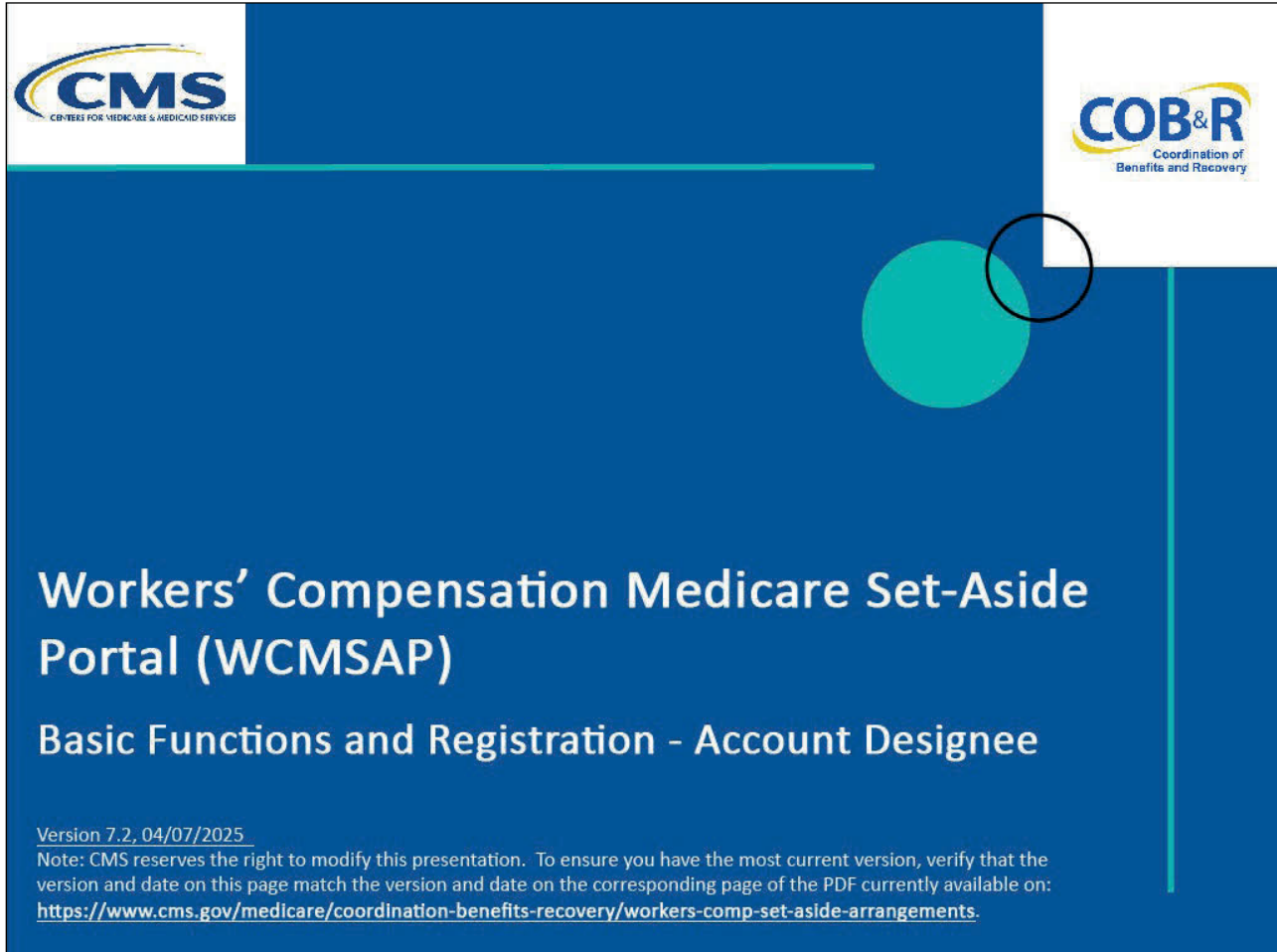


Basic Functions and Registration - Account Designee

Slide 1 of 22 - Basic Functions and Registration - Account Designee



The slide features a blue background with a large teal circle on the right side. In the top left corner is the CMS logo (Centers for Medicare & Medicaid Services). In the top right corner is the COB&R logo (Coordination of Benefits and Recovery). The main title is "Workers' Compensation Medicare Set-Aside Portal (WCMSAP)" in white text. Below it is the subtitle "Basic Functions and Registration - Account Designee" in white text. At the bottom left, there is a version number "Version 7.2, 04/07/2025" and a note: "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>."

CMS
CENTERS FOR MEDICARE & MEDICAID SERVICES

COB&R
Coordination of
Benefits and Recovery

Workers' Compensation Medicare Set-Aside Portal (WCMSAP)

Basic Functions and Registration - Account Designee

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 & Registration - Account Designee course.

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>.

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 22 - Course Overview

Course Overview

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

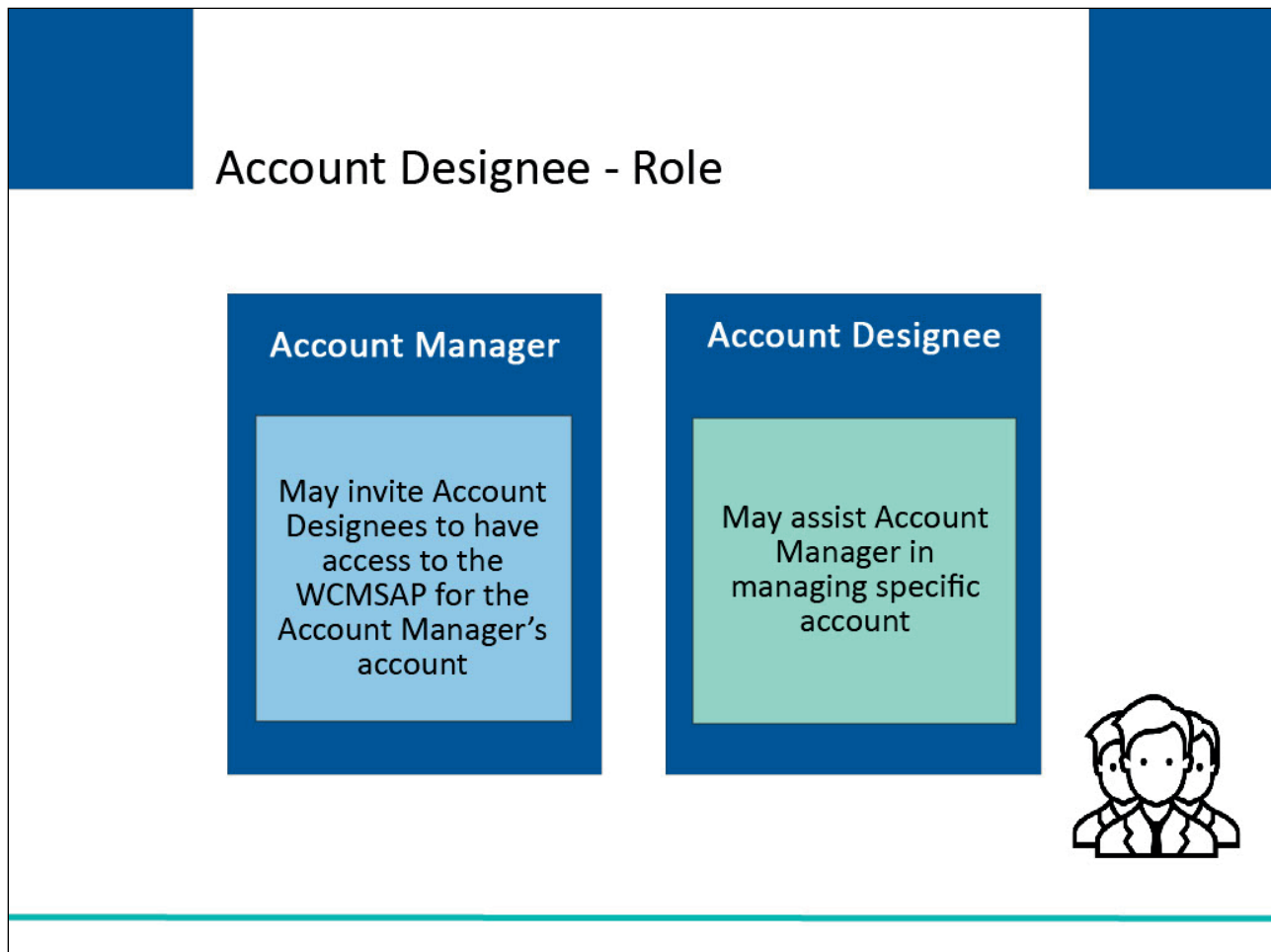
- Explain the role of the Account Designee
- Discuss the basic functions of the Account Designee
- Complete registration as the Account Designee



Slide notes

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

- Explain the role of the Account Designee,
- Discuss the basic functions of the Account Designee, and
- Complete registration as the Account Designee.

Slide 4 of 22 - Account Designee Role**Slide notes**

An Account Manager for Corporate or Representative Account types may invite other individuals, known as Account Designees, to have access to the WCMSAP for the Account Manager's account.

Corporate accounts may have up to 20 Account Designees associated with one WCMSAP account; Representative accounts may have up to 5. Account Designees may assist the Account Manager in managing a specific account.

Note: The Account designee can also be an Account Manager for other accounts. You can also change an Account Designee into an Account Manager by calling your EDI Representative.

Slide 5 of 22 - Basic Functions

Account Designee - Basic Functions

Account Designee can (to their associated account)

- Be associated with multiple WCMSAP accounts (if invited by Account Manager)
- Change personal information
- Submit new cases
- Perform case lookups and view cases
- Update a case (including appending documentation)
- Replace documentation
- Access alerts
- Update work-in-progress information

Account Designee cannot

- Be an Account Representative for any WCMSAP account
- Be the Account Manager for the same WCMSAP account
- Invite other users to the WCMSAP account
- Update WCMSAP account information

Slide notes

Account Designees can be associated with multiple WCMSAP accounts but only if invited by the Account Manager for those accounts. They are able to:

- Change their personal information on the WCMSAP;
- Submit new cases for a given WCMSAP account;
- Perform case lookups and view cases with which they are associated (cases submitted by the Account Designee or assigned to them by the Account Manager);
- Update (append documentation too) a case that they have been associated with;
- Replace documentation for cases that they have been associated with;
- Access alerts for cases that they have been associated with; and
- Update work-in-progress case information for cases that they have created or are associated with, as assigned by the Account Manager.

Account Designees cannot be an Account Representative for any WCMSAP account, be the Account Manager for the same WCMSAP account, invite other users to the WCMSAP account, or update WCMSAP account information.

Slide 6 of 22 - Account Designee Registration

Account Designee - Registration

Account Designees are required to register once on the WCMSAP and obtain a Login ID and Password

Account Designee will begin by clicking URL in invitation email from cobva@ghimedicare.com

- Email contains specific token link
- Token link becomes inactive after 30 days of non-use
- Will also need Passphrase from Account Manager

Slide notes

Account Designees are required to register on the WCMSAP and obtain a Login ID and Password before they can use the system.

The Account Designee will only register once.

Only one Login ID is needed no matter how many account IDs they will ultimately be associated with.

The Account Designee will begin the registration process by clicking on the URL in the invitation email that was sent by the Benefits Coordination & Recovery Center (BCRC).


The email will come from cobva@ghimedicare.com.

Ensure that your spam filter software has been updated to allow receipt from this email address.

The URL in this email contains a specific token which grants access to the registration site.

The token link becomes inactive after 30 days of non-use, so it is imperative that the Account Designee registers as soon as possible after receiving the invitation email.

Slide 7 of 22 - Login Warning

[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 and may result in disciplinary action and/or civil and criminal penalties.

Personal use of social media and networking sites on this system is limited as to not interfere with official work duties and is subject to monitoring.

By using this system, you understand and consent to the following:

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.

Privacy Act Statement

The collection of this information is authorized by Section 1862(b) of the Social Security Act (codified at 42 U.S.C 1395y(b)) (see also 42, C.F.R. 411.24). The information collected will be used to identify and recover past conditional and mistaken Medicare primary payments and to prevent Medicare from making mistaken payments in the future for those Medicare Secondary Payer situations that continue to exist. The Privacy Act (5 U.S.C. 552a(b)), as amended, prohibits the disclosure of information maintained by the Centers for Medicare & Medicaid Services (CMS) in a system of records to third parties, unless the beneficiary provides a written request or explicit written consent/authorization for a party to receive such information. Where the beneficiary provides written consent/proof of representation, CMS will permit authorized parties to access requisite information.

Attestation of Information

The information provided is complete, truthful, accurate, and meets all requirements set forth to use this process.

LOG OFF IMMEDIATELY if you do not agree to the conditions stated in this warning.

[I Accept](#)
[Decline](#)

Slide notes

Once the URL in the invitation email has been clicked, the Login Warning page will appear, detailing the Data Use Agreement (DUA).

The DUA provides information about WCMSAP security measures including access, penalty, and privacy laws.

All users must agree to the terms of this warning each time they access the WCMSAP application.

Slide 8 of 22 - Login Warning

[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 and may result in disciplinary action and/or civil and criminal penalties.

Personal use of social media and networking sites on this system is limited as to not interfere with official work duties and is subject to monitoring.

By using this system, you understand and consent to the following:

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.

Privacy Act Statement

The collection of this information is authorized by Section 1862(b) of the Social Security Act (codified at 42 U.S.C. 1395y(b)) (see also 42 C.F.R. 411.24). The information collected will be used to identify and recover past conditional and mistaken Medicare primary payments and to prevent Medicare from making mistaken payments in the future for those Medicare Secondary Payer situations that continue to exist. The Privacy Act (5 U.S.C. 552a(b)), as amended, prohibits the disclosure of information maintained by the Centers for Medicare & Medicaid Services (CMS) in a system of records to third parties, unless the beneficiary provides a written request or explicit written consent/authorization for a party to receive such information. Where the beneficiary provides written consent/proof of representation, CMS will permit authorized parties to access requisite information.

Attestation of Information

The information provided is complete, truthful, accurate, and meets all requirements set forth to use this process.

LOG OFF IMMEDIATELY if you do not agree to the conditions stated in this warning.

[I Accept](#)
[Decline](#)

Slide notes

Users must review the DUA and click the [I Accept] link at the bottom of the page to continue otherwise they will be denied access to the WCMSAP site and will be unable to register.

Slide 9 of 22 - Designee Registration

The screenshot shows the 'Designee Registration' 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. The main heading is 'Designee Registration'. Below this, a message states: 'The Account Manager listed below has invited you to be a Designee for the following account:'. To the right, there is a 'QUICK HELP' button with a link 'Help About This Page'. The 'Submitter Information' section shows 'Submitter ID: 122154'. The 'Account Manager Information' section lists: 'First Name: Jon', 'Phone: 226-885-4545 ext. 5656', and 'E-Mail: jon.doe@email.com'. A message follows: 'To set up a Login ID for you to act as a Designee, you will need the pass-phrase created by the Account Manager. If you do not have the pass-phrase, please contact the above Account Manager.' Below this, it says: 'If you have already registered, please visit the Workers' Compensation Medicare Set-Aside Welcome Page at <https://www.imp.cob.cms.hhs.gov/WCMSA/> to login.' There is a label 'Enter the passphrase:' followed by a text input field. A message then states: 'You must read the User Agreement and Privacy Policy provided in the scrolling box. To accept the agreement, click the checkbox. You must accept and agree to the terms of the User Agreement and Privacy Policy to continue with the registration process.' Below this is a link: '[View and print the User Agreement and Privacy Policy below.](#)'. At the bottom, there is a scrolling box titled 'User Agreement and Privacy Policy'.

Slide notes

If the Account Designee accepts the terms of the Login Warning, the Designee Registration page will appear.

The Designee Registration page informs the user that they have been assigned as an Account Designee for the listed Account ID.

Slide 10 of 22 - Designee Registration

The screenshot shows the 'Designee Registration' page of the Workers' Compensation Set-Aside Web Portal. The page header includes the CMS logo, the portal title, and the COB&R logo. A navigation bar contains 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 heading is 'Designee Registration'. Below this, a message states: 'The Account Manager listed below has invited you to be a Designee for the following account:'. To the right, there is a 'QUICK HELP' button with a link 'Help About This Page'. The 'Submitter Information' section shows 'Submitter ID: 122154'. The 'Account Manager Information' section lists: 'First Name: Jon', 'Phone: 226-885-4545 ext. 5656', and 'E-Mail: jon.doe@email.com'. A message follows: 'To set up a Login ID for you to act as a Designee, you will need the pass-phrase created by the Account Manager. If you do not have the pass-phrase, please contact the above Account Manager.' Another message states: 'If you have already registered, please visit the Workers' Compensation Medicare Set-Aside Welcome Page at <https://www.imp.cob.cms.hhs.gov/WCMSA/> to login.' Below this is a text input field labeled 'Enter the passphrase:'. A message then states: 'You must read the User Agreement and Privacy Policy provided in the scrolling box. To accept the agreement, click the checkbox. You must accept and agree to the terms of the User Agreement and Privacy Policy to continue with the registration process.' A link 'View and print the User Agreement and Privacy Policy below.' is provided. At the bottom, there is a scrolling box titled 'User Agreement and Privacy Policy'.

Slide notes

The Account Designee will enter the Passphrase given to them by the Account Manager.

Note: The Passphrase is case-sensitive. It must be entered exactly as it was given by the Account Manager.

Slide 11 of 22 - Review User Agreement

Account manager information

First Name: Jon
Phone: 226-885-4545 ext. 5656
E-Mail: jon.doe@email.com

To set up a Login ID for you to act as a Designee, you will need the pass-phrase created by the Account Manager.
If you do not have the pass-phrase, please contact the above Account Manager.

If you have already registered, please visit the Workers' Compensation Medicare Set-Aside Welcome Page at <https://www.imp.cob.cms.hhs.gov/WCMSA/> to login.

Enter the passphrase:

You must read the User Agreement and Privacy Policy provided in the scrolling box. To accept the agreement, click the checkbox.
You must accept and agree to the terms of the User Agreement and Privacy Policy to continue with the registration process.

[View and print the User Agreement and Privacy Policy below.](#)

User Agreement and Privacy Policy

THE FOLLOWING DESCRIBES THE TERMS AND CONDITIONS BY WHICH THE CENTERS FOR MEDICARE MEDICAID SERVICES (CMS) OFFERS YOU ACCESS TO THE COORDINATION OF BENEFITS SECURE WEBSITE (COBSW).

You must read and accept the terms and conditions contained in this User Agreement expressly set out below and incorporated by reference before you may access the Coordination of Benefits Secure Website (COBSW), which includes the Medicare Secondary Payer Repayment Portal (MSRP), the Commercial Repayment Center Portal (CRCP), the Section 111 Mandatory Reporting

Please check the following box:

* ☐ I accept the User Agreement and Privacy Policy above.

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

Slide notes

The Account Designee must review the User Agreement, check the box to accept the terms, and click Next to continue.

Slide 12 of 22 - Personal Information

The screenshot displays the 'Designee Personal 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 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 is titled 'Designee Personal Information' and includes a 'QUICK HELP' button with a 'Help About This Page' link. A note states: 'An asterisk (*) indicates a required field.' The form contains the following fields: First Name: * (text box), MI: (text box), Last Name: * (text box), E-mail Address: * johnsmith@abc.com (text box), Phone: * ((text box))(text box) - ext. (text box), Mailing Address: Address Line 1: * (text box), Address Line 2: (text box), City: * (text box), State: * (-Select- (dropdown menu)), and Zip Code: * (text box). At the bottom of the form are 'Previous' and 'Next' buttons. The footer contains links for CMS/HHS Vulnerability Disclosure Policy, Privacy Policy, User Agreement, and Adobe Acrobat.

Designee Personal Information

QUICK HELP
[Help About This Page](#)

An asterisk (*) indicates a required field.

First Name: * MI: Last Name: *

E-mail Address: * johnsmith@abc.com

Phone: * () - - ext.

Mailing Address:

Address Line 1: *

Address Line 2:

City: *

State: * -Select-

Zip Code: *

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

Slide notes

The Designee Personal Information page will appear. Enter the required information and click Next to continue. Note: Required fields are denoted by an asterisk (*).

Slide 13 of 22 - Designee Login Information

The screenshot shows the 'Designee Login Information' 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 Login Information'. A paragraph explains that the security information is for authentication and access restriction. A 'QUICK HELP' box with a 'Help About This Page' link is on the right. A section titled 'Choose your Login ID and password carefully.' lists requirements for login IDs and passwords. Below this, a note states that an asterisk (*) indicates a required field. Three input fields are provided: 'Login ID *', 'Password *', and 'Re-enter Password *'. A final paragraph explains the purpose of Security Questions for account recovery.

Designee 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 an Account Designee.

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 be different from the last twenty four (24) passwords
- Password must contain a minimum of four (4) changed characters from the previous password.
- Password cannot be changed more than once per day
- 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

The Designee Login Information page will appear. The Account Designee must set up a Login ID and Password and select their Security Questions.

Slide 14 of 22 - Password

Designee Login Information

- Password
 - Must be changed every 60 days
 - Must be 8 characters in length
 - Must contain a mix of upper case letters, lower case letters, and numbers and a special character
 - Cannot be changed more than
 - Does not contain 4 consecutive characters from the previous password
 - Must be different from the last 6
 - Cannot contain reserved words

**Slide notes**

When choosing a password, ensure that:

- Login IDs are 7 characters,
- Login IDs are in the format of AA999AA (first two alphabetic, next three numeric, last two alphabetic),
- Password is changed every 60 days,
- Is 8 characters in length,
- Contains at least one upper-case letter,
- One lowercase letter,
- one number,
- One special character,
- is not changed more than once per day,
- Does not contain 4 consecutive characters from the previous password,
- Is different from the last 6 Passwords, and
- Does not contain a reserved word.

Slide 15 of 22 - Security Questions

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 be different from the last twenty four (24) passwords
- Password must contain a minimum of four (4) changed characters from the previous password.
- Password cannot be changed more than once per day
- 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 *

Answer 1 *

Security Question 2 *

Answer 2 *

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

Slide notes

The Security Questions will be used to assist the Account Designee in regaining account access if they forget their password.

The answers provided to these questions should be actual answers and not hints for the password.

Enter all required information and then click Next to continue.

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

Slide 16 of 22 - Designee Summary

The screenshot shows the 'Designee Summary' page of the Workers' Compensation Set-Aside Web Portal. The page header includes the CMS logo, the portal title, and the COB&R 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. The main heading is 'Designee Summary'. To the right, there is a 'Print this page' icon and a 'QUICK HELP' section with a 'Help About This Page' link. A paragraph of instructions states: '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 Registration' button to submit your information. Click 'Cancel' to cancel the setup process, all data will be lost. Print this page for your records.' The 'Personal Information' section includes an 'Edit' button (highlighted with a red box) and fields for First Name (Jane), MI (A), Last Name (Smith), E-Mail Address (jsmith@abcassociates.com), and Phone (410- 832- 8350 ext. 9877). The 'Login ID' section includes an 'Edit' button (highlighted with a red box) and a Login ID field (AA123bb). The 'Mailing Address' section includes fields for Address Line 1 (200 Test Avenue), Address Line 2 (Suite 2-B), City (Towson), State (Maryland), and Zip Code (21204- 3276). At the bottom, there are three buttons: 'Previous', 'Submit Registration', and 'Cancel'. The footer contains links to CMS/HHS Vulnerability Disclosure Policy, Privacy Policy, User Agreement, and Adobe Acrobat.

Designee Summary

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 Registration' button to submit your information. Click 'Cancel' to cancel the setup process, all data will be lost. 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

Slide notes

The Designee Summary page will appear.

This page provides a summary of the information that has been entered during the Account Designee registration process.

Review this page for accuracy and completeness.

To make any corrections, click the Edit button next to the section that requires updates.

This action will return the user to the corresponding page.

Slide 17 of 22 - Updating Your Information

The screenshot displays the 'Designee Personal Information' form within the 'Workers' Compensation Set-Aside Web Portal'. The portal header includes the CMS logo, the title 'Workers' Compensation Set-Aside Web Portal', and the COB&R logo. A navigation bar contains links: Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, Logoff, and Skip Navigation. The form itself is titled 'Designee Personal Information' and includes a 'QUICK HELP' button with a link to 'Help About This Page'. A red box highlights the form fields, which include: a note that an asterisk (*) indicates a required field; First Name (*), MI, and Last Name (*) fields; an E-mail Address field pre-filled with 'johnsmith@abc.com'; a Phone field with area code, number, and extension sub-fields; a Mailing Address section with Address Line 1 (*), Address Line 2, City, State (a dropdown menu currently showing '-Select-'), and Zip Code (*) fields. At the bottom of the form are 'Previous' and 'Next' buttons. The footer of the portal contains links to CMS/HHS Vulnerability Disclosure Policy, Privacy Policy, User Agreement, and Adobe Acrobat.

Designee Personal Information

QUICK HELP
[Help About This Page](#)

An asterisk (*) indicates a required field.

First Name: * MI: Last Name: *

E-mail Address: * johnsmith@abc.com

Phone: * () - - ext.

Mailing Address:

Address Line 1: *

Address Line 2:

City: *

State: * -Select- ▼

Zip Code: *

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

Slide notes

Change any of the information as needed and click Next to navigate back to the Designee Summary page.

Slide 18 of 22 - Designee Summary

The screenshot shows the 'Designee Summary' page of the Workers' Compensation Set-Aside Web Portal. The page header includes the CMS logo, the portal title, and the COB&R 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. The main heading is 'Designee Summary'. To the right, there is a 'Print this page' icon and a 'QUICK HELP' box with a 'Help About This Page' link. A paragraph of instructions states: '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 Registration' button to submit your information. Click 'Cancel' to cancel the setup process, all data will be lost. Print this page for your records.' Below this, there are two sections: 'Personal Information' and 'Login ID', each with an 'Edit' button. The 'Personal Information' section displays: First Name: Jane MI: A Last Name: Smith, E-Mail Address: jsmith@abcassociates.com, and Phone: 410- 832- 8350 ext. 9877. The 'Login ID' section displays: Login ID: AA123bb. A 'Mailing Address' section follows, displaying: 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 area are three buttons: 'Previous', 'Submit Registration', and 'Cancel'. The footer contains links to CMS/HHS Vulnerability Disclosure Policy, Privacy Policy, User Agreement, and Adobe Acrobat.

Designee Summary

[Print this page](#)

QUICK HELP
[Help About This Page](#)

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 Registration' button to submit your information. Click 'Cancel' to cancel the setup process, all data will be lost. Print this page for your records.

Personal Information [Edit](#)

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

Login ID [Edit](#)

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

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

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

Slide notes

When all information has been verified for accuracy and completeness, click Submit Registration.

Slide 19 of 22 - Designee Thank You

The screenshot shows the 'Designee Thank You' page of the Workers' Compensation Set-Aside Web Portal. The page features a blue 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. The main content area has a 'Designee Thank You' heading, a 'Print this page' button, and a message confirming successful registration. A 'Next Steps' section provides instructions on returning to the Welcome page and logging in. A 'QUICK HELP' box with a 'Help About This Page' link is also present. The footer contains links for CMS/HHS Vulnerability Disclosure Policy, Privacy Policy, User Agreement, and Adobe Acrobat.

Designee Thank You

You have successfully completed registration for the Workers' Compensation Set-Aside Web site and established yourself as a Designee for the Account ID. Please print this page for your records.

Next Steps

You may now return to the Workers' Compensation Set-Aside Web site Welcome page, login using the Login ID and Password you just created to access accounts associated with your ID.

You can visit the Workers' Compensation Medicare Set-Aside Welcome Page at <https://www.imp.cob.cms.hhs.gov/WCMSA/>.

QUICK HELP

[Help About This Page](#)

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

Slide notes

The Designee Thank You page will appear stating that the Account Designee has been successfully registered on the WCMSAP.

Click the Workers' Compensation Medicare Set-Aside Welcome page link to go to the WCMSAP Welcome page to log in to the site and manage account information.

Slide 20 of 22 - Course Summary

Course Summary

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

- Explain the role of the Account Designee
- Discuss the basic functions of the Account Designee
- Complete registration as the Account Designee



Slide notes

You should now be able to:

- Explain the role of the Account Designee,
- Discuss the basic functions of the Account Designee, and
- Complete registration as the Account Designee.

Slide 21 of 22 - Conclusion

You have completed the WCMSAP Basic Functions and Registration 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 and Registration course. The information in this course can be referenced by using the document at the link below.

[WCMSAP User Guide](#)

Slide 22 of 22 - 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](#).