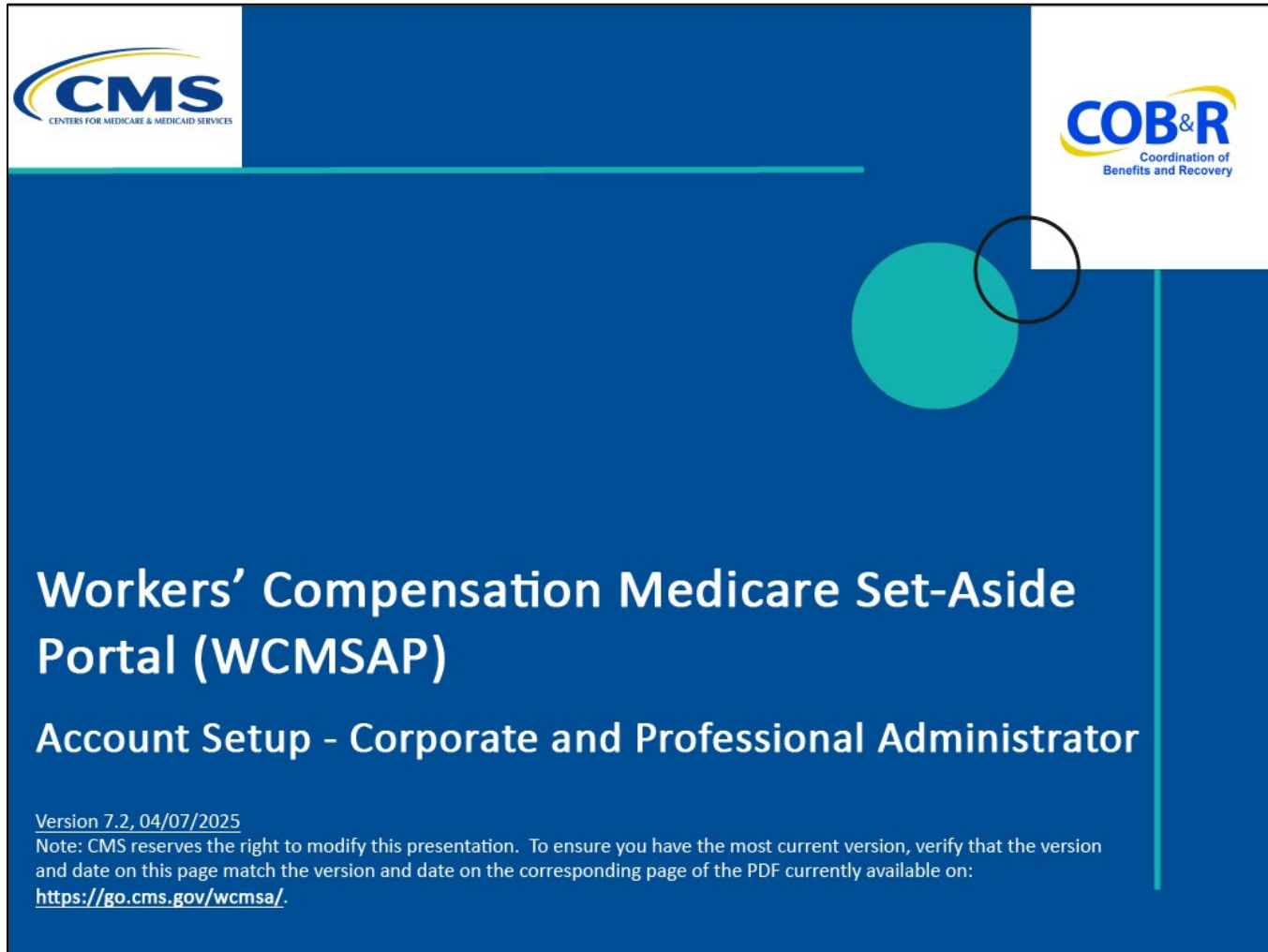


Account Setup – Corporate and Professional Administrator Accounts

Slide 1 of 24 - Account Setup – Corporate and Professional Administrator Accounts



Workers' Compensation Medicare Set-Aside Portal (WCMSAP)

Account Setup - Corporate and Professional Administrator

Version 7.2, 04/07/2025

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) Account Setup course.

Note: This module is intended for those entities who will register for a corporate or professional administrator account. A corporate account and professional administrator indicate that the submitter is registering as a corporate entity with an Employer Identification Number (EIN) and will be regularly submitting WCMSA requests.

Slide 2 of 24 - Disclaimer

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://www.cms.gov/medicare/coordination-benefits-recovery/workers-comp-set-aside-arrangements/portal>.

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: [WCMSAP Website](https://www.cms.gov/medicare/coordination-benefits-recovery/workers-comp-set-aside-arrangements/portal).

Slide 3 of 24 - Course Overview

Course Overview

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

- Complete Account setup as a Corporate Entity
- Conduct Account Setup as a Professional Administrator
- Explain Next Steps once account setup is complete



Slide notes

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

- Complete Account setup as a Corporate Entity,
- Conduct Account setup as a Professional Entity, and
- Explain the next steps once account setup is complete.

Slide 4 of 24 - Getting Started Cont.

Getting Started

- Professional Administrator and Corporate entity must identify Account Manager
- Account Manager completes Account Setup as long as:
 - Corporate entity has completed New Registration - PIN Request step where the Account ID will be provided upon completion
 - Authorized Representative has received an email from the Benefits Coordination and Recovery Center (BCRC) containing:
 - Personal Identification Number (PIN)

***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

Slide notes

To begin, the professional administrator and 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 an email from the Benefits Coordination and Recovery Center (BCRC) containing the Personal Identification Number (PIN) and has been provided the Account ID/Submitter ID recorded from the WCMSA Registration Completed Successfully Page.

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

***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

Slide 5 of 24 - Getting Started Cont.

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.

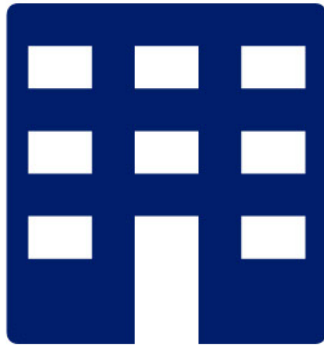
The Account Manager may choose to manage the entire account or may invite other company employees to assist in this process.

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 24 - Corporate & Professional Administrator

Corporate Account and Professional Administrators




The Account Setup process for corporate and professional administrators is the same

Slide notes

The Account Setup process for corporate and professional administrators is the same.

Slide 7 of 24 - Login Warning Page

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. This system is provided for Government-authorized use only. Personal use of this system is prohibited. This system is provided for Government-authorized use only. By using this system, you agree to the terms and conditions of use. *You have no reasonable expectation of privacy regarding any communication or data transiting or stored on this system.

In order to perform the WCMSAP Account Setup, the Account Manager must go to the WCMSAP Website found at the following URL:

<https://www.cob.cms.hhs.gov/WCMSA/>

*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.

[Decline](#)

Slide notes

In order to perform the WCMSAP Account Setup, the Account Manager must go to the WCMSAP Website found at the following URL: [WCMSAP Website](https://www.cob.cms.hhs.gov/WCMSA/).

You must review the Login Warning 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 8 of 24 - Login/Welcome to the WCMSAP Page

The screenshot displays the 'Welcome to the WCMSAP' page. At the top is a navigation bar with links: 'About This Site', 'CMS Links', 'How To...', 'Reference Materials', and 'Contact Us'. The main heading is 'Welcome to the WCMSAP'. Below it, a paragraph explains the site's purpose for Workers' Compensation Medicare Set-Aside Arrangements (WCMSA) proposals. To the right is a 'Sign into your account' box with fields for 'User Name' and 'Password', each with a 'Forgot' link, and 'Login' and 'Clear' buttons. Further down, a 'WCMSAP Message' section provides information for Medicare beneficiaries. Below that, a 'GETTING STARTED' section refers to a 'How To' menu. At the bottom, a two-step process is shown: 'STEP 1' with a 'New Registration' button and 'STEP 2' with an 'Account Setup' button. The 'Account Setup' button is highlighted with a red box, and a note below it states '(Account ID and PIN required)'.

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

Welcome to the WCMSAP

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

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

Sign into your account

User Name:

[Forgot ID](#)

Password:

[Forgot Password](#)

WCMSAP Message

Attention Medicare Beneficiaries: If you are looking to submit an annual attestation electronically for your self-administered Medicare Set Aside (MSA), please be aware that you may do so by registering for and logging in to your Medicare.gov account. Using your Medicare.gov account connects you to the WCMSAP, making registration for a WCMSAP account unnecessary. Additional information on submitting attestations can be found in the Self-Administration Toolkit for WCMSAs.

GETTING STARTED

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

STEP 1
New Registration ➡

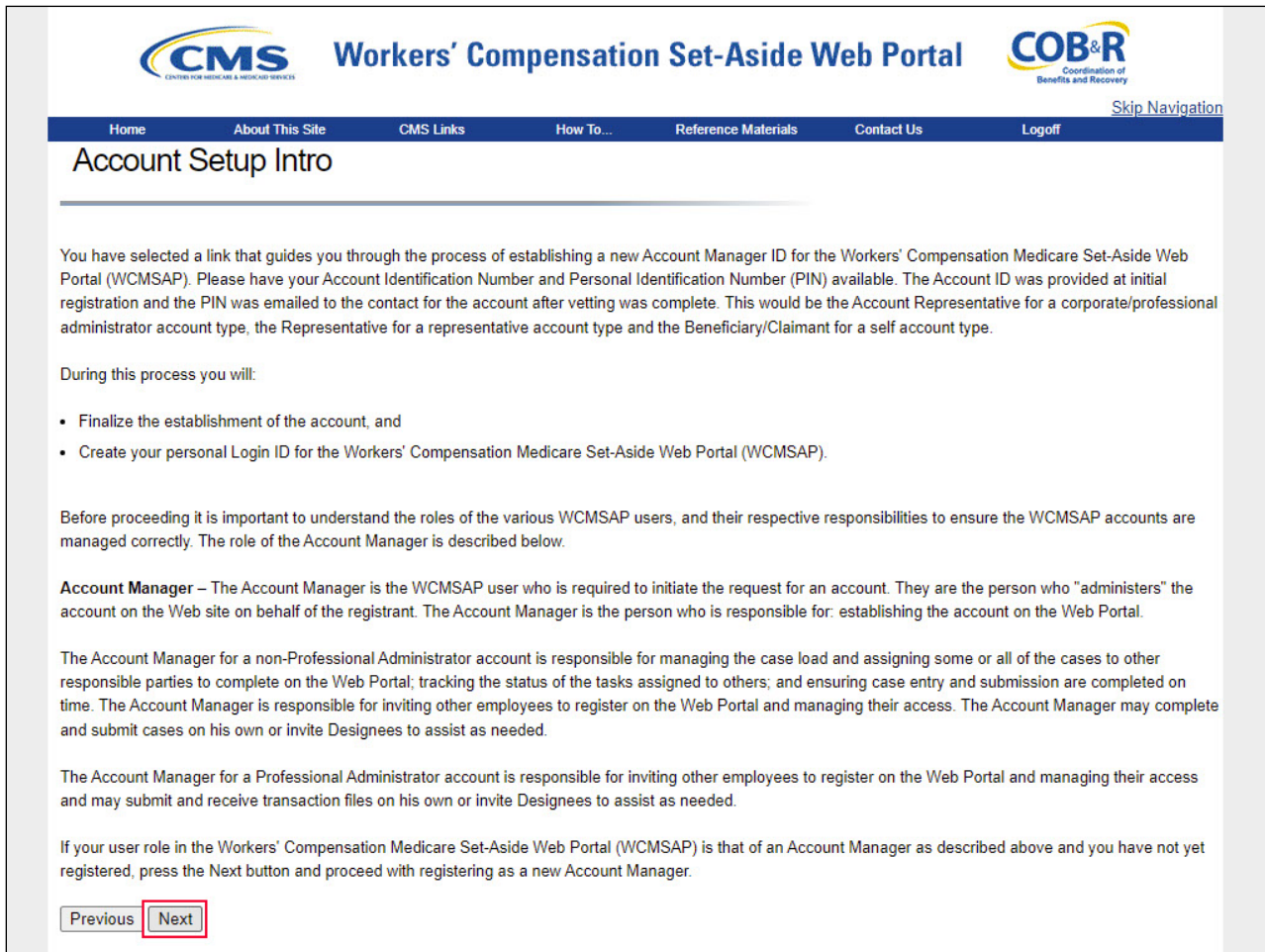
STEP 2
Account Setup ➡
(Account ID and PIN required)

Slide notes

Once you have clicked on the I Accept link, you will be brought to the Login/Welcome to the WCMSAP page. To begin this process, your designated Account Manager must click the Account Setup button.

Note: A new link, "Medicare.gov" has been added to the CMS Links dropdown menu and the "General Medicare" link has been renamed to "CMS.gov".

Slide 9 of 24 - Account Setup Intro Page



The screenshot shows the 'Account Setup Intro' page of the Workers' Compensation Set-Aside Web Portal. The page header includes the CMS logo (Center for Medicare & Medicaid Services), the portal title 'Workers' Compensation Set-Aside Web Portal', and the COB&R logo (Coordination of Benefits and Recovery). A navigation bar contains links: Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Logoff. A 'Skip Navigation' link is also present. The main heading is 'Account Setup Intro'. The text explains that the user has selected a link to establish a new Account Manager ID for the WCMSAP. It states that the Account ID was provided at initial registration and the PIN was emailed to the contact. It defines the Account Representative for corporate/professional administrator account types, the Representative for representative account types, and the Beneficiary/Claimant for self account types. It then lists the steps during the process: finalizing the establishment of the account and creating a personal Login ID. It emphasizes understanding the roles of various WCMSAP users. It defines the Account Manager as the user who initiates the request and administers the account. It describes the responsibilities of the Account Manager for non-Professional Administrator accounts (managing case load, assigning tasks, ensuring case entry and submission) and for Professional Administrator accounts (inviting other employees to register and managing their access). It instructs the user to click the 'Next' button if they are an Account Manager and have not yet registered. At the bottom, there are 'Previous' and 'Next' buttons, with the 'Next' button highlighted by a red box.

CMS **Workers' Compensation Set-Aside Web Portal** **COB&R**
Center for Medicare & Medicaid Services Coordination of Benefits and Recovery

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

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 Medicare Set-Aside Web Portal (WCMSAP). Please have your Account Identification Number and Personal Identification Number (PIN) available. The Account ID was provided at initial registration and the PIN was emailed to the contact for the account after vetting was complete. This would be the Account Representative for a corporate/professional administrator account type, the Representative for a representative account type and the Beneficiary/Claimant for a self account type.

During this process you will:

- Finalize the establishment of the account, and
- Create your personal Login ID for the Workers' Compensation Medicare 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 WCMSAP accounts are managed correctly. The role of the Account Manager is described below.

Account Manager – The Account Manager is the WCMSAP user who is required to initiate the request for an account. They are the person who "administers" the account on the Web site on behalf of the registrant. The Account Manager is the person who is responsible for: establishing the account on the Web Portal.

The Account Manager for a non-Professional Administrator account is responsible for managing the case load and assigning some or all of the cases to other responsible parties to complete on the Web Portal; tracking the status of the tasks assigned to others; and ensuring case entry and submission are completed on time. The Account Manager is responsible for inviting other employees to register on the Web Portal and managing their access. The Account Manager may complete and submit cases on his own or invite Designees to assist as needed.

The Account Manager for a Professional Administrator account is responsible for inviting other employees to register on the Web Portal and managing their access and may submit and receive transaction files on his own or invite Designees to assist as needed.

If your user role in the Workers' Compensation Medicare Set-Aside Web Portal (WCMSAP) is that of an Account Manager as described above and you have not yet registered, press the Next button and proceed with registering as a new Account Manager.

Previous **Next**

Slide notes

The Account Setup Intro page will appear. This page describes the Account Setup process and informs you of your duties as the Account Manager. Read the introduction, then click Next to continue with the Account Setup page.

Slide 10 of 24 - Account Setup Page

The screenshot shows the 'Account Setup' page of the 'Workers' Compensation Set-Aside Web Portal'. The page header includes the CMS logo (Centers for Medicare & Medicaid Services) and the COB&R logo (Coordination of Benefits and Recovery). 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 heading is 'Account Setup'. Below it, a paragraph states: 'Please enter your Account Identification Number (Account ID) and Personal Identification Number (PIN). The Account ID was provided at initial registration and the PIN was emailed to the contact for the account after vetting was complete.' A 'QUICK HELP' box on the right contains a link 'Help About This Page'. Another paragraph states: 'New users must go through the process of creating a Login ID and Password.' A note says: 'An asterisk (*) indicates a required field.' The form fields are: 'Account ID: *' (text box), 'Personal Identification Number (PIN): *' (text box), 'Account Manager's E-mail Address: *' (text box), and 'Re-enter E-Mail Address: *' (text box). At the bottom of the form are 'Previous' and 'Next' buttons, with 'Next' highlighted by a red box. The footer contains links: 'CMS/HHS Vulnerability Disclosure Policy', 'Privacy Policy', 'User Agreement', and 'Adobe Acrobat'.

Slide notes

This page requires the Account Manager to enter the Account ID provided during the new registration. The PIN is included in the email sent to the corporate Authorized Representative.

The Account Manager's email address is also required in order to verify that he/she is an authorized user. When this page is completed, click Next to continue.

Slide 11 of 24 - System Validation

CMS **Workers' Compensation Set-Aside Web Portal** **COB&R**
Coordination of Benefits and Recovery

[Skip Navigation](#)

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

Account Setup

Please enter your Account Identification Number (Account ID) and Personal Identification Number (PIN). The Account ID was provided at initial registration and the PIN was emailed to the contact for the account after vetting was complete.

New users must go through the process of creating a Login ID and Password.

An asterisk (*) indicates a required field.

Account ID: *

Personal Identification Number (PIN): *

Account Manager's E-mail Address: *

Re-enter E-Mail Address: *

[Help About This Page](#)

[CMS/HHS Vulnerability Disclosure Policy](#) [Privacy Policy](#) [User Agreement](#) [Adobe Acrobat](#)

Slide notes

The system will also validate your email 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.

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 12 of 24 - Account Setup - Company/Professional Information Page

The screenshot shows the 'Account Setup - Company Information' page of the Workers' Compensation Set-Aside Web Portal. The page features a header with the CMS logo, the portal title, and the COB&R logo. A navigation bar includes 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 divided into two columns: 'Corporate Information' and 'Account Representative Information'. The 'Corporate Information' column displays the Employer Identification Number (EIN) as 123456789 and the Corporation Name as ABC Company. The 'Account Representative Information' column displays the First Name as Jane, MI as A, Last Name as Smith, and Phone as 410-832-8350 ext. 9877. Below these sections is the 'Business Mailing Address' section, which includes Address Line 1 (200 Test Avenue), Address Line 2 (Suite 2-B), City (Towson), State (Maryland), and Zip Code (21204-3276). At the bottom of the form are 'Previous' and 'Next' buttons, with the 'Next' button highlighted by a red rectangle. A footer bar contains links for 'CMS/HHS Vulnerability Disclosure Policy', 'Privacy Policy', 'User Agreement', and 'Adobe Acrobat'.

Workers' Compensation Set-Aside Web Portal

Account Setup - Company Information

Corporate Information

Employer Identification Number (EIN): 123456789
Corporation Name: ABC Company

Account Representative Information

First Name: Jane MI: A Last Name: Smith
Phone: 410-832-8350 ext. 9877

Business Mailing Address:

Address Line 1: 200 Test Avenue
Address Line 2: Suite 2-B
City: Towson
State: Maryland
Zip Code: 21204-3276

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

[Skip Navigation](#)

[Help About This Page](#)

[CMS/HHS Vulnerability Disclosure Policy](#) [Privacy Policy](#) [User Agreement](#) [Adobe Acrobat](#)

Slide notes

After the information has been verified by the system, the Account Setup - Company/Professional Information page will appear. This page displays information entered during the initial registration process. Click Next to continue.

Slide 13 of 24 - Account Manager Personal Information Page

CMS **Workers' Compensation Set-Aside Web Portal** **COB&R**
CENTERS FOR MEDICARE & MEDICAID SERVICES 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.

[View and print the agreement below](#)

☐ User Agreement

Slide notes

The Account Manager Personal Information page will appear. The information entered on this page is required for subsequent communications. All fields denoted by an asterisk (*) are required. The email Address field will be populated with the Account Manager email address that was entered on the Account Setup page. Enter the required personal information.

Slide 14 of 24 - User Agreement

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.

[View and print the agreement below](#)

User Agreement

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

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

Please check the following box:

☐ I accept the User Agreement and Privacy Policy above

Slide notes

When the Account Manager Personal 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 select the check box "I accept the User Agreement and Privacy Policy above" 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.

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).

Slide 15 of 24 - Login 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 24 passwords; and
- passwords cannot contain a reserved word.

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

Slide 16 of 24 - Account Manager Login Information Page

CMS **Workers' Compensation Set-Aside Web Portal** **COB&R**
CENTERS FOR MEDICARE & MEDICAID SERVICES Coordination of Benefits and Recovery

[Skip Navigation](#)

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

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.

- Login IDs must be 7 characters
- Login IDs must be unique within the system
- Login IDs must be in the format of AA999AA
 (first two alphabetic, next three numeric, last two alphabetic)
- 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 twenty four (24) passwords
- Password cannot contain reserved words listed on the help 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.

Slide notes

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

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.

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.


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.

Note: Additional security questions have been added to the Forgot Login ID and Forgot Password processes.

Slide 17 of 24 - Forgotten Password and ID

Forgotten Password and ID

- If a password or login is forgotten, a temporary password or your login ID will be sent to the email address given during registration.
 - Once you receive the email, return to the Welcome page and log in using your login ID and temporary password.
- 
- If you do not receive the email within 24 hours, please contact the EDI Help Desk at (646) 458-6740.
 - You can also contact EDI if you have forgotten your security questions.

Slide notes

If a password or login is forgotten, a temporary password or your login ID will be sent to the email address given during registration. Once you receive the email, return to the Welcome page and log in using your login ID and temporary password.

If you do not receive your email within 24 hours, please contact the EDI Help Desk at (646) 458-6740. You can also contact EDI if you have forgotten your security questions.

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

Slide 18 of 24 - Account Manager Summary Page

Account Manager Summary

Note: If the AM is a brand new AM, the text is below.

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.

Note: If the AM is an existing AM, the text is below.

Please review your personal and login information. 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.

Personal Information
First Name: Jane MI: A
Last Name: Smith
E-Mail Address: jsmith@abcassociates.com
Phone: 410- 832- 8350 ext. 9877

Login ID
Login ID: AA123bb

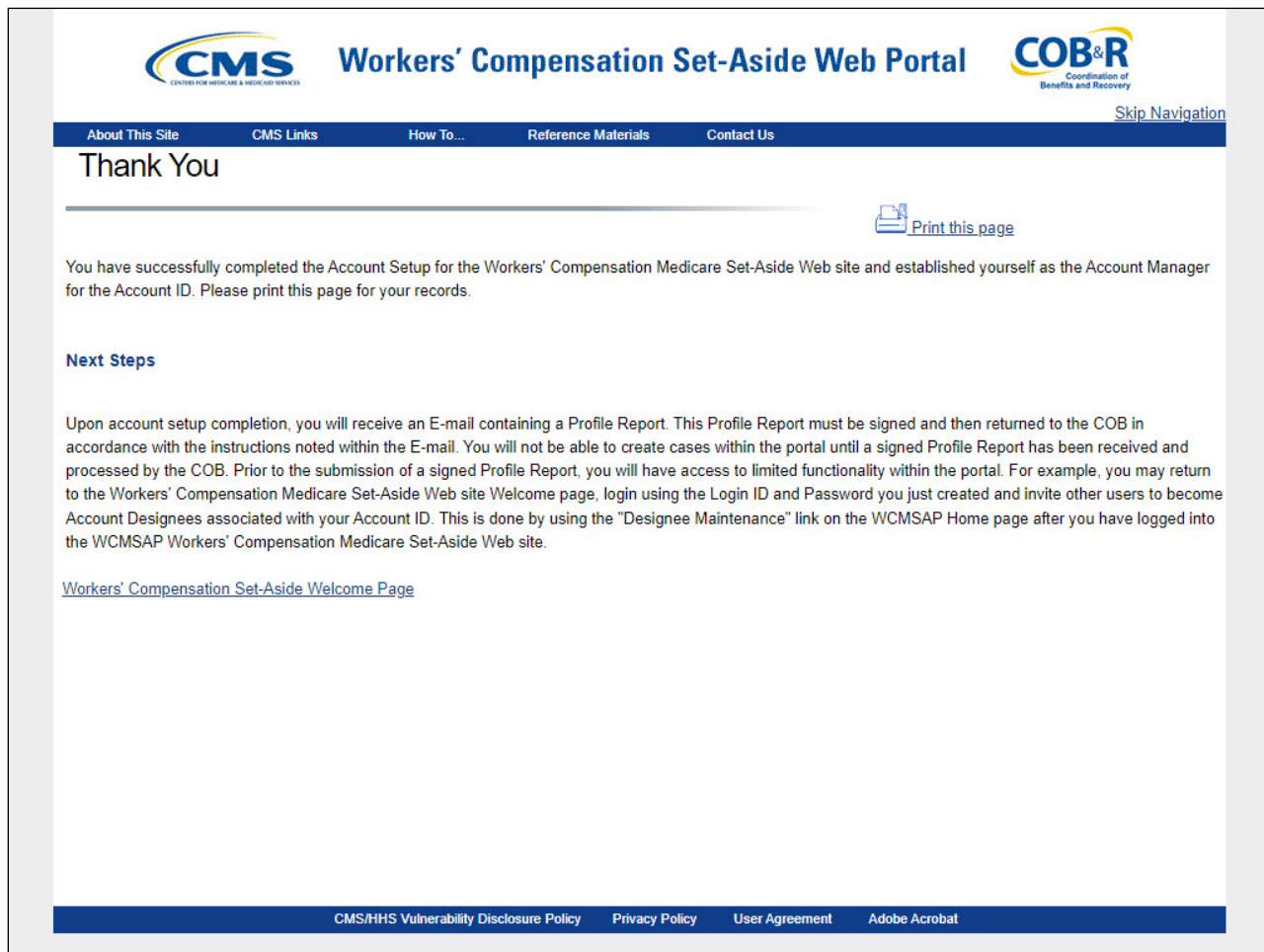
Mailing Address:
Address Line 1: 200 Test Avenue
Address Line 2: Suite 2-B
City: Towson
State: Maryland
Zip Code: 21204- 3276

QUICK HELP
[Help About This Page](#)

Slide notes

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

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 where you will Submit Account Setup.

Slide 19 of 24 - Thank You Page

The screenshot displays the 'Thank You' page of the Workers' Compensation Set-Aside Web Portal. The header includes the CMS logo (Center for Medicare & Medicaid Services), the portal title 'Workers' Compensation Set-Aside Web Portal', and the COB&R logo (Coordination of Benefits and Recovery). A navigation bar contains links: 'About This Site', 'CMS Links', 'How To...', 'Reference Materials', 'Contact Us', and 'Skip Navigation'. The main heading is 'Thank You'. Below it, a message states: '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.' A 'Print this page' link with a printer icon is provided. The 'Next Steps' section explains that an E-mail with a Profile Report will be received, which must be signed and returned to the COB. It also notes that users will have limited functionality until the report is processed. A link to the 'Workers' Compensation Set-Aside Welcome Page' is provided. The footer contains links for 'CMS/HHS Vulnerability Disclosure Policy', 'Privacy Policy', 'User Agreement', and 'Adobe Acrobat'.

Slide notes

The system will display a Thank You page with instructions for your next steps after successful Account Setup. Click the Workers' Compensation Medicare Set-Aside Welcome Page link to return to the Welcome page.

Slide 20 of 24 - Next Steps

Next Steps

- Account Setup complete
- Registered as Account Manager
 - Control administration of WCMSAP account
- Account Manager will receive Profile Report from BCRC via email
 - 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 set up 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 email, 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 has been 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.

Slide 21 of 24 - Next Steps Cont.

Next Steps

- Email 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 email, 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

**Slide notes**

Upon completion of all information for the Account Setup, an email notification will be sent to you and the Account Representative. The email 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 email, 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 22 of 24 - Course Summary

Course Summary

You should now be able to:



- Complete Account setup as a Corporate Entity
- Conduct Account Setup as a Professional Administrator
- Explain Next Steps once account setup is complete



Slide notes

You should now be able to:

- Complete Account setup as a Corporate Entity,
- Conduct Account setup as a Professional Entity, and
- Explain the next steps once account setup is complete.

Slide 23 of 24 - Conclusion

You have completed the WCMSAP Account Setup - Corporate and Professional Administrator 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 Account Setup – Corporate and Professional Administrator course. The information in this course can be referenced by using the document at the following link: [WCMSAP User Guide PDF](https://www.cob.cms.hhs.gov/WCMSA/assets/wcmsa/userManual/WCMSAUserManual.pdf).

Slide 24 of 24 - WCMSAP Training Survey



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

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

Slide notes

If you have any questions or feedback on this material, please go the following URL: [WCMSAP Training Survey](https://www.surveymonkey.com/s/WCMSAPTraining).