Application Overview

Slide 1 – of Application Overview

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
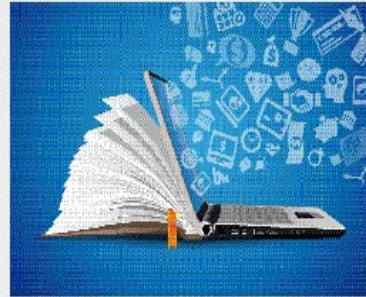
Slide notes

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

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 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

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 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

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

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 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 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 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

Slide notes

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

The Professional Administrator option means that a professional entity will administer and account for the WCMSA 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 WCMSAP case creation, see the Case Submission CBT.

Slide 14 - of 28 Case Look Up Function

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 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

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.

Slide 17 - of 28 Viewing Alerts

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

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 19 - of 28 WCSA Attestation

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

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

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 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

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.

Slide 24 - of 28 Attestation Verification

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

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.

Slide notes

You are now able to:

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

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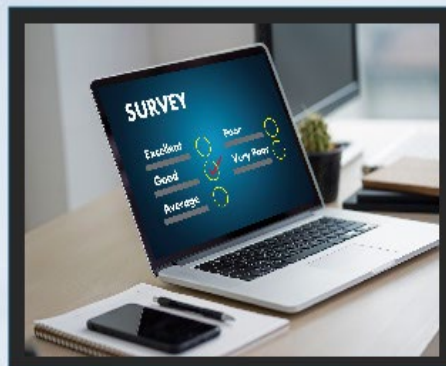
You have completed the Application Overview course. The information in this course can be referenced by using the document at the link below.

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

Slide notes

If you have any questions or feedback on this material, please go to the following URL: https://www.surveymonkey.com/s/WCMSAPTraining .