCMSA records for a period of seven (7) years.

To upload supporting documentation, click the **Upload Documentation** link. [Upload Documentation](#)

Documentation uploaded:
 WCMSA Account Records.pdf 2010-01-20 [Delete](#)

[Submit Attestation](#) [View Attestations](#) [Cancel](#)

[Privacy Policy](#) [User Agreement](#) [Adverse Action](#)

Slide notes

If you select the WCMSA Attestation Information from the Case Information screen, you will be taken to the WCMSA Account Balance and Attestation Submission page.

Every year, no later than 30 days after the anniversary date of your Worker's Compensation settlement, the administrator of the WCMSA funds must send an attestation to Medicare's Benefits Coordination Recovery Center (BCRC) stating that the funds in the account have been used correctly.

To submit your attestation, review the information below, select the appropriate attestation statement, enter the applicable monies spent, and select the attestation checkbox. If you want to submit a copy of your accounting records, click the Upload Documentation link to upload this document. Once you are ready to submit your information, click Submit Attestation. Click View Attestations to view attestations previously submitted on the WCMSAP. Click Cancel if you do NOT wish to submit your attestation at this time.



The screenshot displays the 'Workers' Compensation Set-Aside Web Portal' with the CMS logo on the left and the COB&R logo on the right. A navigation bar at the top includes links for Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Logoff, along with a 'Skip Navigation' link. The main heading is 'WCMSA Attestation Submission Verification'. A 'QUICK HELP' button with a link to 'Help About This Page' is located on the right. The main content area contains the following text: 'Please review the WCMSA attestation information below to verify that this is correct for Case Number: WC123456. If the information is correct, click **Continue** to submit your attestation. Click **Previous** to return to the previous page to make changes. Click **Cancel** to cancel your attestation submission.'

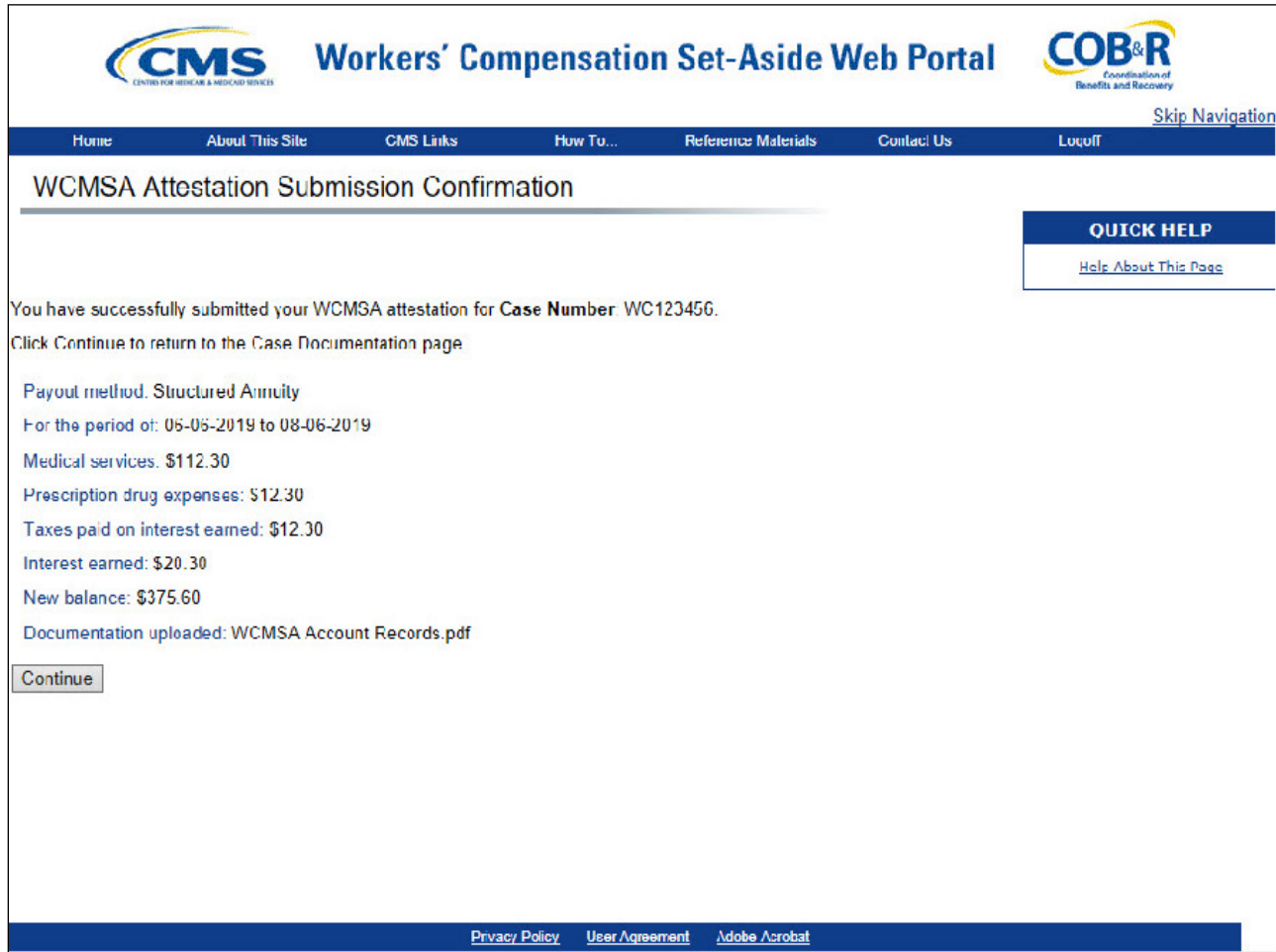
Payout method: Structured Annuity
For the period of: 06-06-2019 to 08-06-2019
Medical services: \$112.30
Prescription drug expenses: \$12.30
Taxes paid on interest earned: \$12.30
Interest earned: \$20.30
New balance: \$375.60
Documentation uploaded: WCMSA Account Records.pdf

At the bottom of the form are three buttons: 'Previous', 'Continue', and 'Cancel'. A footer bar at the very bottom contains links for 'Privacy Policy', 'User Agreement', and 'Adobe Acrobat'.

Slide notes

The information entered will display on the Attestation Submission Verification page. Use the previous button to return to the form and make any needed changes and the continue button to proceed to the confirmation page. If you wish to cancel and return to the Case Listing Page, click cancel.

Slide 25 - of 28 Attestation Confirmation



The screenshot displays the 'Workers' Compensation Set-Aside Web Portal' with logos for CMS (Center for Medicare & Medicaid Services) and COB&R (Coordination of Benefits and Recovery). A navigation bar includes links for Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Logout, along with a 'Skip Navigation' link. The main heading is 'WCMSA Attestation Submission Confirmation'. A 'QUICK HELP' box contains a link to 'Help About This Page'. The confirmation message states: 'You have successfully submitted your WCMSA attestation for Case Number: WC123456. Click Continue to return to the Case Documentation page.' Below this, a list of financial details is provided: 'Payout method: Structured Annuity', 'For the period of: 06-06-2019 to 08-06-2019', 'Medical services: \$112.30', 'Prescription drug expenses: \$12.30', 'Taxes paid on interest earned: \$12.30', 'Interest earned: \$20.30', and 'New balance: \$375.60'. It also notes 'Documentation uploaded: WCMSA Account Records.pdf'. A 'Continue' button is located at the bottom left of the main content area. The footer contains links for 'Privacy Policy', 'User Agreement', and 'Adobe Acrobat'.

WCMSA Attestation Submission Confirmation

QUICK HELP
[Help About This Page](#)

You have successfully submitted your WCMSA attestation for **Case Number: WC123456**.
Click **Continue** to return to the **Case Documentation** page.

Payout method: Structured Annuity
For the period of: 06-06-2019 to 08-06-2019
Medical services: \$112.30
Prescription drug expenses: \$12.30
Taxes paid on interest earned: \$12.30
Interest earned: \$20.30
New balance: \$375.60
Documentation uploaded: WCMSA Account Records.pdf

[Continue](#)

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

Slide notes

When continuing, the Attestation Submission Confirmation page will appear confirming that your attestation was successfully submitted. Continue will return you back to the WCMSA Account Balance and Attestation Submission page.

Course Summary

You are now able to:

- Navigate the WCMSAP
- Discuss menu options within the WCMSAP
- Complete the annual attestation



Slide notes

You are now able to:

- Navigate the WCMSAP
- Discuss menu options within the WCMSAP
- Complete the annual attestation



You have completed the Application Overview course.
The information in this course can be referenced by
using the document at the link below.
[https://www.cob.cms.hhs.gov/WCMSA/assets/wcmsa/
userManual/WCMSAUserManual.pdf](https://www.cob.cms.hhs.gov/WCMSA/assets/wcmsa/userManual/WCMSAUserManual.pdf)

**Slide notes**

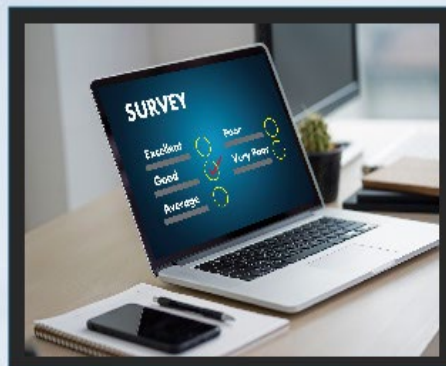
You have completed the Application Overview course. The information in this course can be referenced by using the document at the link below.

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



If you have any questions or feedback on this material,
please go to the following URL:

<https://www.surveymonkey.com/s/WCMSAPTraining>.



Slide notes

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<https://www.surveymonkey.com/s/WCMSAPTraining> .