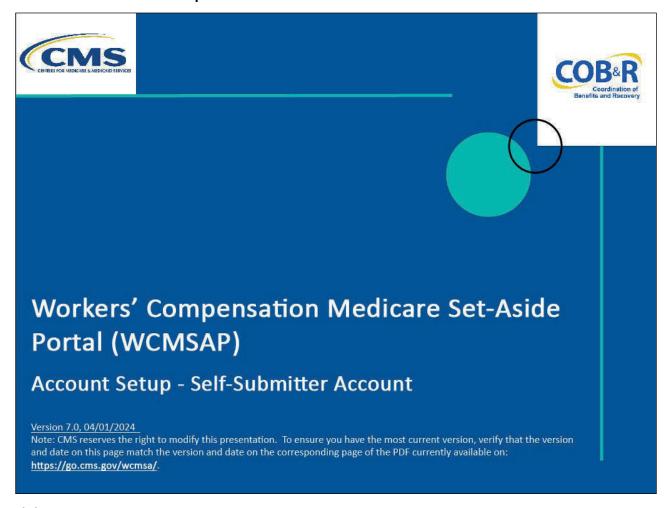## Account Setup - Self-Submitter

Slide 1 of 22 - Account Setup - Self-Submitter

Slide notes

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

This module is intended for self-submitter WCMSAP account users. A self-submitter is a WCMSA user who will submit a case for themselves.

A self-submitter must be a Medicare beneficiary or have a reasonable expectation of becoming a Medicare beneficiary within 30 months, who wish to submit a case for themselves.

Slide 2 of 22 - 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.

Slide 3 of 22 - Course Overview

Course Overview

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

- Explain how to setup a WCMSAP account as a Self-Submitter

- Establish a login identification (ID/Password) as a Self-Submitter

- Describe Next Steps once account setup is complete

Slide notes

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

- Explain how to setup a WCMSAP account as a Self-Submitter,
- Establish login identification (ID/Password) as a Self-Submitter, and
- Describe the next steps once account setup is complete.

Slide 4 of 22 - Getting Started

Getting Started

- Account Manager completes Account Setup
  - Self-Submitter is the Account Manager
- Begin Account Setup
  - After completion of New Registration - PIN Request step, you were provided with the Account ID
  - You receive an email from the BCRC, which includes the Personal Identification Number (PIN)
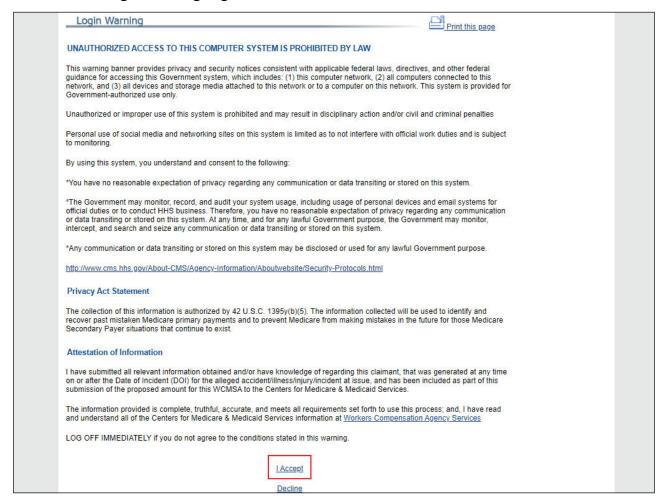
*Note: The contact address for the BCRC has changed. As a result, the system-generated Profile Report Email Notifications have been updated. The new address is:

Section 111 Reporting Program
P.O. Box 138892
Oklahoma City, OK 73113

Slide notes

The WCMSAP Account Setup must be completed by the Account Manager. If you are a self-submitter, you are the Account Manager.

Account Setup may begin after you have completed the New Registration step. During this step, you would have received an Account ID/Submitter ID on the WCMSA Registration Completed Successfully Page and then you should have received your Personal Identification Number (PIN) via email from the Benefits Coordination & Recovery Center (BCRC). The PIN and Account ID/Submitter ID are needed 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

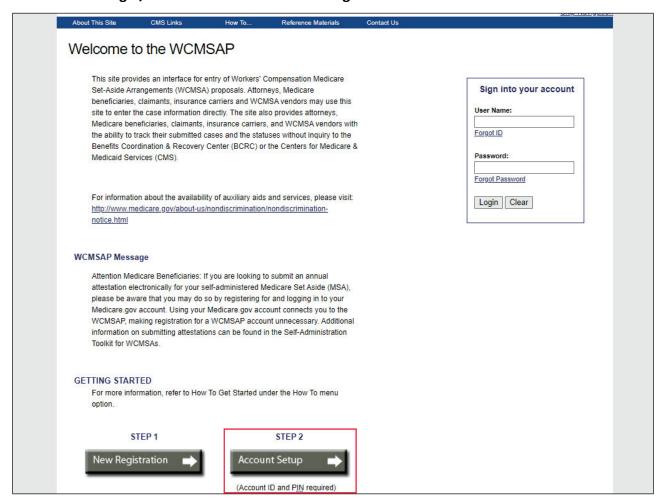**Slide 5 of 22 - Login Warning Page**

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.

You must review the Login Warning Page 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.
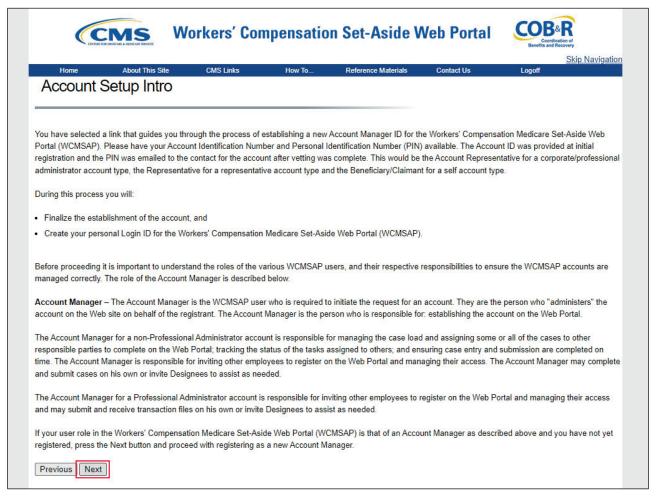
Slide 6 of 22 - Login/ Welcome to the WCMSAP Page

Slide notes

Once you have clicked the [I Accept] link, you will be brought to the Login/Welcome to the WCMSAP page.

To begin the next step in the registration process, click Account Setup.

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".

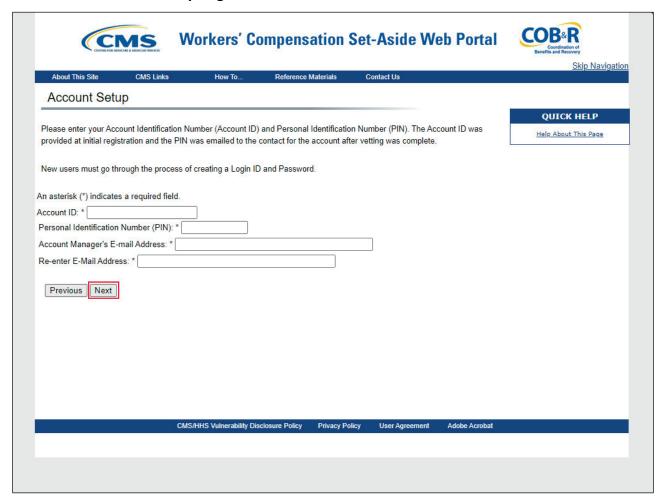**Slide 7 of 22 - Account Setup Introduction Page**

Slide notes

The Account Setup Introduction page will appear. This page describes the Account Setup process and your role as the Account Manager.

As the Account manager, you will establish and administer your WCMSAP account.

Account Managers can grant/add an Account Designee access to a case or revoke/remove an Account Designee's access to a case and/or an entire account.

Click Next to continue.

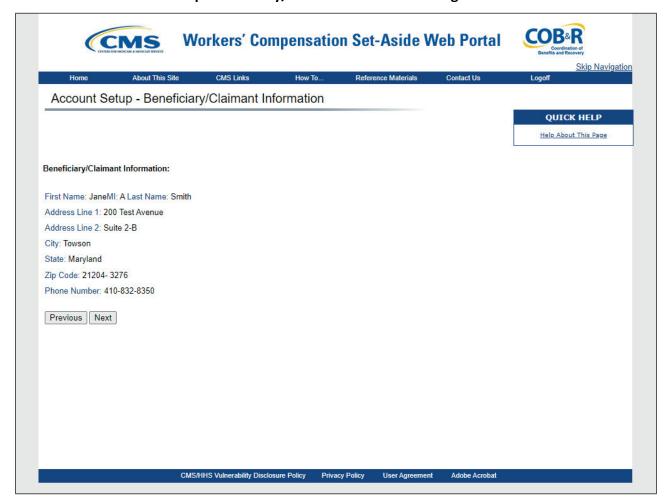**Slide 8 of 22- Account Setup Page**

Slide notes

The Account Setup page will appear. This page requires you to enter the Account ID, which was provided during the registration process, and PIN, that was emailed to you by the BCRC. Your email address is also required in order to verify that you are a registered user. Your email address must be entered twice.

Note: If the email address you enter is found in the system, you will be prohibited from continuing the account setup process.

When you have completed the Account Setup page, click Next to continue. The system will validate the Account ID and PIN. If the Account ID and/or PIN are invalid, the system will display an error message.

Slide 9 of 22 - Account Setup Beneficiary/Claimant Information Page
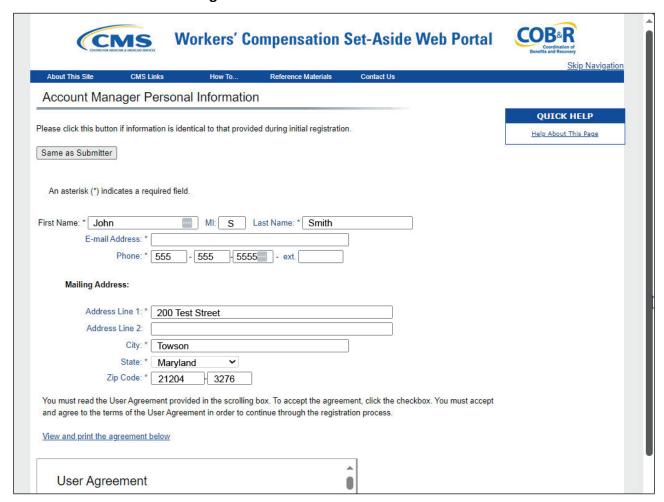

Slide notes

After all information has been verified by the system, the Account Setup -Beneficiary/Claimant Information page will appear. Information on this page will be pre-filled using information that you entered during the initial registration process.

Review the listed information. If any of the information is incorrect, contact an Electronic Data Interchange (EDI) Representative to have it corrected. Click Next to continue.
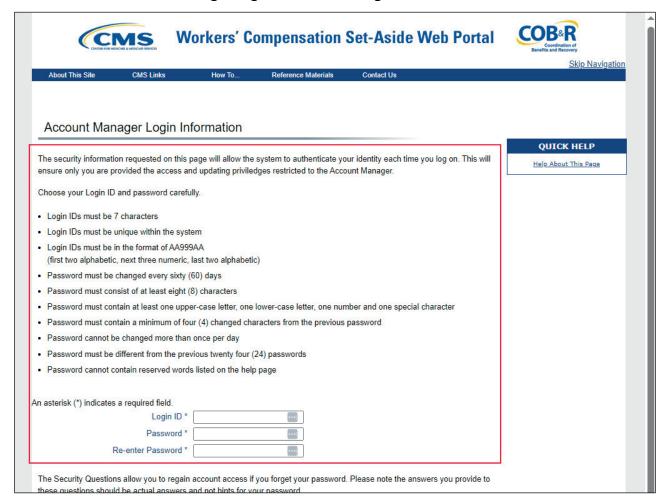
Slide 10 of 22 - Account Manager Personal Information

Slide notes

The Account Manager Personal Information page will appear. All fields will automatically be pre-filled for you with the contact information you entered earlier.

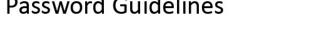**Slide 11 of 22 - Account Manager Login Information Page**

Slide notes

If you are a new user, the Account Manager Login Information page will appear, requesting you to set up a Login ID and Password using the following guidelines.

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

Slide 12 of 22 - Password Guidelines

Account Manager Login Information - Password Guidelines

Login IDs:
- Must be 7 Characters
- Must be in the format of AA999AA
- Login ID and Password cannot be the same

Passwords:
- Must be changed every 60 days
- Must be 8 characters in length
- Must contain at least one upper case and one lower case letter, one number, and one special character
- Cannot be changed more than once per day
- Cannot contain 4 consecutive characters from the previous
- Must be different from last 24 passwords
- Cannot contain a reserve word

Slide notes

Login IDs must be 7 characters, must be in the format of AA999AA (first two alphabetic, next three numeric, last two alphabetic). The 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 cannot contain a reserved word. The updated Reserved Words List can be referenced in the latest WCMSAP User Guide.

Slide 13 of 22 - Account Manager Login

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.

Choose Security Questions and Provide Answers

Security Question 1 *   Please Select

Answer 1 *

Security Question 2 *   Please Select

Answer 2 *

[Previous] [Next]

CMS/HHS Vulnerability Disclosure Policy   Privacy Policy   User Agreement   Adobe Acrobat

Slide notes

The security information requested on this page will allow the system to authenticate your identity each time you log in to the WCMSAP. Create your Login ID and enter and re-enter a Password.

Select two Security Questions and Answers and click Next. You will use your Login ID and Password to enter the WCMSAP site and manage the account, 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. When you have completed the Account Manager Login Information page, click Next to continue.

Slide 14 of 22 - Forgotten Password and ID

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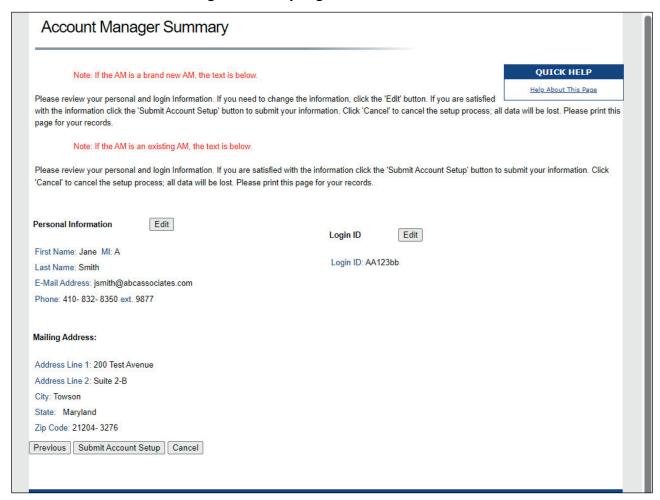
If a password or login is forgotten, you can use the forgot password or forgot login links and a temporary password or your login ID will be sent to the email address given during registration. Once you receive the email, return to the Welcome page and log in using your login ID and temporary password.

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.

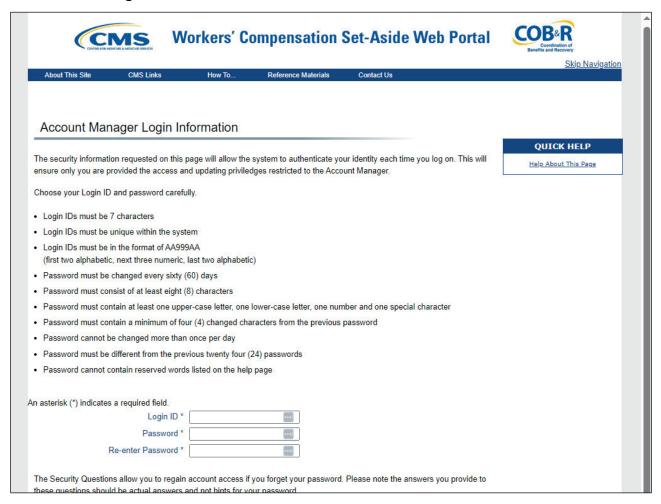**Slide 15 of 22 - Account Manager Summary Page**

Slide notes

The Account Manager Summary page will appear. This page lists all of the information you entered during Account Setup. All information should be reviewed and verified before continuing.

To make any corrections, or to change previously entered information click the Edit button next to the section that needs to be modified. This will return you to the applicable page to make modifications.
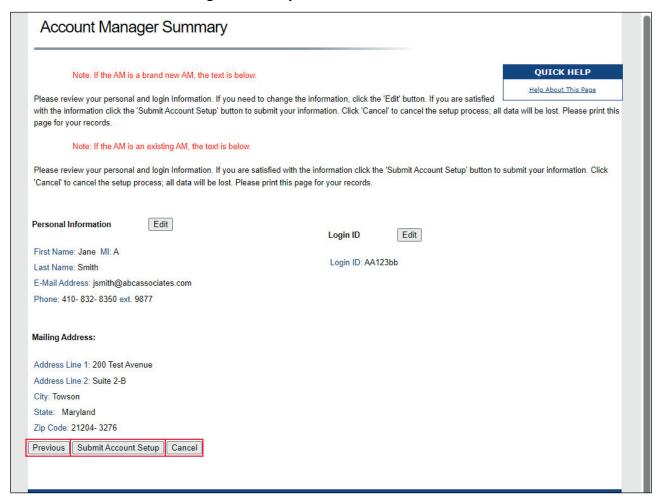
Slide 16 of 22 - Login and Password

Slide notes

Change any of the information as needed. Once you have finished editing the information, click Next to return to the Account Manager Summary page.
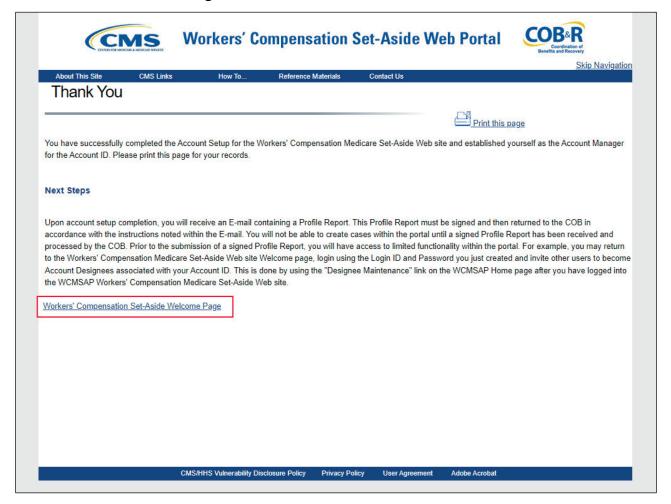
Slide 17 of 22 - Account Manager Summary

Slide notes

If you need to return to the Account Manager Login Information page, click Previous. If you need to cancel the account setup, click Cancel. To submit your information, click Submit Account Setup.

Slide 18 of 22 - Thank You Page

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 19 of 22 - Next Steps

Next Steps

- Profile Report will be sent via email from the BCRC

  - Review for accuracy, sign, and return to the BCRC
  - May take up to 10 business day to receive report
  - Contact EDI Department if Profile Report is not received with 10 business days
  - Profile Report must be reviewed, signed, and returned to BCRC within 60 business days

    - Use "WCMSAP Profile Report" in the email subject line
    - You cannot submit, view, or create cases until the signed Profile Report is received by the BCRC
    - Account will be automatically deleted on 60th business day and the registration process must be restarted

Slide notes

At this point, you will 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. 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 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. You cannot submit, view, or create cases until the signed Profile Report is received by the BCRC.

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

Note: If a signed Profile Report is not received within 60 business days, 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 20 of 22 - Course Summary

Course Summary

You should now be able to:

- Explain how to setup a WCMSAP account as a Self-Submitter

- Establish a login identification (ID/Password) as a Self-Submitter

- Describe Next Steps once account setup is complete

SUMMARY

Slide notes

You should now be able to:

- Explain how to setup a WCMSAP account as a Self-Submitter,
- Establish login identification (ID/Password) as a Self-Submitter, and
- Describe the next steps once account set up is complete.

Slide 21 of 22 - Conclusion

Slide notes

You have completed the WCMSAP Account Setup – Self Submitter course. The information in this course can be referenced by using the document at the following link: WCMSAP User Guide PDF.

Slide 22 of 22 - WCMSAP Training Survey

Slide notes

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