

## Basic Functions - Account Manager

### Slide 1 of 45 - Basic Functions - Account Manager

**CMS**  
CENTERS FOR MEDICARE & MEDICAID SERVICES

**COB&R**  
Coordination of  
Benefits and Recovery

# Workers' Compensation Medicare Set-Aside Portal (WCMSAP)

## Basic Functions - Account Manager

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

### Slide notes

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

**Slide 2 of 45 - 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>.

**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: [Workers' Compensation Medicare Set Aside Arrangements | CMS](#).

**Slide 3 of 45 - Course Overview**

## Course Overview

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

- Identify the role of Account Manager
- Discuss the Basic Function of the Account Manager
  - Managing Account Profile
  - Conduct Designee Maintenance



**Slide notes**

By the end of this course, you will be able to identify the role of the Account Manager as well as the basic functions of the Account Manager including managing the account profile and conducting designee maintenance.

**Slide 4 of 45 - Account Manager Role**

## Account Manager - Role

Each WCMSAP account must have an Account Manager

- Established during Account Setup
- One per WCMSAP account

Controls the administration of account and manages cases

Registered user of system

Has unlimited access to WCMSAP functionality

- After they review, sign, and return profile report to the BCRC

**Slide notes**

Each WCMSAP account must have an assigned Account Manager. The Account Manager is established during the Account Setup process. Each WCMSAP account can have only one Account Manager.

This is the individual who controls the administration of an organization's account and manages cases, which includes managing case access.

The Account Manager is a registered user of the system.

The Account Manager for Representative and Self accounts will have unlimited access to WCMSAP functionality and cases as soon as the Benefits Coordination & Recovery Center (BCRC) has received their signed profile report.

For Corporate and Professional Administrator account types, the Account Manager will only be granted access after the profile report is signed and returned by the Account Representative.



**Slide 5 of 45 - Account Manager Role****Slide notes**

The Account Manager for Self-account types is, by default, the submitter.

For Professional Administrators, Corporate and Representative account types, the Account Manager is assigned during the Account Setup process.

For Representative accounts, the submitter may be the Account Manager, but they have the option to assign the Account Manager role to another person.

**Slide 6 of 45 - Account Manager Basic Functions**

## Account Manager - Basic Functions

- Manages the account profile and updates account information
- Submits new cases
- Can view and update cases
- Can add or replace documentation
- Can invite Account Designees and can be Account Designee in another account
  - Corporate, Professional Administrators, or Representative account types only
- Can associate Account Designees to cases
- Can revoke Account Designees' access (e.g. due to account inactivity)
- Can submit a single case, for themselves or as Representative Payee
  - Self account types only

**Slide notes**

The Account Manager basic functions are:

- manages the WCMSAP account's profile information and updates general account information;
- Submits new cases for the WCMSAP account they are associated with;
- Can view and update all cases for the WCMSAP account they are associated with;
- Can add or replace documentation to a specific case for the account;
- Can invite other users to function as Account Designees and can be an Account Designee in another account (Account Designees are for Corporate, Professional Administrators, or Representative account types only);
- Can associate an Account Designee to cases;
- Can revoke Account Designee's' access to cases and/or an entire WCMSAP account; and
- Can submit a single case, as an Account Manager or as a Representative Payee. (For Self-account types only).

To replace an Account Manager, the Account Representative for Corporate accounts, or the original submitter for Representative accounts, must contact the Electronic Data interchange (EDI) Department.

**Slide 7 of 45 - Account Manager Basic Functions**

## Professional Administrator - Account Manager Role

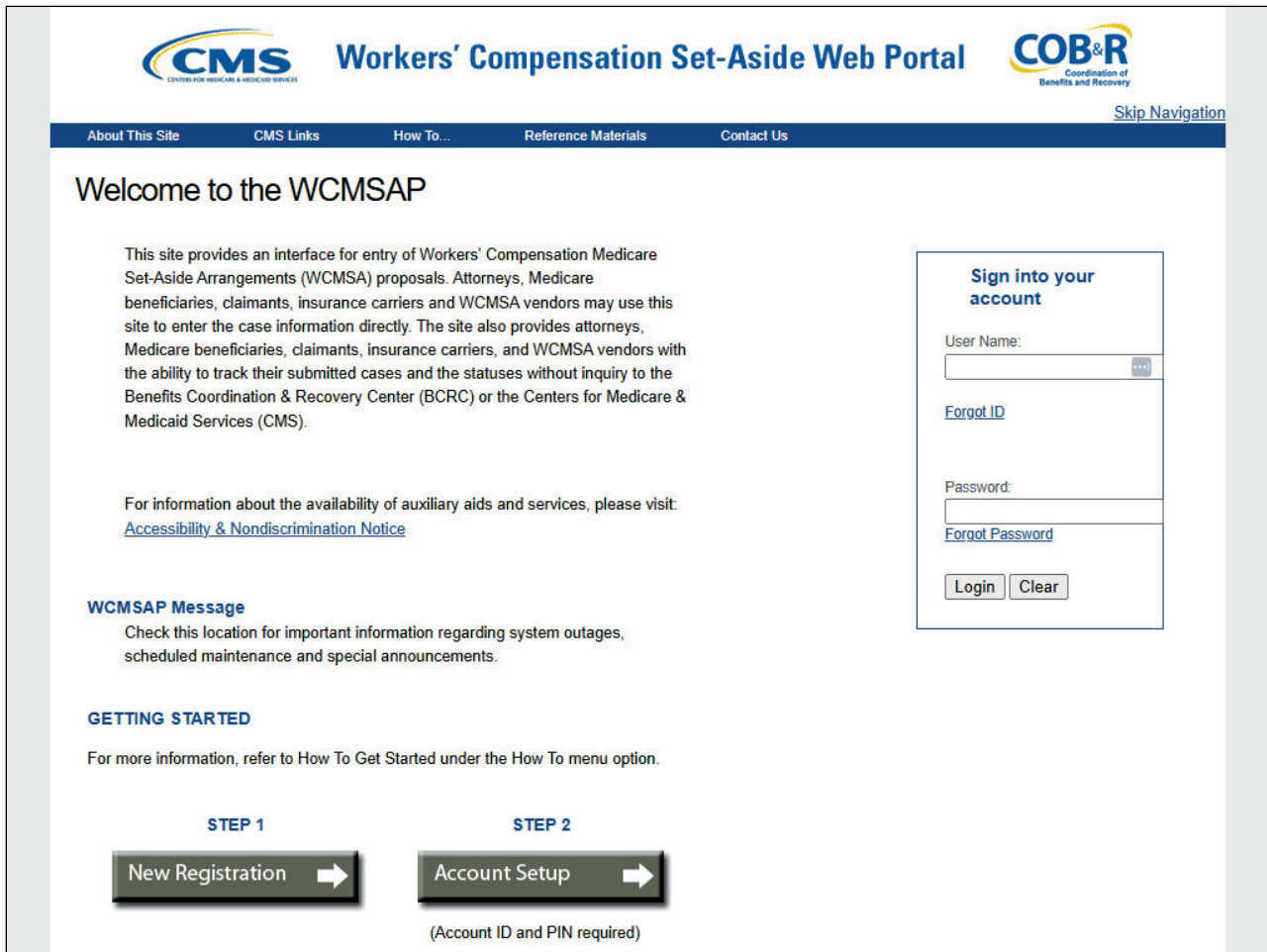
Responsible for inviting other employees to register on the Web Portal

May submit and receive transaction files on his own or invite Designees to assist as needed

**Slide notes**

As a Professional Administrator, the Account Managers Role includes 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.

## Slide 8 of 45 - Welcome to WCMSAP



The screenshot shows the 'Workers' Compensation Set-Aside Web Portal'. The header includes the CMS logo (Centers for Medicare & Medicaid Services), the portal title, 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 in the top right.

## Welcome to the WCMSAP

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

For information about the availability of auxiliary aids and services, please visit: [Accessibility & Nondiscrimination Notice](#)

**WCMSAP Message**  
Check this location for important information regarding system outages, scheduled maintenance and special announcements.

**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)

**Sign into your account**  
User Name:  
  
[Forgot ID](#)  
Password:  
  
[Forgot Password](#)

## Slide notes

To access a WCMSAP account and manage the case submission process, the Account Manager must first successfully log in to the WCMSAP application.

## Slide 9 of 45 - WCMSAP Account List

**WCMSAP Account List**

**Corporate and Representative Accounts**

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 the WCMSAP for all eligible WCMSAs where you are the identified administrator.

**Professional Administrator Accounts**

The WCMSAP provides an interface for you to view summary information for WCMSA cases you administer by utilizing the Case Lookup function. You can also upload account transaction files and receive corresponding response files for the WCMSAs you administer.

Click the desired Account ID link below to access the specific account and perform these functions. You may modify your personal account settings by clicking the appropriate link under the Account Settings list.

**Associated Account IDs:**

- [30401](#) - Corporate
- [30324](#) - Corporate
- [30184](#) - Representative
- [30185](#) - Professional Administrator

**QUICK HELP**

[Help About This Page](#)

**Account Settings**

[Update Personal Information](#)

[Change Password](#)

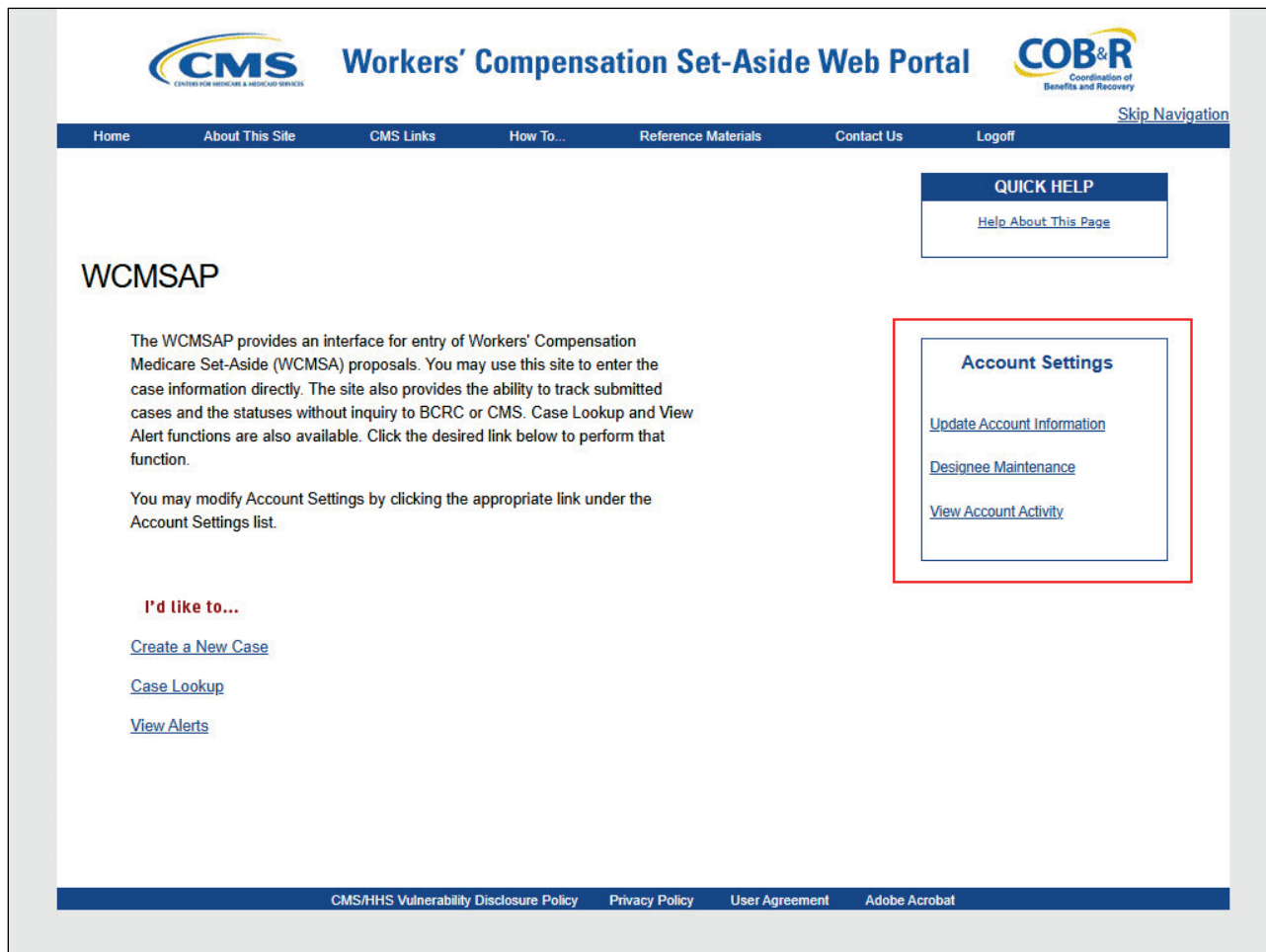
**WCMSA Resources**

[Major Medical Center Lookup](#)

## Slide notes

The WCMSAP Account List page will appear. Select the Associated Account ID link to access that specific account.

## Slide 10 of 45 - WCMSAP Home Page



The screenshot displays the WCMSAP Home Page. At the top, there are logos for CMS (Center 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 Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Logoff, with a "Skip Navigation" link on the right. A "QUICK HELP" box contains a link to "Help About This Page". The main content area is titled "WCMSAP" and contains a paragraph explaining the site'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 BCRC or CMS. Case Lookup and View Alert functions are also available. Click the desired link below to perform that function." Below this, a paragraph states: "You may modify Account Settings by clicking the appropriate link under the Account Settings list." A red box highlights the "Account Settings" section, which includes links for "Update Account Information", "Designee Maintenance", and "View Account Activity". Under the heading "I'd like to...", there are links for "Create a New Case", "Case Lookup", and "View Alerts". The footer contains links for "CMS/HHS Vulnerability Disclosure Policy", "Privacy Policy", "User Agreement", and "Adobe Acrobat".

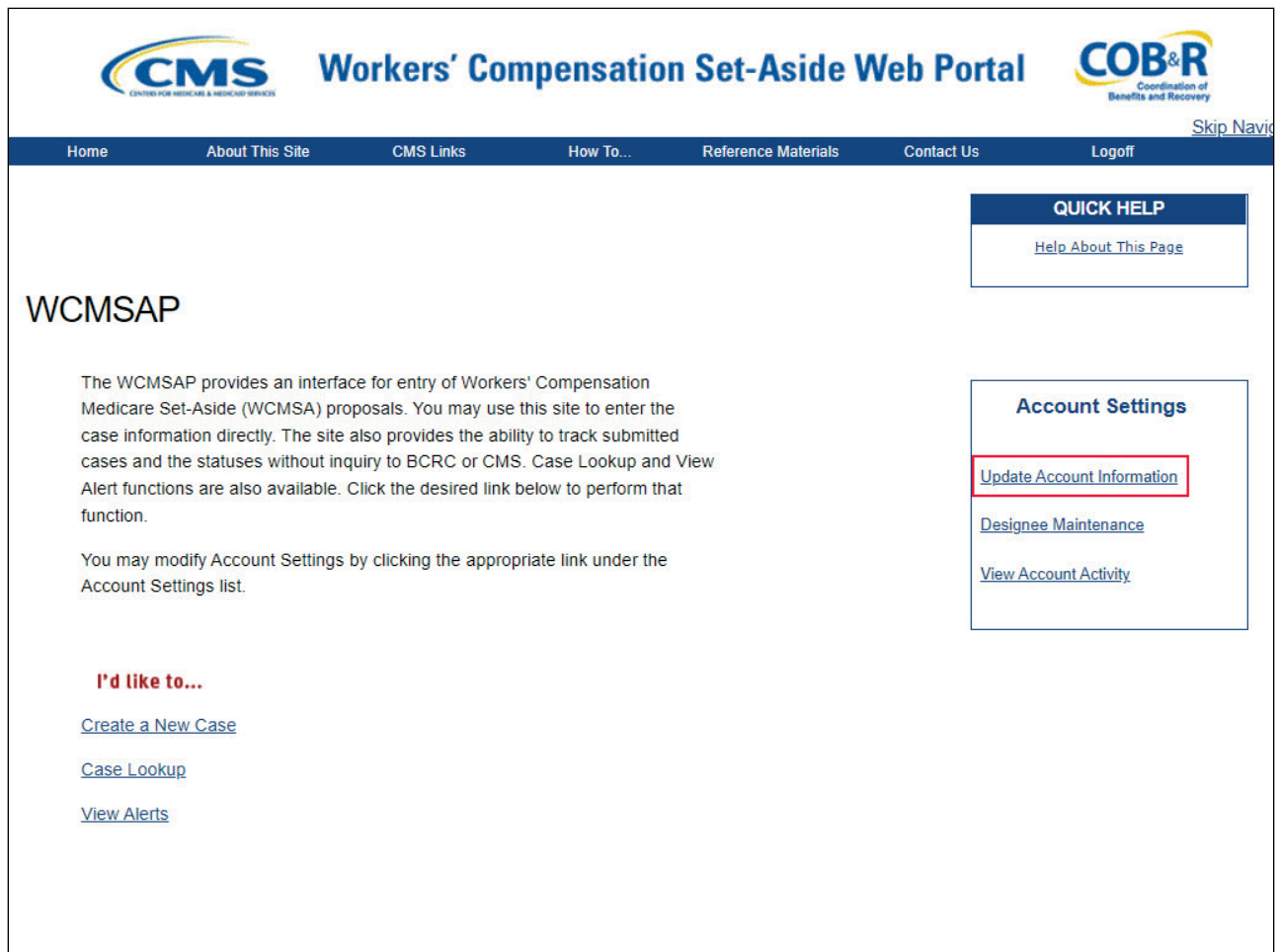
## Slide notes

The WCMSAP Home page will appear. From this page, the Account Manager can manage cases and manage account access.

Case access is controlled through the Account Settings. Although Account Managers have access to all of the Account Settings, the focus of this CBT is on Update Account Information and Designee Maintenance.

For more information on the other Account Settings, please see the [Login and User Maintenance](#) CBT.

## Slide 11 of 45 - WCMSAP Home Page



The screenshot shows the WCMSAP Home Page. At the top, there are logos for CMS (Center for Medicare & Medicaid Services) and COB&R (Coordination of Benefits and Recovery), along with the title "Workers' Compensation Set-Aside Web Portal". A navigation bar includes links for Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Logoff. A "Skip Navigation" link is also present. On the right side, there is a "QUICK HELP" box with a link to "Help About This Page". The main content area is titled "WCMSAP" and contains a paragraph explaining the site'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 BCRC or CMS. Case Lookup and View Alert functions are also available. Click the desired link below to perform that function." Below this paragraph, it states: "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" (highlighted with a red rectangle), "Designee Maintenance", and "View Account Activity". At the bottom left, under the heading "I'd like to...", there are three links: "Create a New Case", "Case Lookup", and "View Alerts".

## Slide notes

To revise account information, the Account Manager will click the Update Account Information link in the Account Settings box on the Home page.

Account Managers can grant Account Designees access to a case or revoke or remove Account Designees access to a case or an entire account.

## Slide 12 of 45 - Update Corporation Information

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

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

### Update Corporate Information

[Print this page](#)

You may edit the Corporate Account information or Account Representative information by clicking on the 'Edit' button of that section. You may not change the Account Type.

**Account Type:** Corporate

**Corporate Information** [Edit](#)

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

**Business Mailing Address:** [Edit](#)

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

**Account Representative Information** [Edit](#)

First Name: Jane MI: A Last Name: Smith  
Title: Director  
E-Mail Address: jsmith@abcassociates.com  
Phone: 410-832-8350 ext. 9877  
Fax: 410-832-8999

[Previous](#) [Submit Update](#) [Cancel](#)

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

**QUICK HELP**  
[Help About This Page](#)

## Slide notes

When the Update Account Information link is clicked, an Update Information page will appear.

The one pictured here, Update Corporate Information page, is what will display for Corporate users. This page lists the account's mailing address, and Account Representative contact information.

Please note: The Update Information screens for Representative and Self account types are very similar and function the same way.



## Slide 13 of 45 - Update Corporation Information

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

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

## Update Corporate Information

[Print this page](#)

You may edit the Corporate Account information or Account Representative information by clicking on the 'Edit' button of that section. You may not change the Account Type.

**Account Type:** Corporate

**Corporate Information** [Edit](#)

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

**Business Mailing Address:** [Edit](#)

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

**Account Representative Information** [Edit](#)

First Name: Jane MI: A Last Name: Smith  
 Title: Director  
 E-Mail Address: jsmith@abcassociates.com  
 Phone: 410- 832- 8350 ext. 9877  
 Fax: 410- 832- 8999

[Previous](#) [Submit Update](#) [Cancel](#)

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

## Slide notes

To make any corrections, click the Edit button next to the section that requires revisions to return to that page.

Note: If the Account Manager needs to replace their Account Representative with another person, they may do so by editing the Account Representative Information page.

Change or correct any of the information as needed. Once all corrections have been made, click Next at the bottom of the page to navigate back to the Update Corporate Information page.

After you have returned to the Update Information page, click the Next button.

The system will display a warning message when a change is made to the WCMSAP account information indicating that the updated information will be used for all future official communications.

## Slide 14 of 45 - Corporate Information Confirmation

The screenshot displays the 'Workers' Compensation Set-Aside Web Portal' with the CMS and COB&R logos. The navigation bar includes links for Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Logoff. The main heading is 'Corporate Information Update Confirmation'. A 'Print this page' link is available. A 'QUICK HELP' button with a 'Help About This Page' link is also present. The confirmation message states: 'Your corporate information has been updated. Print this page for your records.' The updated information is organized into two columns: 'Corporate Information' and 'Account Representative Information'. The 'Corporate Information' column lists the Employer Identification Number (EIN) as 123456789, the Corporate Name as ABC Company, and the Business Mailing Address as 200 Test Avenue, Suite 2-B, Towson, Maryland, with Zip Code 21204-3276. The 'Account Representative Information' column lists the First Name as Jane, MI as A, Last Name as Smith, Title as Director, Date of Birth as 06/12/1968, E-Mail Address as jsmith@abcassociates.com, Phone as 410-832-8350 ext. 9877, and Fax as 410-832-8999. A 'Return to Home' button is located at the bottom left. The footer contains links for CMS/HHS Vulnerability Disclosure Policy, Privacy Policy, User Agreement, and Adobe Acrobat.

**Corporate Information Update Confirmation**

Print this page

**QUICK HELP**  
Help About This Page

Your corporate information has been updated. Print this page for your records.

Account Type: Corporate

**Corporate Information**

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

**Business Mailing Address:**

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

**Account Representative Information**

First Name: Jane MI: A Last Name: Smith  
Title: Director  
Date of Birth: 06/12/1968  
E-Mail Address: jsmith@abcassociates.com  
Phone: 410-832-8350 ext. 9877  
Fax: 410-832-8999

Return to Home

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

## Slide notes

Next, the system will display the Corporate Information Update Confirmation page, showing the updated information.

With the exception of a modification to an email address, the system will send an email to the Account Manager, indicating that the account information has been changed.

Included in the email notification will be a profile report.

The Account Manager will be instructed to notify the BCRC if they did not initiate the update.

Click the Return to Home button to return to the WCMSAP Home page.

**Slide 15 of 45 - Update Account Information**

## Update Account Information

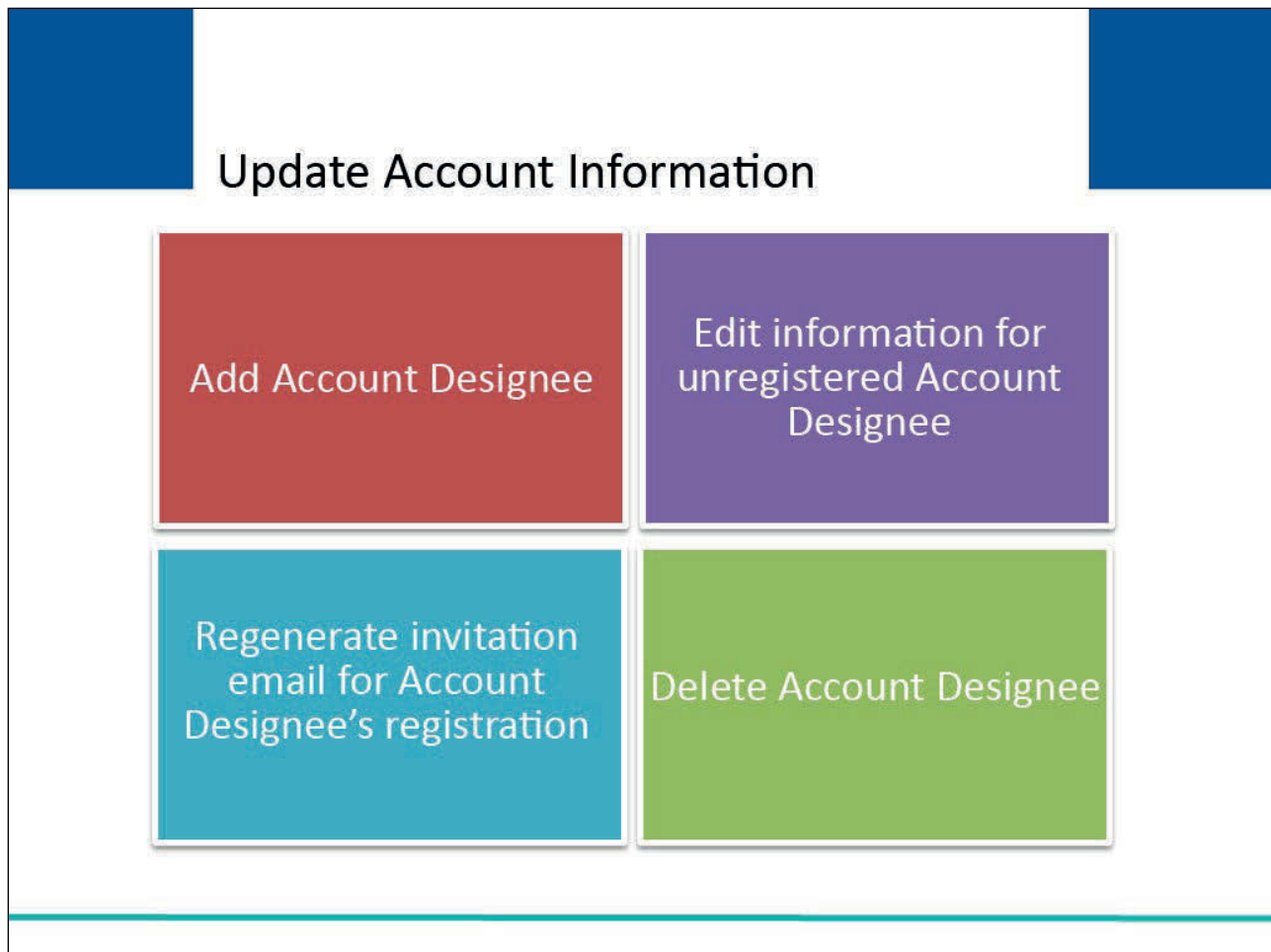
- When email address has been changed:
  - System sends email to old email address
  - Email recipient is instructed to
    - Click on link to proceed if they initiated change
    - Not click link and notify BCRC if they did not initiate change
  - If recipient clicks link, email is sent to new address

**Slide notes**

When an email address has been changed, the system will send an email to the old email address stating that an email address change has been requested.

The email recipient will be instructed to click on a link to proceed with the change, but only if they initiated the change.

The recipient will be instructed not to click the link and to notify the BCRC if they did not initiate the email address change. If the recipient clicks the link, an email reflecting the change will then be sent to the new email address.

**Slide 16 of 45 - Designee Maintenance****Slide notes**

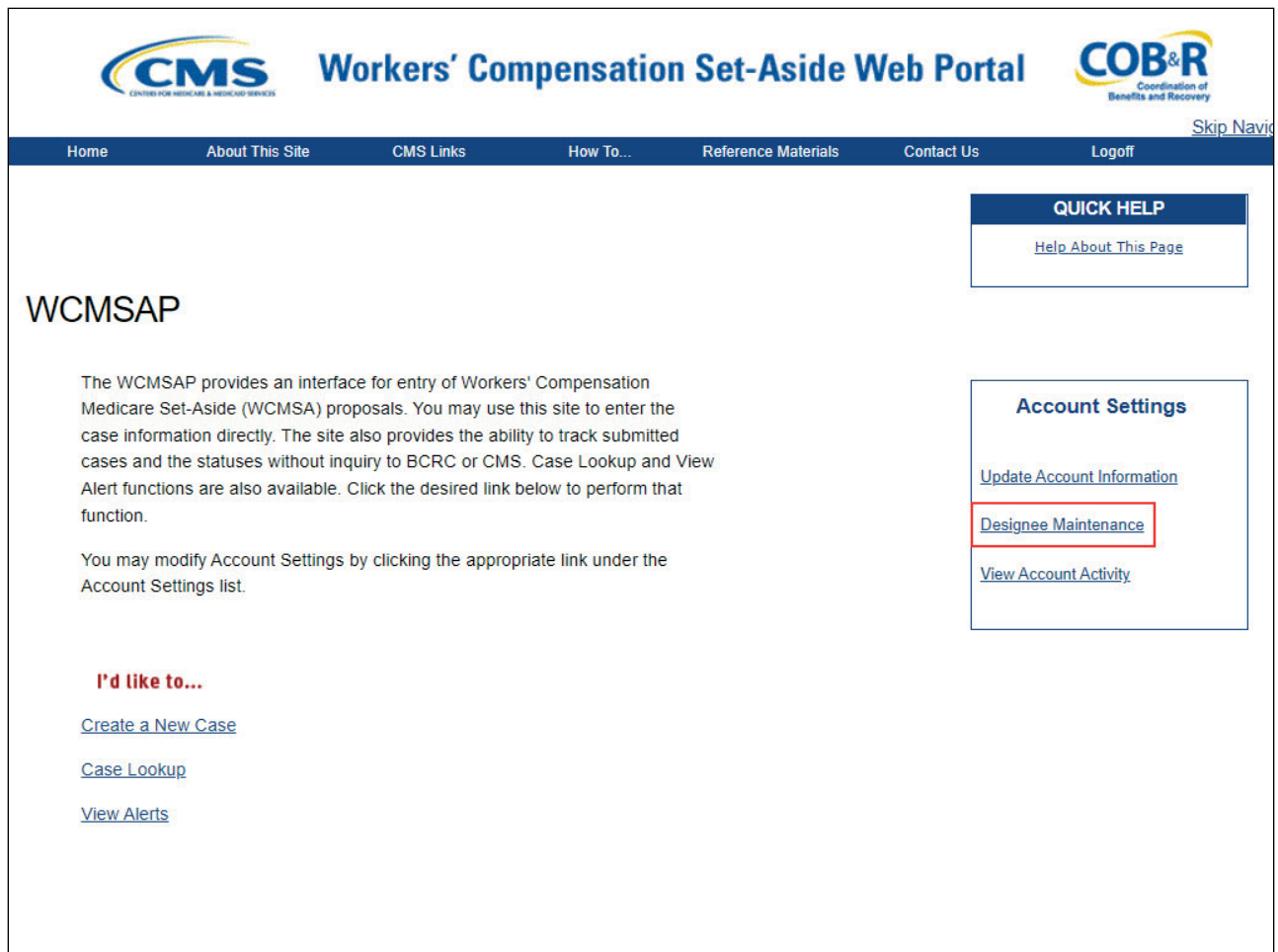
For Corporate and Representative accounts, the Account Manager may designate one or more Account Designees to assist with case submission and management.

The Account Manager can perform the following Designee Maintenance functions:

- Add an Account Designee,
- Edit information for an unregistered Account Designee,
- Regenerate an invitation email with a token link for an Account Designee's registration, and
- Delete an Account Designee.

Note: You can also change an Account Designee into an Account Manager by calling your EDI Representative.

## Slide 17 of 45 - WCMSAP Home Page



The screenshot shows the WCMSAP Home Page. At the top, there are logos for CMS (Center for Medicare & Medicaid Services) and COB&R (Coordination of Benefits and Recovery), along with the title "Workers' Compensation Set-Aside Web Portal". A navigation bar includes links for Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Logoff. A "Skip Navigation" link is also present. On the right side, there is a "QUICK HELP" section with a link to "Help About This Page". Below this, the "Account Settings" section contains links for "Update Account Information", "Designee Maintenance" (which is highlighted with a red box), and "View Account Activity". On the left side, the "WCMSAP" heading is followed by a paragraph explaining the site'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 BCRC or CMS. Case Lookup and View Alert functions are also available. Click the desired link below to perform that function." Below this paragraph, a section titled "I'd like to..." offers links for "Create a New Case", "Case Lookup", and "View Alerts".

**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 BCRC or CMS. 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](#)

## Slide notes

To manage Account Designees, the Account Manager will click the Designee Maintenance link from the Account Settings menu.

## Slide 18 of 45 - Designee Listing

The screenshot shows the 'Designee Listing' page of the 'Workers' Compensation Set-Aside Web Portal'. The page header includes the CMS logo (Center for Medicare & Medicaid Services) 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.

## Designee Listing

This page provides the Designee(s) information for the individuals you have assigned to the account.

An Account Manager can only make changes to a pending Designee. Once the Designee has registered and has a Login ID, the Account Manager cannot make changes to the Designee information other than deleting the Designee from the account.

To make changes to the account of a particular Designee listed, select the link on the individual's last name. To delete a Designee select the Delete function to the left of the individual's name. Use the **Add a Designee** function to include an individual as a designee. Individuals added as designees will receive an e-mail notifying them that they have been invited to be a designee for the account.

Selecting **Continue** will return to the Home Page.

Total Number of Account Designees: 2

Clear Filters

Delete	Last Name	First Name	E-mail Address	Passphrase	Status	Last Login Date
<input type="checkbox"/>	<input type="text" value="Search"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/>	<a href="#">Jones</a>	Pam	pjones@abc.com	jones	Pending	
<input checked="" type="checkbox"/>	Doe	Jane	jdoe@abc.com	let me in	Active	04/08/2017

At the bottom, there is a footer with links: CMS/HHS Vulnerability Disclosure Policy, Privacy Policy, User Agreement, and Adobe Acrobat.

## Slide notes

The Designee Listing page will appear. All Designees and their associated statuses (Pending, Active, Locked, Expired, Revoked) will be listed.

## Slide 19 of 45 - Designee Listing

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

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

## Designee Listing

This page provides the Designee(s) information for the individuals you have assigned to the account.

An Account Manager can only make changes to a pending Designee. Once the Designee has registered and has a Login ID, the Account Manager cannot make changes to the Designee information other than deleting the Designee from the account.

To make changes to the account of a particular Designee listed, select the link on the individual's last name. To delete a Designee select the Delete function to the left of the individual's name. Use the **Add a Designee** function to include an individual as a designee. Individuals added as designees will receive an e-mail notifying them that they have been invited to be a designee for the account.

Selecting **Continue** will return to the Home Page.

Total Number of Account Designees: 2

Clear Filters

Delete	Last Name	First Name	E-mail Address	Passphrase	Status	Last Login Date
<input type="checkbox"/>	Search <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/>	<a href="#">Jones</a>	Pam	pjones@abc.com	jones	Pending	
<input checked="" type="checkbox"/>	Doe	Jane	jdoe@abc.com	let me in	Active	04/08/2017

**Add a Designee** **Return Home**

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

## Slide notes

To add a potential Account Designee, the Account Manager must first invite them. To initiate this process, click Add a Designee.

**Slide 20 of 45 - Designee Information**

The screenshot shows the 'Designee Information' 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, Logoff, and Skip Navigation. The main heading is 'Designee Information'. Below it, instructions state: 'Please click the 'Next' button to check the E-Mail Address of a potential designee. To cancel and return to the Designee Listing page, click the 'Previous' button.' A note mentions: 'An asterisk (\*) indicates a required field. We ask for the e-mail address to verify if the person is currently a registered user.' The form contains two text input fields: 'Designee E-mail Address: \*' and 'Re-enter Designee E-mail Address: \*', both enclosed in a red rectangular box. Below the fields are 'Previous' and 'Next' buttons, with the 'Next' button also highlighted by a red box. A 'QUICK HELP' section on the right contains a link 'Help About This Page'. The footer includes links for CMS/HHS Vulnerability Disclosure Policy, Privacy Policy, User Agreement, and Adobe Acrobat.

**Designee Information**

Please click the 'Next' button to check the E-Mail Address of a potential designee. To cancel and return to the Designee Listing page, click the 'Previous' button.

An asterisk (\*) indicates a required field. We ask for the e-mail address to verify if the person is currently a registered user.

Designee E-mail Address: \*

Re-enter Designee E-mail Address: \*

**QUICK HELP**

[Help About This Page](#)

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

**Slide notes**

The Designee Information page appears. The Account Manager will enter and re-enter the email address of the Account Designee they wish to invite and then click Next to continue.



**Slide 21 of 45 - Designee Maintenance**

## Designee Maintenance

- System verifies that email is not in the database for existing user
- Existing user can be an Account Designee as long as
  - They are not registered as Account Representative for any Account ID
  - Are not the Account Manager for the same Account ID

**Slide notes**

When Next is clicked, the system will verify that the entered email address is not in the database for an existing user.

An existing, registered user can be an Account Designee for your Account ID if they are not already registered as an Account Representative for any Account ID, or the Account Manager for the same Account ID.

## Slide 22 of 45 - Designee Invitation

The screenshot shows the 'Designee Invitation' page of the 'Workers' Compensation Set-Aside Web Portal'. The page header includes the CMS logo, the portal title, the COB&R logo, and a 'Skip Navigation' link. A navigation bar contains links for Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Logoff. The main heading is 'Designee Invitation'. A 'QUICK HELP' box with a 'Help About This Page' link is on the right. The instructions state: 'Please provide the name and a pass-phrase for the designee to enter during the registration process.' and 'An asterisk (\*) indicates a required field.' There are four input fields: 'Designee First Name: \*', 'Designee Last Name: \*', 'Passphrase: \*', and 'Re-enter Passphrase: \*'. Below the fields, text explains that clicking 'Next' leads to a confirmation page for Jane Doe and that clicking 'Previous' or 'Cancel' leads back or terminates the process. An 'OR' section follows, stating that if the email is found, clicking 'Continue' leads to a confirmation page and clicking 'Next' returns to the listing screen. At the bottom are 'Cancel', 'Previous', and 'Next' buttons, with 'Next' highlighted by a red box.

**Designee Invitation**

**QUICK HELP**  
[Help About This Page](#)

Please provide the name and a pass-phrase for the designee to enter during the registration process.

An asterisk (\*) indicates a required field.

Designee First Name: \*

Designee Last Name: \*

Passphrase: \*

Re-enter Passphrase: \*

When the user clicks Next they will be taken to a confirmation page stating that an invitation e-mail notifying Jane Doe to register on the WCMSAP Website will be sent to the provided E-Mail Address.

If the user clicks the Previous button, they will be taken to the Designee E-mail entry screen. If the user clicks Cancel from the pass-phrase entry screen, the action will be terminated and the Designee will not be added to the account.

OR

The e-mail address that you entered has been found, please verify this is the Designee you intended to invite. If the user clicks Continue they will be taken to a confirmation page that states that the designee will receive an email notifying them that they have been invited to become a designee on the Account and may access the Account information by logging into the WCMSAP Secure Website. When they click Next they will be taken back to the Designee Listing Screen.

## Slide notes

If the entered email address is found in the system (i.e., the invited Account Designee is already a registered user), the Designee Invitation page appears.

The Account Manager must verify and confirm that the information entered is for the correct Designee by clicking Next.

**Slide 23 of 45 - Designee Confirmation**

The screenshot shows the 'Designee Confirmation' 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 Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Logoff. A 'Skip Navigation' link is also present. The main content area displays a confirmation message: 'The following Designee has been successfully added to the account. The designee will receive an email notifying them that they have been invited to become a designee on the Account and may access the Account information by logging into the WCMSAP Secure Website. If the invited Designee is not currently a registered user, please contact the Designee and provide them with passphrase you created; the passphrase is necessary for them to complete registration.' Below this message, the designee's details are listed: 'Designee First Name: Timothy', 'Designee Last Name: Baker', and 'Designee Email: tbaker@abc.com'. At the bottom of the main content area, there are two buttons: 'Return Home' and 'Next'. The 'Next' button is highlighted with a red border. A 'QUICK HELP' box with a link to 'Help About This Page' is located on the right side. The footer contains links to 'CMS/HHS Vulnerability Disclosure Policy', 'Privacy Policy', 'User Agreement', and 'Adobe Acrobat'.

**Designee Confirmation**

The following Designee has been successfully added to the account. The designee will receive an email notifying them that they have been invited to become a designee on the Account and may access the Account information by logging into the WCMSAP Secure Website. If the invited Designee is not currently a registered user, please contact the Designee and provide them with passphrase you created; the passphrase is necessary for them to complete registration.

Designee First Name: Timothy  
Designee Last Name: Baker  
Designee Email: tbaker@abc.com

[Return Home](#) [Next](#)

**QUICK HELP**  
[Help About This Page](#)

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

**Slide notes**

The Designee Confirmation page will appear. This page confirms that the invited Designee has been added to the account. The Designee will be sent an email notifying them that they have been added to the Account ID. Click Next to continue.

## Slide 24 of 45 - Active Status

The screenshot shows the 'Designee Listing' page of the Workers' Compensation Set-Aside Web Portal. The page header includes the CMS logo (Center for Medicare & Medicaid Services), the portal title, 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.

### Designee Listing

This page provides the Designee(s) information for the individuals you have assigned to the account.

An Account Manager can only make changes to a pending Designee. Once the Designee has registered and has a Login ID, the Account Manager cannot make changes to the Designee information other than deleting the Designee from the account.

To make changes to the account of a particular Designee listed, select the link on the individual's last name. To delete a Designee select the Delete function to the left of the individual's name. Use the **Add a Designee** function to include an individual as a designee. Individuals added as designees will receive an e-mail notifying them that they have been invited to be a designee for the account.

Selecting **Continue** will return to the Home Page.

Total Number of Account Designees: 2

Clear Filters

Delete	Last Name	First Name	E-mail Address	Passphrase	Status	Last Login Date
<input type="checkbox"/>	<input type="text" value="Search"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/>	<a href="#">Jones</a>	Pam	pjones@abc.com	jones	Pending	
<input checked="" type="checkbox"/>	Doe	Jane	jdoe@abc.com	let me in	Active	04/08/2017

Footer: CMS/HHS Vulnerability Disclosure Policy | Privacy Policy | User Agreement | Adobe Acrobat

## Slide notes

The Designee Listing page will reappear. The new Designee will be listed with an "Active" Status.

**Slide 25 of 45 - Designee Invitation**

The screenshot shows the 'Designee Invitation' page of the 'Workers' Compensation Set-Aside Web Portal'. The page header includes the CMS logo, the portal title, the COB&R logo, and a 'Skip Navigation' link. A navigation bar contains links for Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Logoff. The main heading is 'Designee Invitation'. A 'QUICK HELP' box with a link to 'Help About This Page' is on the right. The instructions state: 'Please provide the name and a pass-phrase for the designee to enter during the registration process.' and 'An asterisk (\*) indicates a required field.' There are four input fields: 'Designee First Name: \*', 'Designee Last Name: \*', 'Passphrase: \*', and 'Re-enter Passphrase: \*'. Below the fields, a paragraph explains that clicking 'Next' leads to a confirmation page for Jane Doe. Another paragraph states that clicking 'Previous' returns to the email entry screen, while clicking 'Cancel' terminates the action. An 'OR' section follows, explaining that if an email is found, clicking 'Continue' leads to a confirmation page, and clicking 'Next' returns to the listing screen. At the bottom are 'Cancel', 'Previous', and 'Next' buttons.

**Designee Invitation**

**QUICK HELP**  
[Help About This Page](#)

Please provide the name and a pass-phrase for the designee to enter during the registration process.

An asterisk (\*) indicates a required field.

Designee First Name: \*

Designee Last Name: \*

Passphrase: \*

Re-enter Passphrase: \*

When the user clicks Next they will be taken to a confirmation page stating that an invitation e-mail notifying Jane Doe to register on the WCMSAP Website will be sent to the provided E-Mail Address.

If the user clicks the Previous button, they will be taken to the Designee E-mail entry screen. If the user clicks Cancel from the pass-phrase entry screen, the action will be terminated and the Designee will not be added to the account.

OR

The e-mail address that you entered has been found, please verify this is the Designee you intended to invite. If the user clicks Continue they will be taken to a confirmation page that states that the designee will receive an email notifying them that they have been invited to become a designee on the Account and may access the Account information by logging into the WCMSAP Secure Website. When they click Next they will be taken back to the Designee Listing Screen.

**Slide notes**

If the Designee that is being invited is not a registered user (i.e., the entered email address is NOT found in the system), the Designee Invitation page will appear.

**Slide 26 of 45 - Designee Invitation**

The screenshot shows the 'Designee Invitation' page of the 'Workers' Compensation Set-Aside Web Portal'. The page header includes the CMS logo, the portal title, the COB&R logo, and a 'Skip Navigation' link. A navigation bar contains links for Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Logoff. The main heading is 'Designee Invitation'. A 'QUICK HELP' button with a link to 'Help About This Page' is on the right. The instructions state: 'Please provide the name and a pass-phrase for the designee to enter during the registration process.' and 'An asterisk (\*) indicates a required field.' A red box highlights the required fields: 'Designee First Name: \*', 'Designee Last Name: \*', 'Passphrase: \*', and 'Re-enter Passphrase: \*'. Below the form, instructions explain that clicking 'Next' leads to a confirmation page for Jane Doe and that clicking 'Previous' or 'Cancel' terminates the process. An 'OR' section explains that if an email is found, clicking 'Continue' leads to a confirmation page and clicking 'Next' returns to the listing screen. At the bottom are 'Cancel', 'Previous', and 'Next' buttons.

**Designee Invitation**

**QUICK HELP**  
[Help About This Page](#)

Please provide the name and a pass-phrase for the designee to enter during the registration process.

An asterisk (\*) indicates a required field.

Designee First Name: \*

Designee Last Name: \*

Passphrase: \*

Re-enter Passphrase: \*

When the user clicks Next they will be taken to a confirmation page stating that an invitation e-mail notifying Jane Doe to register on the WCMSAP Website will be sent to the provided E-Mail Address.

If the user clicks the Previous button, they will be taken to the Designee E-mail entry screen. If the user clicks Cancel from the pass-phrase entry screen, the action will be terminated and the Designee will not be added to the account.

OR

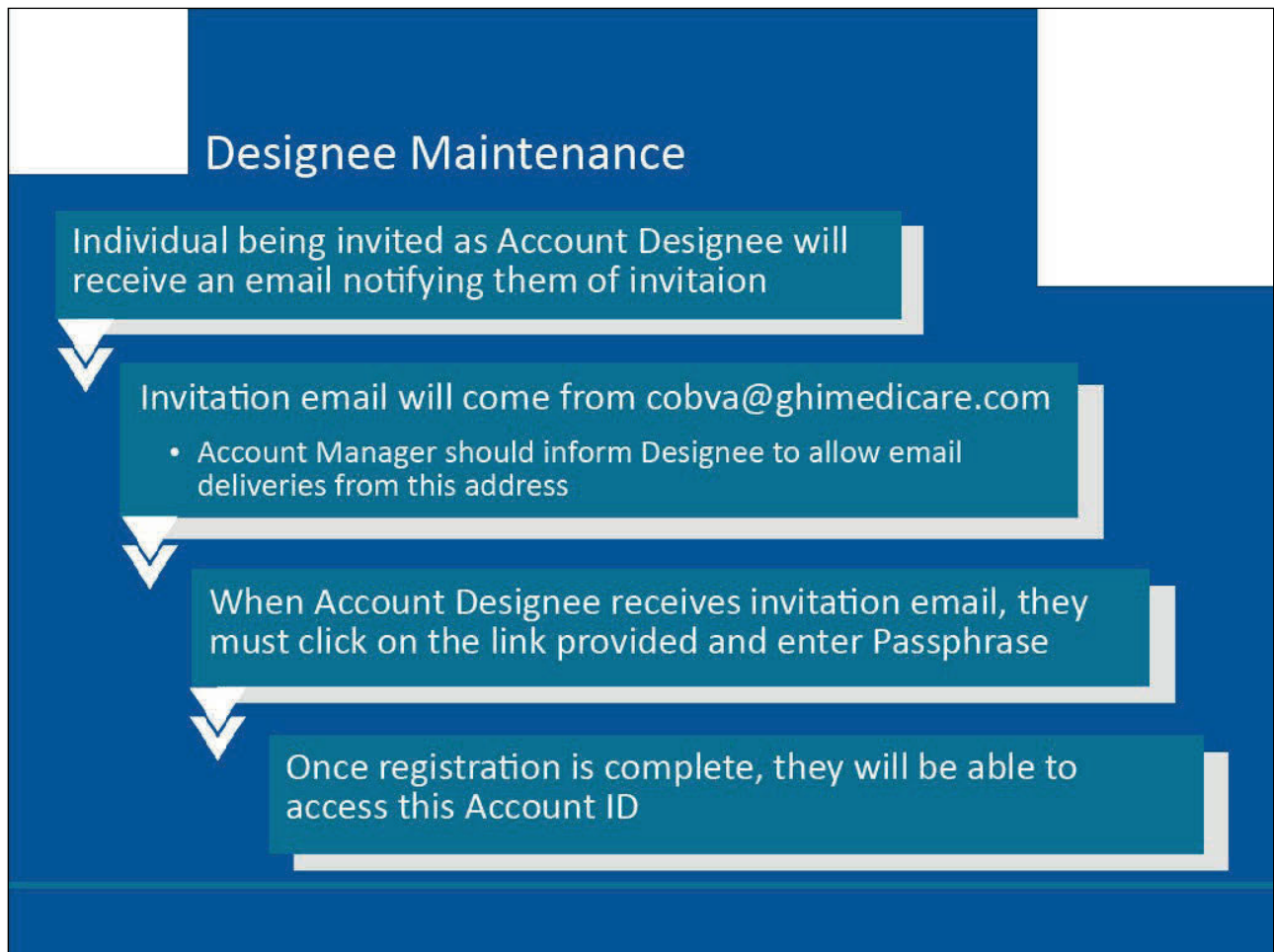
The e-mail address that you entered has been found, please verify this is the Designee you intended to invite. If the user clicks Continue they will be taken to a confirmation page that states that the designee will receive an email notifying them that they have been invited to become a designee on the Account and may access the Account information by logging into the WCMSAP Secure Website. When they click Next they will be taken back to the Designee Listing Screen.

**Slide notes**

Unregistered individuals must first be invited to be an Account Designee before they can become an Account Designee.

When the Designee Invitation page appears, the Account Manager must enter the First and Last Name for the individual they are inviting to be an Account Designee, and create a Passphrase (a short, case-sensitive phrase, up to 30 characters). The Passphrase is entered twice.

The Account Manager must contact their Account Designee and provide them with the Passphrase. The Account Designee will need this passphrase to register.

**Slide 27 of 45 - Designee Maintenance****Slide notes**

Once the invitation process is complete, the individual invited as an Account Designee will receive an email notifying them that they have been invited to be an Account Designee for the account.

The invitation email will come from [cobva@ghimedicare.com](mailto:cobva@ghimedicare.com). The Account Manager should inform the Designee to allow email deliveries from this address.

When the Account Designee receives the invitation email, they must click on the link provided in the email and enter the Passphrase that the Account Manager provided them with to successfully register for the WCMSAP.

Once the registration has been completed, they will be able to access this Account ID.



## Slide 28 of 45 - Designee Invitation

The screenshot shows the 'Designee Invitation' page of the 'Workers' Compensation Set-Aside Web Portal'. The page header includes the CMS logo, the portal title, and the COBR logo. 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. On the right, a 'QUICK HELP' box contains a link to 'Help About This Page'. The main content area starts with a heading 'Designee Invitation' and a paragraph: 'Please provide the name and a pass-phrase for the designee to enter during the registration process.' Below this, a note states: 'An asterisk (\*) indicates a required field.' There are four input fields: 'Designee First Name: \*', 'Designee Last Name: \*', 'Passphrase: \*', and 'Re-enter Passphrase: \*'. A paragraph follows: 'When the user clicks Next they will be taken to a confirmation page stating that an invitation e-mail notifying Jane Doe to register on the WCMSAP Website will be sent to the provided E-Mail Address.' Another paragraph states: 'If the user clicks the Previous button, they will be taken to the Designee E-mail entry screen. If the user clicks Cancel from the pass-phrase entry screen, the action will be terminated and the Designee will not be added to the account.' Below this is the word 'OR'. A final paragraph says: 'The e-mail address that you entered has been found, please verify this is the Designee you intended to invite. If the user clicks Continue they will be taken to a confirmation page that states that the designee will receive an email notifying them that they have been invited to become a designee on the Account and may access the Account information by logging into the WCMSAP Secure Website. When they click Next they will be taken back to the Designee Listing Screen.' At the bottom, there are three buttons: 'Cancel', 'Previous', and 'Next'. The 'Next' button is highlighted with a red border.

**Designee Invitation**

Please provide the name and a pass-phrase for the designee to enter during the registration process.

An asterisk (\*) indicates a required field.

Designee First Name: \*

Designee Last Name: \*

Passphrase: \*

Re-enter Passphrase: \*

When the user clicks Next they will be taken to a confirmation page stating that an invitation e-mail notifying Jane Doe to register on the WCMSAP Website will be sent to the provided E-Mail Address.

If the user clicks the Previous button, they will be taken to the Designee E-mail entry screen. If the user clicks Cancel from the pass-phrase entry screen, the action will be terminated and the Designee will not be added to the account.

OR

The e-mail address that you entered has been found, please verify this is the Designee you intended to invite. If the user clicks Continue they will be taken to a confirmation page that states that the designee will receive an email notifying them that they have been invited to become a designee on the Account and may access the Account information by logging into the WCMSAP Secure Website. When they click Next they will be taken back to the Designee Listing Screen.

## Slide notes

Click Next to continue.



**Slide 29 of 45 - Designee Confirmation**

The screenshot shows the 'Designee Confirmation' page of the 'Workers' Compensation Set-Aside Web Portal'. The page header includes the CMS logo (Center for Medicare & Medicaid Services) 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, Logoff, and Skip Navigation. The main heading is 'Designee Confirmation'. Below it, a paragraph states: 'The following Designee has been successfully added to the account. The designee will receive an email notifying them that they have been invited to become a designee on the Account and may access the Account information by logging into the WCMSAP Secure Website. If the invited Designee is not currently a registered user, please contact the Designee and provide them with passphrase you created; the passphrase is necessary for them to complete registration.' The designee's details are listed: Designee First Name: Timothy, Designee Last Name: Baker, and Designee Email: tbaker@abc.com. At the bottom left, there are two buttons: 'Return Home' and 'Next', with 'Next' highlighted by a red box. On the right, a 'QUICK HELP' box contains a link 'Help About This Page'. The footer contains links to CMS/HHS Vulnerability Disclosure Policy, Privacy Policy, User Agreement, and Adobe Acrobat.

**Designee Confirmation**

The following Designee has been successfully added to the account. The designee will receive an email notifying them that they have been invited to become a designee on the Account and may access the Account information by logging into the WCMSAP Secure Website. If the invited Designee is not currently a registered user, please contact the Designee and provide them with passphrase you created; the passphrase is necessary for them to complete registration.

Designee First Name: Timothy  
Designee Last Name: Baker  
Designee Email: tbaker@abc.com

[Return Home](#) [Next](#)

**QUICK HELP**  
[Help About This Page](#)

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

**Slide notes**

The Designee Confirmation page will appear. Click Next to continue.

## Slide 30 of 45 - Designee Listing

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

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

## Designee Listing

This page provides the Designee(s) information for the individuals you have assigned to the account.

An Account Manager can only make changes to a pending Designee. Once the Designee has registered and has a Login ID, the Account Manager cannot make changes to the Designee information other than deleting the Designee from the account.

To make changes to the account of a particular Designee listed, select the link on the individual's last name. To delete a Designee select the Delete function to the left of the individual's name. Use the **Add a Designee** function to include an individual as a designee. Individuals added as designees will receive an e-mail notifying them that they have been invited to be a designee for the account.

Selecting **Continue** will return to the Home Page.

Total Number of Account Designees: 2

Clear Filters

Delete	Last Name	First Name	E-mail Address	Passphrase	Status	Last Login Date
<input type="checkbox"/>	<input type="text" value="Search"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/>	<a href="#">Jones</a>	Pam	pjones@abc.com	jones	Pending	
<input checked="" type="checkbox"/>	Doe	Jane	jdoe@abc.com	let me in	Active	04/08/2017

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

## Slide notes

The Designee Listing page will reappear. The new Account Designee is listed with a status of "Pending."

**Slide 31 of 45 - Unregistered Account Designee**

## Edit Information for an Unregistered Account Designee

- Account Manager can edit personal information for “Pending” Account Designees
  - Have not yet registered on WCMSAP
- Account Manager can only view personal information for “Active” Account Designees
  - Cannot make changes to Account Designee’s information other than deleting them from the account

**Slide notes**

An Account Manager can edit personal information for Account Designees in “Pending” status.

Account Designees in “Pending” status have not yet registered on the WCMSAP. Account Managers can only view personal information for Designees in “Active” status.

Once the Designee has registered and has a Login ID, the Account Manager cannot make changes to the Account Designee’s information other than deleting the Account Designee from the account.

## Slide 32 of 45 - Designee Listing

The screenshot shows the 'Designee Listing' page of the Workers' Compensation Set-Aside Web Portal. The page header includes the CMS logo (Center for Medicare & Medicaid Services), the portal title, 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.

## Designee Listing

This page provides the Designee(s) information for the individuals you have assigned to the account.

An Account Manager can only make changes to a pending Designee. Once the Designee has registered and has a Login ID, the Account Manager cannot make changes to the Designee information other than deleting the Designee from the account.

To make changes to the account of a particular Designee listed, select the link on the individual's last name. To delete a Designee select the Delete function to the left of the individual's name. Use the **Add a Designee** function to include an individual as a designee. Individuals added as designees will receive an e-mail notifying them that they have been invited to be a designee for the account.

Selecting **Continue** will return to the Home Page.

Total Number of Account Designees: 2

Clear Filters

Delete	Last Name	First Name	E-mail Address	Passphrase	Status	Last Login Date
<input type="checkbox"/>	<input type="text" value="Search"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/>	<a href="#">Jones</a>	Pam	pjones@abc.com	jones	Pending	
<input checked="" type="checkbox"/>	Doe	Jane	jdoe@abc.com	let me in	Active	04/08/2017

Footer: CMS/HHS Vulnerability Disclosure Policy | Privacy Policy | User Agreement | Adobe Acrobat

## Slide notes

To make changes to the account of a particular Account Designee in "Pending" status, click the last name of the Designee whose information you wish to update.

## Slide 33 of 45 - Update Designee Information

**Update Designee Information**

Please click the 'Next' button to check the E-Mail Address of a potential designee. To cancel and return to the Designee Listing page, click the 'Previous' button.

An asterisk (\*) indicates a required field. We ask for the e-mail address to verify if the person is currently a registered user.

Designee First Name: \* Pam

Designee Last Name: \* Jones

Designee E-mail Address: \* pjones@abc.com

Re-enter Designee E-mail Address: \* pjones@abc.com

Passphrase: \* jones

Re-enter Passphrase: \* jones

☒ Regenerate token. Check this box if another invitation email must be sent to the Designee.

Previous **Next**

**QUICK HELP**  
[Help About This Page](#)

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

## Slide notes

The Update Designee Information page appears, with the Designee's personal information open for editing. Edit the "Pending" Account Designee's information as needed. Click Next to continue.

## Slide 34 of 45 - Designee Listings

The screenshot shows the 'Designee Listing' page of the Workers' Compensation Set-Aside Web Portal. The page header includes the CMS logo (Center for Medicare & Medicaid Services), the portal title, 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.

## Designee Listing

This page provides the Designee(s) information for the individuals you have assigned to the account.

An Account Manager can only make changes to a pending Designee. Once the Designee has registered and has a Login ID, the Account Manager cannot make changes to the Designee information other than deleting the Designee from the account.

To make changes to the account of a particular Designee listed, select the link on the individual's last name. To delete a Designee select the Delete function to the left of the individual's name. Use the **Add a Designee** function to include an individual as a designee. Individuals added as designees will receive an e-mail notifying them that they have been invited to be a designee for the account.

Selecting **Continue** will return to the Home Page.

Total Number of Account Designees: 2

Clear Filters

Delete	Last Name	First Name	E-mail Address	Passphrase	Status	Last Login Date
<input type="checkbox"/>	<input type="text" value="Search"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/>	<a href="#">Jones</a>	Pam	pjones@abc.com	jones	Pending	
<input checked="" type="checkbox"/>	Doe	Jane	jdoe@abc.com	let me in	Active	04/08/2017

Footer: CMS/HHS Vulnerability Disclosure Policy | Privacy Policy | User Agreement | Adobe Acrobat

## Slide notes

The Designee Listing page will re-appear and the Designee's personal information will be updated.

**Slide 35 of 45 - Regeneration Invitation Email**

## Regenerate Invitation Email

- Email is generated when Account Manager invites Account Designee
  - Includes link for self-registration
- If Account Designee misplaces/deletes email or has not registered within 30 days
  - Account Manager can regenerate email
    - Only for Account Designees in “Pending” status
- Previous token link will not work once new email is generated
- Email will come from [cobva@ghimedicare.com](mailto:cobva@ghimedicare.com)

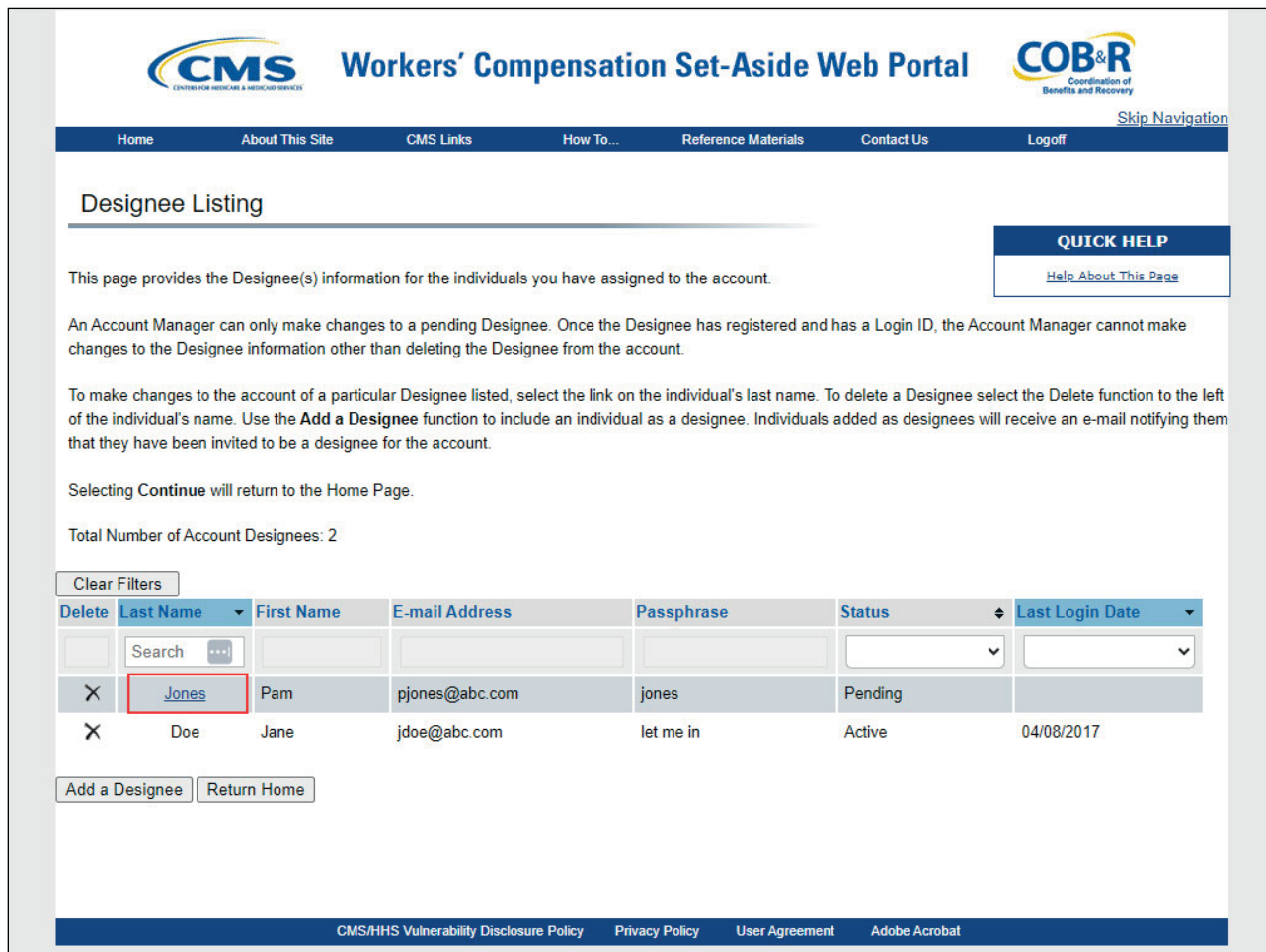
**Slide notes**

When the Account Manager invites a person to be an Account Designee, an email is generated and sent to the intended Designee informing them of the invitation and includes a link for them to access the WCMSAP site and self-register as an Account Designee.

If the intended Designee has misplaced or deleted the invitation email, or if the Account Designee has not registered within 30 days, the Account Manager can regenerate the invitation email, allowing the intended Account Designee to self-register.

The previously generated link will not work once a new email is generated. Invitation emails can only be regenerated for Account Designees in “Pending” status. The email will come from [cobva@ghimedicare.com](mailto:cobva@ghimedicare.com).

## Slide 36 of 45 - Designee Listing



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

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

## Designee Listing

This page provides the Designee(s) information for the individuals you have assigned to the account.

An Account Manager can only make changes to a pending Designee. Once the Designee has registered and has a Login ID, the Account Manager cannot make changes to the Designee information other than deleting the Designee from the account.

To make changes to the account of a particular Designee listed, select the link on the individual's last name. To delete a Designee select the Delete function to the left of the individual's name. Use the **Add a Designee** function to include an individual as a designee. Individuals added as designees will receive an e-mail notifying them that they have been invited to be a designee for the account.

Selecting **Continue** will return to the Home Page.

Total Number of Account Designees: 2

Clear Filters

Delete	Last Name	First Name	E-mail Address	Passphrase	Status	Last Login Date
<input type="checkbox"/>	Search					
<input checked="" type="checkbox"/>	<a href="#">Jones</a>	Pam	pjones@abc.com	jones	Pending	
<input checked="" type="checkbox"/>	Doe	Jane	jdoe@abc.com	let me in	Active	04/08/2017

Add a Designee Return Home

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

## Slide notes

On the Designee Listing page, click the last name of the Designee that needs the email regenerated.



**Slide 37 of 45 - Update Designee Information**

The screenshot shows the 'Update Designee Information' page. At the top, there are logos for CMS (Center for Medicare & Medicaid Services) and COB&R (Coordination of Benefits and Recovery), along with the title 'Workers' Compensation Set-Aside Web Portal'. A navigation bar includes links for Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Logoff, with a 'Skip Navigation' link on the right. The main heading is 'Update Designee Information'. Below this, a paragraph instructs the user to click 'Next' to check the E-Mail Address of a potential designee, or 'Previous' to return to the Designee Listing page. A note states that an asterisk (\*) indicates a required field and that the e-mail address is used for verification. The form contains several input fields: 'Designee First Name' (Pam), 'Designee Last Name' (Jones), 'Designee E-mail Address' (pjones@abc.com), 'Re-enter Designee E-mail Address' (pjones@abc.com), 'Passphrase' (jones), and 'Re-enter Passphrase' (jones). A checkbox labeled 'Regenerate token. Check this box if another invitation email must be sent to the Designee.' is checked. At the bottom of the form are 'Previous' and 'Next' buttons. A 'QUICK HELP' box on the right contains a link 'Help About This Page'. The footer includes links for CMS/HHS Vulnerability Disclosure Policy, Privacy Policy, User Agreement, and Adobe Acrobat.

**Update Designee Information**

Please click the 'Next' button to check the E-Mail Address of a potential designee. To cancel and return to the Designee Listing page, click the 'Previous' button.

An asterisk (\*) indicates a required field. We ask for the e-mail address to verify if the person is currently a registered user.

Designee First Name: \* Pam

Designee Last Name: \* Jones

Designee E-mail Address: \* pjones@abc.com

Re-enter Designee E-mail Address: \* pjones@abc.com

Passphrase: \* jones

Re-enter Passphrase: \* jones

☒ Regenerate token. Check this box if another invitation email must be sent to the Designee.

Previous Next

QUICK HELP  
[Help About This Page](#)

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

**Slide notes**

The Update Designee Information page appears, with the Designee's personal information open for editing.

**Slide 38 of 45 - Update Designee Information**

**Update Designee Information**

Please click the 'Next' button to check the E-Mail Address of a potential designee. To cancel and return to the Designee Listing page, click the 'Previous' button.

An asterisk (\*) indicates a required field. We ask for the e-mail address to verify if the person is currently a registered user.

Designee First Name: \* Pam

Designee Last Name: \* Jones

Designee E-mail Address: \* pjones@abc.com

Re-enter Designee E-mail Address: \* pjones@abc.com

Passphrase: \* jones

Re-enter Passphrase: \* jones

☒ Regenerate token. Check this box if another invitation email must be sent to the Designee.

Previous Next

**QUICK HELP**  
[Help About This Page](#)

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

**Slide notes**

Select the Regenerate token check box beneath the Designee's personal information and then click Next.

## Slide 39 of 45 - Designee Listing

The screenshot shows the 'Designee Listing' page of the 'Workers' Compensation Set-Aside Web Portal'. The page header includes the CMS logo (Center for Medicare & Medicaid Services) 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 'Designee Listing'. Below it, a paragraph states: 'This page provides the Designee(s) information for the individuals you have assigned to the account.' To the right, a 'QUICK HELP' box contains a link 'Help About This Page'.

Two instructional paragraphs follow:
 

- 'An Account Manager can only make changes to a pending Designee. Once the Designee has registered and has a Login ID, the Account Manager cannot make changes to the Designee information other than deleting the Designee from the account.'
- 'To make changes to the account of a particular Designee listed, select the link on the individual's last name. To delete a Designee select the Delete function to the left of the individual's name. Use the **Add a Designee** function to include an individual as a designee. Individuals added as designees will receive an e-mail notifying them that they have been invited to be a designee for the account.'

Below the instructions, it says 'Selecting **Continue** will return to the Home Page.' and 'Total Number of Account Designees: 2'.

A 'Clear Filters' button is located above a table. The table has columns: Delete, Last Name, First Name, E-mail Address, Passphrase, Status, and Last Login Date. There is a search bar with a 'Search' button and a dropdown arrow. The table contains two rows of designee information:

Delete	Last Name	First Name	E-mail Address	Passphrase	Status	Last Login Date
<input type="checkbox"/>	<a href="#">Jones</a>	Pam	pjones@abc.com	jones	Pending	
<input type="checkbox"/>	Doe	Jane	jdoe@abc.com	let me in	Active	04/08/2017

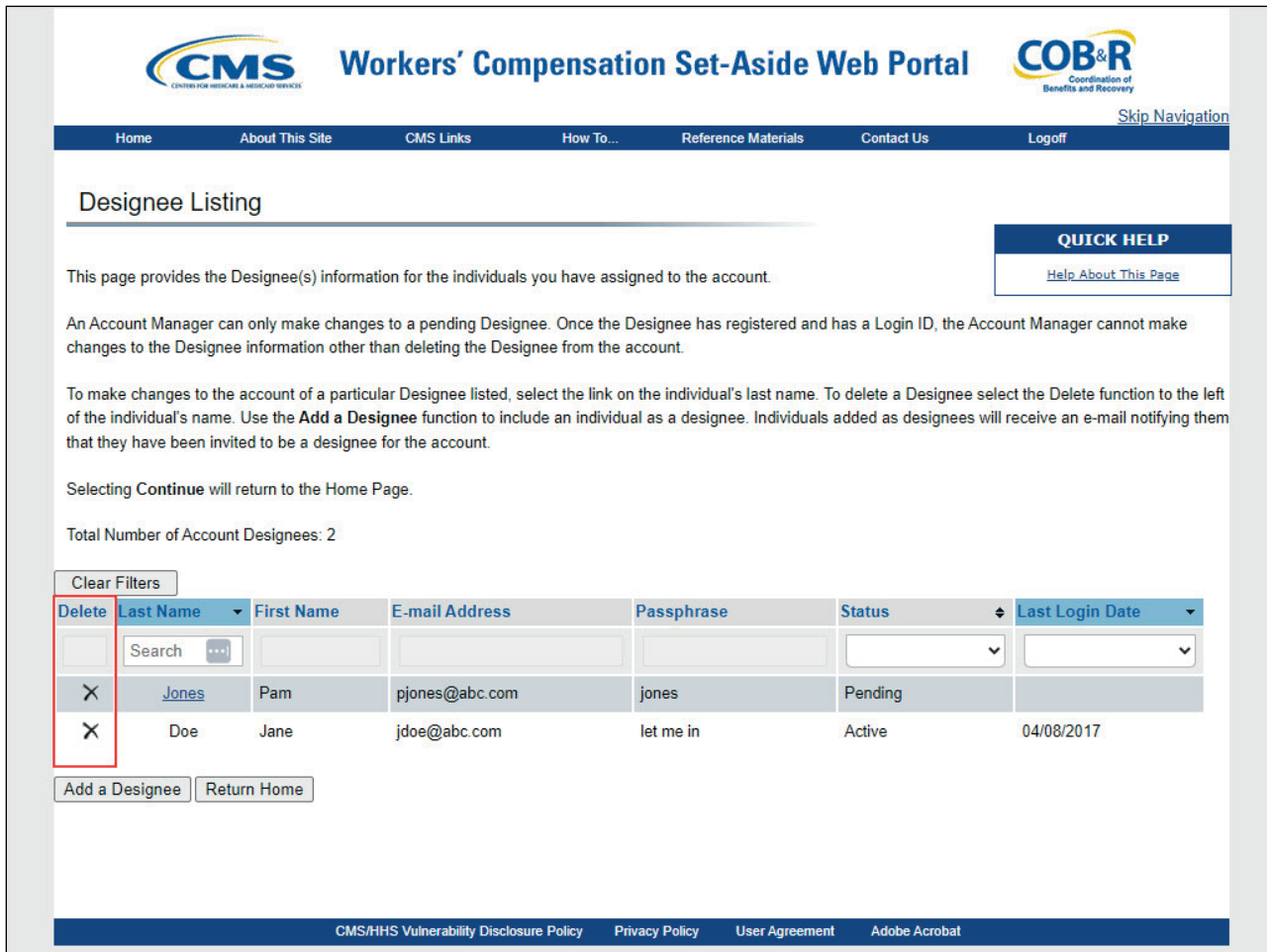
At the bottom of the table area are two buttons: 'Add a Designee' and 'Return Home'.

The footer contains links for 'CMS/HHS Vulnerability Disclosure Policy', 'Privacy Policy', 'User Agreement', and 'Adobe Acrobat'.

## Slide notes

The Designee Listing page re-appears, with the Designee's information unchanged. However, the system re-generates the invitation email and sends it to the email address registered for the Account Designee.

## Slide 40 of 45 - Designee Listing



**Designee Listing**

This page provides the Designee(s) information for the individuals you have assigned to the account.

An Account Manager can only make changes to a pending Designee. Once the Designee has registered and has a Login ID, the Account Manager cannot make changes to the Designee information other than deleting the Designee from the account.

To make changes to the account of a particular Designee listed, select the link on the individual's last name. To delete a Designee select the Delete function to the left of the individual's name. Use the **Add a Designee** function to include an individual as a designee. Individuals added as designees will receive an e-mail notifying them that they have been invited to be a designee for the account.

Selecting **Continue** will return to the Home Page.

Total Number of Account Designees: 2

Clear Filters

Delete	Last Name	First Name	E-mail Address	Passphrase	Status	Last Login Date
<input type="checkbox"/>	<input type="text" value="Search"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/>	<a href="#">Jones</a>	Pam	pjones@abc.com	jones	Pending	
<input checked="" type="checkbox"/>	Doe	Jane	jdoe@abc.com	let me in	Active	04/08/2017

[Add a Designee](#) [Return Home](#)

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

## Slide notes

To delete an Account Designee, click the X button next to the individual's name.

The Delete Designee Confirmation page will appear.

**Slide 41 of 45 - Delete Designee Confirmation**

The screenshot shows a web portal interface. At the top, there are logos for CMS (Center for Medicare & Medicaid Services) and COB&R (Coordination of Benefits and Recovery). The main title is 'Workers' Compensation Set-Aside Web Portal'. Below the title is a navigation bar with 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 'Delete Designee Confirmation'. The text explains that clicking 'Continue' will remove the individual from the Account ID, while clicking 'Cancel' will return to the Designee Listing page. The designee's details are listed: Designee First Name: Timothy, Designee Last Name: Baker, and Designee Email: tbaker@abc.com. At the bottom, there are two buttons: 'Cancel' and 'Continue'. The footer contains links to CMS/HHS Vulnerability Disclosure Policy, Privacy Policy, User Agreement, and Adobe Acrobat.

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

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

### Delete Designee Confirmation

Please click on the **Continue** button to confirm your delete request for this Account Designee. This will remove the individual from this Account ID only. The Designee will no longer have access to this Account ID but will retain access to any other accounts to which he/she is currently associated.

Click on the **Cancel** button to return to the Designee Listing page without deleting this Account Designee.

Designee First Name: Timothy  
Designee Last Name: Baker  
Designee Email: tbaker@abc.com

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

**Slide notes**

If the Account Manager does not want to delete this Account Designee, they will click the Cancel button to return to the Designee Listing page which will show the Account Designee is still listed with their status unchanged.

If the Account Manager does want to delete this Account Designee from the WCMSAP account, they will click the Continue button.

## Slide 42 of 45 - Deleted Information Verification

**Designee Listing**

This page provides the Designee(s) information for the individuals you have assigned to the account.

An Account Manager can only make changes to a pending Designee. Once the Designee has registered and has a Login ID, the Account Manager cannot make changes to the Designee information other than deleting the Designee from the account.

To make changes to the account of a particular Designee listed, select the link on the individual's last name. To delete a Designee select the Delete function to the left of the individual's name. Use the **Add a Designee** function to include an individual as a designee. Individuals added as designees will receive an e-mail notifying them that they have been invited to be a designee for the account.

Selecting **Continue** will return to the Home Page.

Total Number of Account Designees: 2

Clear Filters

Delete	Last Name	First Name	E-mail Address	Passphrase	Status	Last Login Date
<input type="checkbox"/>	<a href="#">Jones</a>	Pam	pjones@abc.com	jones	Pending	
<input type="checkbox"/>	<a href="#">Doe</a>	Jane	jdoe@abc.com	let me in	Active	04/08/2017

[Add a Designee](#) [Return Home](#)

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

## Slide notes

This removes the Account Designee from this Account ID only. The deleted individual will no longer have access to this WCMSAP account.

However, the Account Designee will retain access to any other Account ID they are currently associated with. The Designee Listing page reappears without the Account Designee who was just deleted.

**Slide 43 of 45 - Course Summary**

## Course Summary



You are now be able to:

- Identify the role of Account Manager
- Discuss the Basic Function of the Account Manager
  - Managing Account Profile
  - Conduct Designee Maintenance



### Slide notes

You are now able to identify the role of the Account Manager and the basic functions of the Account Manager including managing the account profile and conducting designee maintenance.

**Slide 44 of 45 - Conclusion**

You have completed the WCMSAP Basic Functions - Account Manager course. The information in this course can be referenced by using the document at the link below:

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



**Slide notes**

You have completed the WCMSAP Basic Functions - Account Manager course. The information on this course can be referenced by using the document at the link below.

[WCMSAP User Guide.](#)



**Slide 45 of 45 - 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 to the following URL: [WCMSAP Training Survey](#).