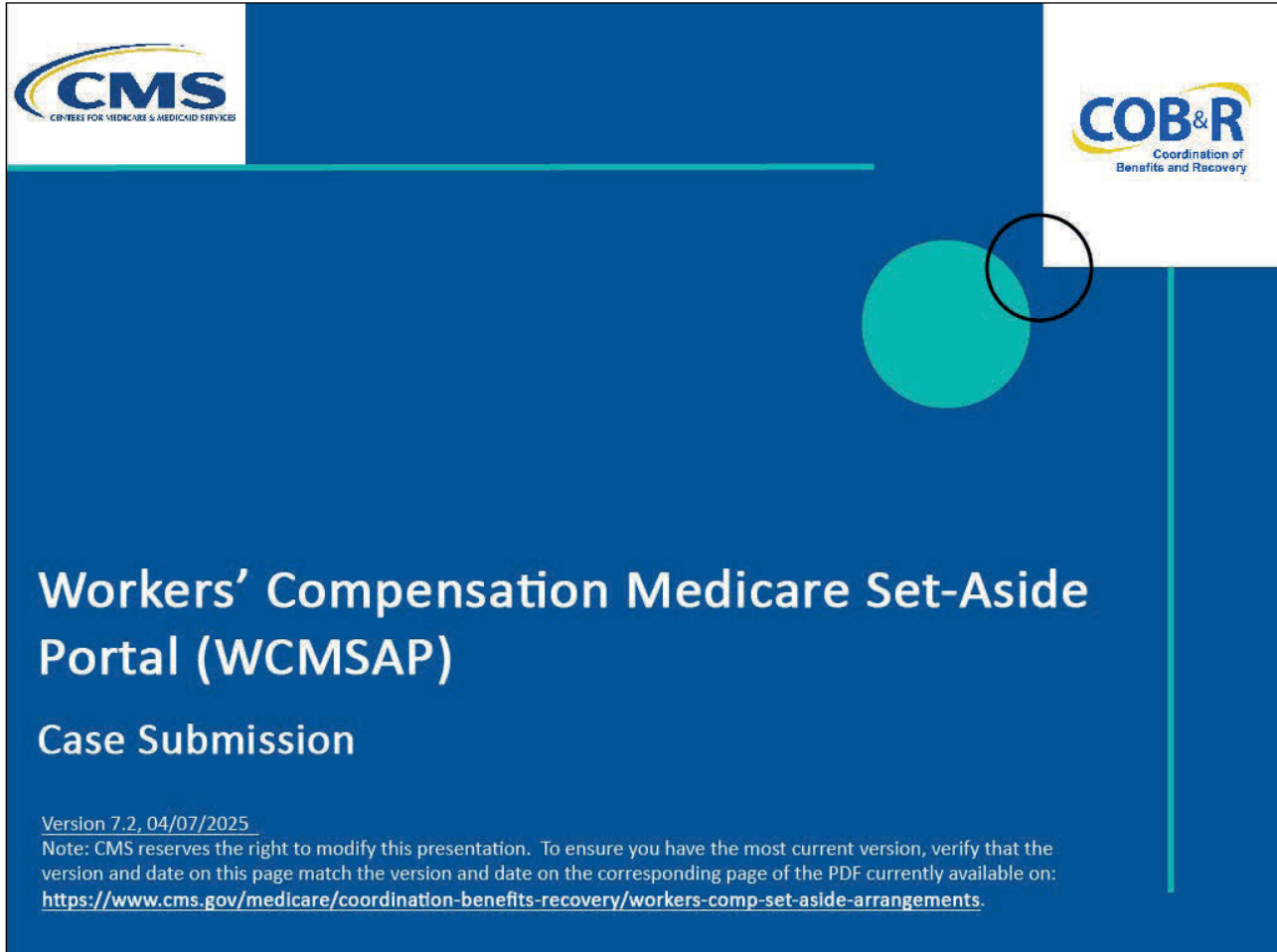


Case Submission

Slide 1 of 66 - Case Submission



CMS
CENTERS FOR MEDICARE & MEDICAID SERVICES

COB&R
Coordination of
Benefits and Recovery

Workers' Compensation Medicare Set-Aside Portal (WCMSAP)

Case Submission

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) Case Submission Course.

Slide 2 of 66 - 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](https://www.cms.gov/medicare/coordination-benefits-recovery/workers-comp-set-aside-arrangements).

Slide 3 of 66 - Course Overview

Course Overview

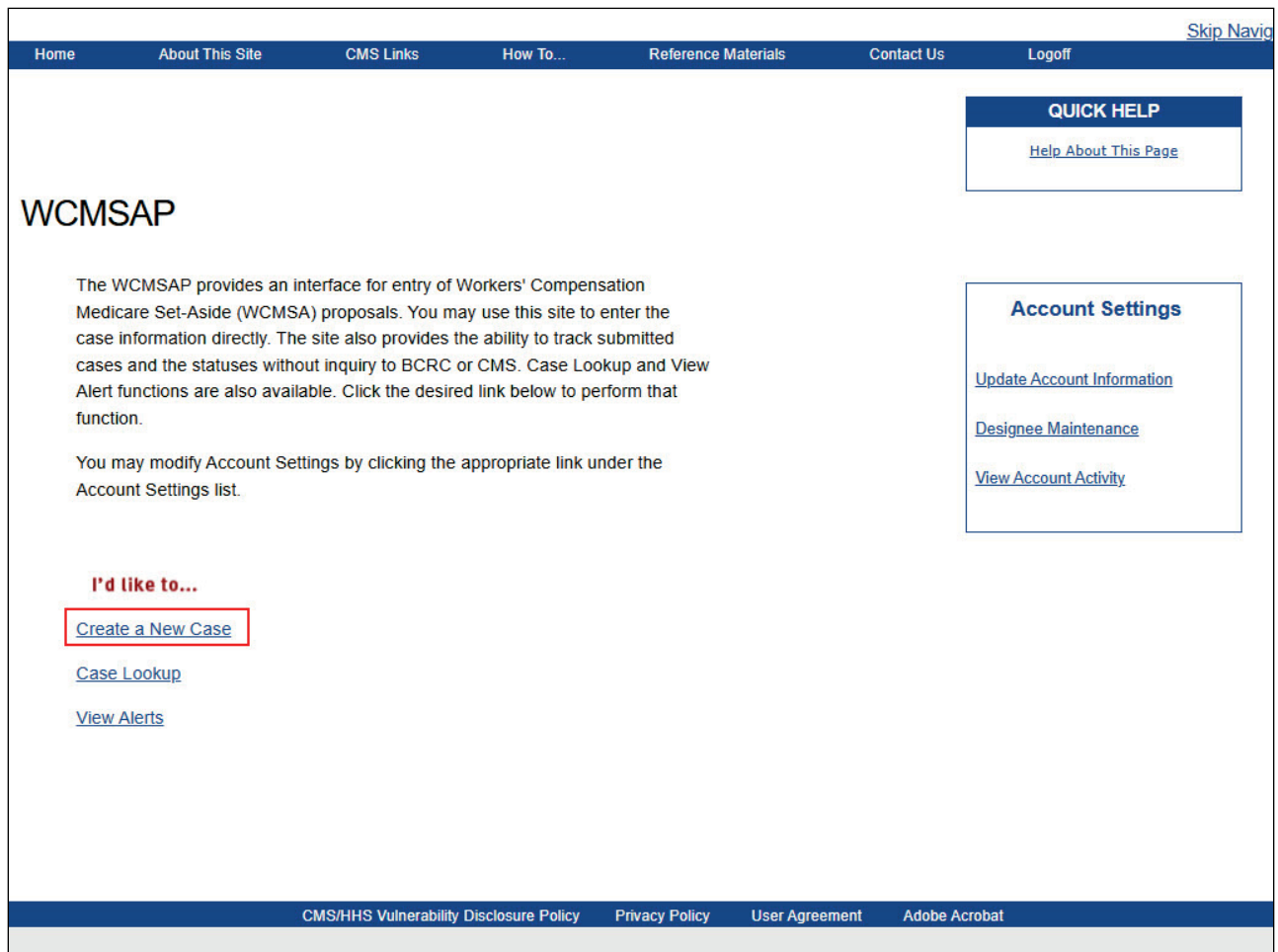
By the end of this course, you will be able to:

- Discuss how to create a case in the WCMSAP
- Describe how to save and edit a work-in progress (WIP) case
- Explain how to submit a WCMSA case
- Complete the yearly attestation information

**Slide notes**

Now that you have completed this course, you will be able to:

- discuss how to create a case in the WCMSAP,
- describe how to save and edit a work-in-progress (WIP) case,
- explain how to submit a WCMSA case, and
- complete the yearly attestation information.

Slide 4 of 66 - Accessing the WCMSAP/Home Page

The screenshot displays the WCMSAP Home Page. At the top, a dark blue navigation bar contains links: Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Logoff. A 'Skip Navigation' link is located in the top right corner. The main content area features the title 'WCMSAP' in large, bold, black text. Below the title, a paragraph explains the system'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, another line of text states: 'You may modify Account Settings by clicking the appropriate link under the Account Settings list.' To the right of the main content, there are two sidebars. The first sidebar, titled 'QUICK HELP', contains a link 'Help About This Page'. The second sidebar, titled 'Account Settings', contains three links: 'Update Account Information', 'Designee Maintenance', and 'View Account Activity'. Below the main text, a section titled 'I'd like to...' is highlighted with a red border. It contains three links: 'Create a New Case' (which is also highlighted with a red border), 'Case Lookup', and 'View Alerts'. At the bottom of the page, a dark blue footer bar contains links: CMS/HHS Vulnerability Disclosure Policy, Privacy Policy, User Agreement, and Adobe Acrobat.

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

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](#)

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

Slide notes

To input Workers' Compensation Medicare Set-Aside (WCMSA) case information, you must first login to the WCMSAP and then Account Designees will then need to select the desired WCMSAP account from the Account Listing page to get to the WCMSAP Home page.

From the WCMSAP Home page, click Create a New Case.

Slide 5 of 66 - Case Creation Page

[Skip Navigation](#)

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

New Case Creation

QUICK HELP
[Help About This Page](#)

The information requested below will be systematically validated to ensure the Workers' Compensation Medicare Set-Aside (WCMSA) case does not already exist in the Web portal and that the data entered meets the criteria set for new case creation. A new WCMSA case should not be created if the beneficiary is deceased or the proposed settlement amount is under the threshold limits set for a WCMSA case. Note: The Total Settlement Amount field will be rounded to the nearest whole dollar amount.

Once the information is validated, you can continue adding case information, upload corresponding documentation in PDF file format, and if necessary, create a work-in-progress case. A work-in-progress case allows you to enter part of the new case information and save it to the WCMSAP. The information saved will be available when you return to the portal to complete the new case creation process.

To begin the new case creation process, enter the required data and click the 'Continue' button. To cancel the case creation, click the 'Cancel' button to return to the Home page.

An asterisk (*) indicates a required field.

The Beneficiary/Claimant's Social Security Number (SSN) or Medicare ID must be provided. You may not provide both. The Initial Date of Injury CCYY may not be less than 1965.

The information below reflects the information provided during initial registration. If this information has changed it may be updated via the "Update Account Information" link on the WCMSAP Home page.

Medicare ID: * OR SSN: * - -

Re-Enter Medicare ID: * OR SSN: * - -

Initial Date of Injury: * / / (MM/DD/CCYY)

Last Name: * First Name: * MI:

Gender: *

Date of Birth: * / / (MM/DD/CCYY)

Proposed Settlement Amount: * \$.

Slide notes

The New Case Creation page will appear. Fields marked with an asterisk are required.

If you are a self-submitter, your Medicare ID (Health Insurance Claim Number (HICN) or the Medicare Beneficiary Identifier (MBI)) or Social Security Number (SSN), Last Name, First Name, Gender, and Date of Birth will be pre-filled and not editable.

The first five bytes of your Medicare ID or SSN will be shown with asterisks. You must enter the Initial Date of Injury (DOI) and proposed settlement amount.

If you are a corporate, professional administrator or representative user, you will be required to enter the Beneficiary's or Claimant's Medicare ID, or SSN, (but not both fields), the Last Name, First Name, Gender, Date of Birth, Initial Date of Injury and Proposed Settlement Amount.

If there are additional dates of injury for a single case, they will be entered on the Case Notes screen which will be discussed later in this CBT.

Slide 6 of 66 - Beneficiary/Claimant Tab

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

Case Information

Beneficiary/Claimant * WCMSA Administrator * Diagnosis Codes * Medical * Prescriptions * WC Carrier * Employer * Attorney

Notes Documents * Summary

Beneficiary/Claimant Information

A superscript ⁽¹⁾ indicates a field required for submission.

Last Name: Doe
First Name: John
MI: A
Beneficiary/Claimant SSN: ***-**-1234
Beneficiary/Claimant Date of Birth: 06/15/1966 (MM/DD/CCYY)
Beneficiary/Claimant Gender: Male
Address Line 1: 123 MAIN STREET
Address Line 2:
City: Windsor Mill
State of Residence: Maryland
Zip Code: 21014 - 1234
Phone: 111-222-3333
State where injury occurred: - Select -
Submitter Type: -Select-

QUICK HELP
[Help About This Page](#)

Next Save Work-In-Progress Case Summary Cancel Case Creation

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

Slide notes

During the new case creation for Beneficiary/Claimants, most fields are pre-populated.

The Beneficiary/Claimant Information included is:

- Last Name,
- First Name,
- Middle Initial,
- Medicare ID and/or SSN,
- Date of Birth,
- Gender,
- Address and
- Phone Number.

The first five bytes of the Medicare ID and/or SSN will be displayed with asterisks. You will be required to enter the State where the injury occurred. The Submitter Type will not appear.

Slide 7 of 66 - WCMSA Administrator Tab

Case Information

Beneficiary/Claimant *

WCMSA Administrator *

Diagnosis Codes *

Medical *

Prescriptions *

WC Carrier *

Employer*

Attorney

Notes

Documents *

Summary

WCMSA Administrator

As part of the new case creation process, you are required to identify the administrator of the WCMSA. The default option is 'Self'. A self-administrator is a Medicare beneficiary who is administering their WCMSA on their own behalf. The Rep Payee option is for non-corporate entities who are administering the WCMSA on behalf of a beneficiary. The Professional Administrator option means that a professional entity will administer and account for the WCMSA that was established to protect Medicare's interests. Click Continue to proceed or save the case as a work-in-progress.

***Note:** When the Administrator Type is 'Professional Administrator', a copy of the Professional Administrator Agreement is required before you can submit this case. You can upload this document on the Documents tab.

An asterisk (*) indicates a required file.

QUICK HELP

[Help About This Page](#)

Administrator Type:*

☒ Self
 ☐ Rep Payee
 ☐ Professional Administrator

Name:

FirstName last

Address Line 1:

One west Penn Ave

Address Line 2:

City:

Towson

State:

Maryland

Zip Code:

43567

-

Phone:

123

-

234

-

4567

Fax:

123

-

234

-

4567

E-mail Address:

TEST@TEST.com

Slide notes

As part of the new case creation process, you are required to identify the administrator of the WCMSA.

The default option is "Self". A Self-Administrator is a Medicare beneficiary who is administering their WCMSA on their own behalf.

The Rep Payee option is for non-corporate entities who are administering the WCMSA on behalf of the beneficiary.

The Professional Administer option means that a professional entity will administer and account for the WCMSA that was established to protect Medicare's interests. When the Professional Administrator type is selected, the Professional Administrator Agreement is required before you can submit the case.

Slide 8 of 66 - Professional Administrator

Case Information

Beneficiary/Claimant *

WCMSA Administrator *

Diagnosis Codes *

Medical *

Prescriptions *

WC Carrier *

Employer*

Attorney

Notes

Documents *

Summary

WCMSA Administrator

As part of the new case creation process, you are required to identify the administrator of the WCMSA. The default option is 'Self'. A self-administrator is a Medicare beneficiary who is administering their WCMSA on their own behalf. The Rep Payee option is for non-corporate entities who are administering the WCMSA on behalf of a beneficiary. The Professional Administrator option means that a professional entity will administer and account for the WCMSA that was established to protect Medicare's interests. Click Continue to proceed or save the case as a work-in-progress.

***Note:** When the Administrator Type is 'Professional Administrator', a copy of the Professional Administrator Agreement is required before you can submit this case. You can upload this document on the Documents tab.

An asterisk (*) indicates a required file.

QUICK HELP

[Help About This Page](#)

Administrator Type:*

☐ Self ☐ Rep Payee ☒ Professional Administrator

Name:*

EIN:*

Address Line 1:*

Address Line 2:*

City:*

State:*

Zip Code:*

Phone:*

Fax:*

E-mail Address:

Re-enter E-mail Address:

Slide notes

If you selected the Administrator Type of Professional Administrator, you will be required to upload a copy under the Set-Aside Administrator or Copy of Agreement “Add Files” link on the Documents tab.

You will see that the document is marked with an asterisk indicating that it is a required form. Select the “Add Files” link and attach your form. You will not be able to submit the case until this document and all other required documents have been added.

Slide 9 of 66 - Existing Cases

Case Already Exists in WCMSAP

- Case must be accessed via the Case Lookup link on the WCMSAP Home page
 - Login ID must be associated to the case

Slide notes

If the case already exists, you will be instructed to access the case via the Case Lookup feature found on the WCMSAP Home page.

However, you can only access a case if your Login ID is associated with the case.

For more information on how to use the Case Lookup feature, please view the [WCMSAP Case Lookup CBT](#).

Slide 10 of 66 - Threshold Limitations

Threshold Limits

- If a case is below CMS' workload review threshold levels, a message will display that states:

Based on the information provided, this case does not meet CMS' workload review threshold level. However, workload review thresholds instituted by CMS are not a substantive dollar or 'Safe Harbor' threshold.

- When the system prevents you from creating a case, you can modify the original values entered and try again

Slide notes

When a WCMSA case is submitted for a current Medicare beneficiary when the total settlement amount is greater than \$25,000.00 or for a claimant that has a "reasonable expectation" of Medicare enrollment within 30 months of the settlement date and the settlement amount is expected to be greater than \$250,000.00, the system will display a message that states: Based on the information provided, this case does not meet CMS' workload review threshold level. However, workload review thresholds instituted by CMS are not a substantive dollar or "safe harbor threshold."

When the system does not allow you to proceed with the creation of a case, you will be allowed to modify the original values entered on the New Case Creation page (except for those values that were pre-filled) and try again.

Slide 11 of 66 - Save Work In-Progress

Save a Work-In-Progress Case

- Allows you to provide partial information for a case
- Allows you to upload a subset of the documentation for a case
- Only data required to save a Work-In-Progress is:
 - Beneficiary/Claimant's Medicare ID and/or SSN
 - Last Name
 - First Name
 - Date of Birth
 - Gender
 - Proposed Settlement Amount
 - Initial Date of Injury

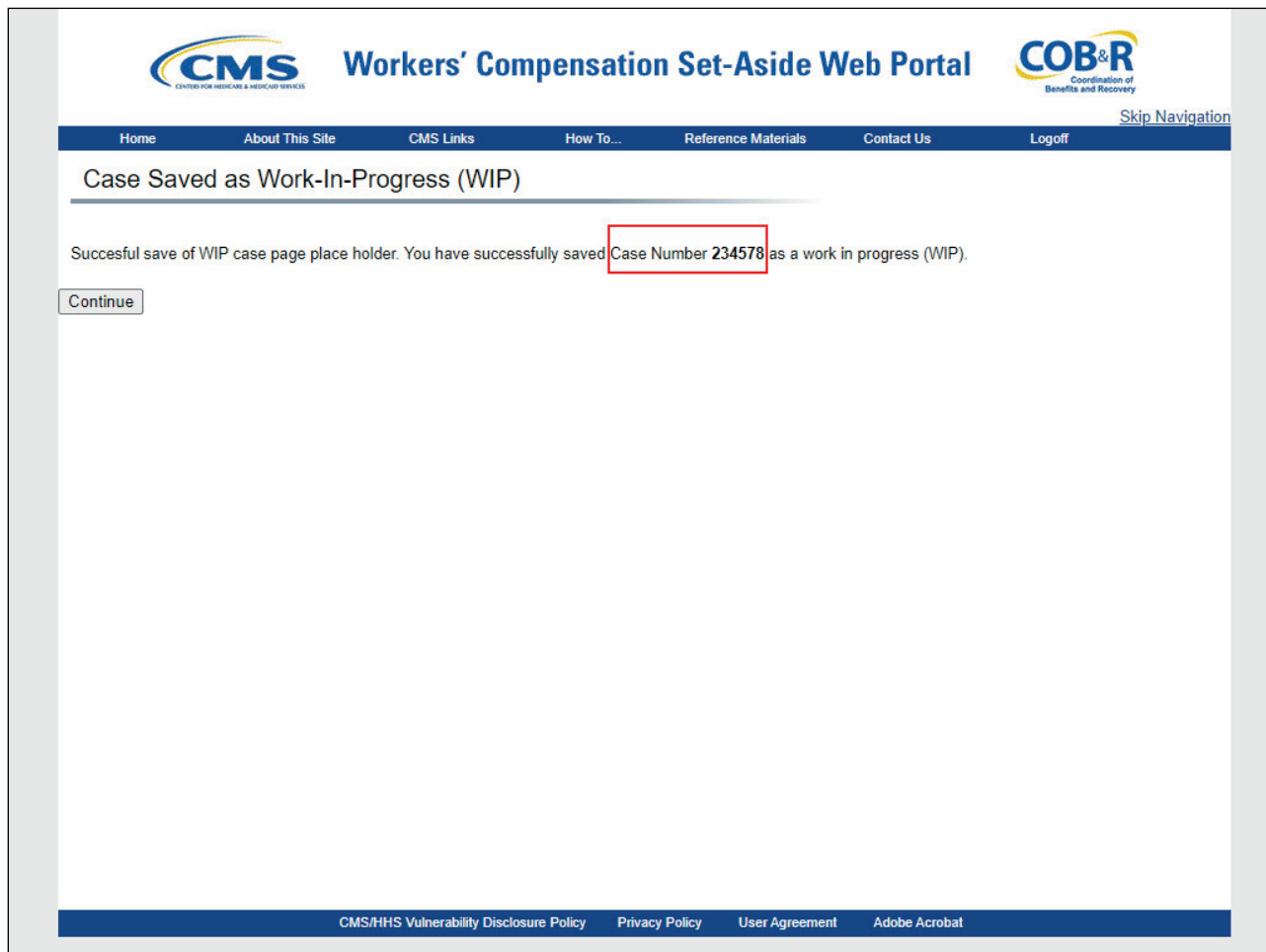
Slide notes

This option allows you to provide partial information for a case if you do not have all of the information readily available to submit the case.

This option also allows you to upload a subset of the documentation for the case.

The only data required to save a case as a Work-In-Progress is:

- the Beneficiary/Claimant's Medicare ID and/or SSN,
- Last Name,
- First Name,
- Date of Birth,
- Gender,
- Proposed Settlement Amount, and
- Initial Date of Injury.

Slide 12 of 66 - WIP Case Saved**Slide notes**

When you utilize the Save Work-In-Progress option, you will receive a Case Control Number so you can return to the case at a future point(s) in time to complete the case creation.

A Work-In-Progress case must be submitted within 60 business days from the initial case creation date. Otherwise, the Work-In-Progress case will be automatically marked as deleted.

When a saved Work-In-Progress case is finally submitted, it will retain the same case control number.

Slide 13 of 66 - Editing a Work In Progress Case

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

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](#)

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

Slide notes

To view or edit a Work-In-Progress case that was previously saved, you will utilize the Case Lookup feature on the WCMSA Home page. This option will allow you to search for a saved Work-In-Progress case.

Slide 14 of 66 - Making Corrections

The screenshot displays a web application interface for case submission. At the top, a navigation bar includes links for Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Logoff, along with a Skip Navigation link. Below this is a 'Case Information' section with a tabbed interface. The 'Beneficiary/Claimant *' tab is selected and highlighted with a red box. Other tabs include WCMSA Administrator *, Diagnosis Codes *, Medical *, Prescriptions *, WC Carrier *, Employer*, and Attorney. Below the tabs, the 'Beneficiary/Claimant Information' section contains a form with various fields. A note states: 'A superscript (1) indicates a field required for submission.' The form fields are: Last Name: Doe, First Name: John, MI: A, Beneficiary/Claimant SSN: ***-**-1234, Beneficiary/Claimant Date of Birth: 06/15/1966 (MM/DD/CCYY), Beneficiary/Claimant Gender: Male, Address Line 1: 123 MAIN STREET, Address Line 2: (empty), City: Windsor Mill, State of Residence: Maryland, Zip Code: 21014 - 1234, Phone: 111-222-3333, State where injury occurred: - Select -, and Submitter Type: -Select-. A 'QUICK HELP' button with a link 'Help About This Page' is located on the right. At the bottom of the form, there are buttons for 'Next', 'Save Work-In-Progress', 'Case Summary', and 'Cancel Case Creation'. The footer contains links for CMS/IHS Vulnerability Disclosure Policy, Privacy Policy, User Agreement, and Adobe Acrobat.

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

Case Information

Beneficiary/Claimant * WCMSA Administrator * Diagnosis Codes * Medical * Prescriptions * WC Carrier * Employer* Attorney

Notes Documents * Summary

Beneficiary/Claimant Information

A superscript ⁽¹⁾ indicates a field required for submission.

Last Name: Doe
First Name: John
MI: A
Beneficiary/Claimant SSN: ***-**-1234
Beneficiary/Claimant Date of Birth: 06/15/1966 (MM/DD/CCYY)
Beneficiary/Claimant Gender: Male
Address Line 1: 123 MAIN STREET
Address Line 2:
City: Windsor Mill
State of Residence: Maryland
Zip Code: 21014 - 1234
Phone: 111-222-3333
State where injury occurred: - Select -
Submitter Type: -Select-

QUICK HELP
[Help About This Page](#)

Next Save Work-In-Progress Case Summary Cancel Case Creation

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

Slide notes

If the name, address, or phone number information is incorrect, click the Cancel Case Creation button. Make the necessary corrections via the Update Personal Information link on the Home page and then begin the case creation process again.

Slide 15 of 66 - Entered Data

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

Case Information

Beneficiary/Claimant * WCMSA Administrator * Diagnosis Codes * Medical * Prescriptions * WC Carrier * Employer * Attorney

Notes Documents * Summary

Beneficiary/Claimant Information

A superscript ⁽¹⁾ indicates a field required for submission.

Last Name: Doe
First Name: John
MI: A
Beneficiary/Claimant SSN: ***-**-1234
Beneficiary/Claimant Date of Birth: 06/15/1966 (MM/DD/CCYY)
Beneficiary/Claimant Gender: Male
Address Line 1: 123 MAIN STREET
Address Line 2:
City: Windsor Mill
State of Residence: Maryland
Zip Code: 21014 - 1234
Phone: 111-222-3333
State where injury occurred: - Select -
Submitter Type: -Select-

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

Next Save Work-In-Progress Case Summary Cancel Case Creation

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

Slide notes

The WCMSAP will ensure that the entered data conforms to the business rules of the application.

If errors are found, the system will display applicable error messages indicating what error condition(s) was/were found.

When errors are discovered, the cursor shall be placed on the first field that generates an error condition.

This will either be a required field that is missing data or a field that contains a data error. You must correct the error before the system will allow you to proceed to the next page.

Once the data has been corrected, the system will revalidate all data entered. Several types of data validation will be performed. For example, name fields: must be alphabetic, (accent mark and dash are allowed); when a zip code is required, the first 5 digits are mandatory; and the maximum e-mail address field length is 80 characters.

Slide 16 of 66 - Diagnosis Codes Tab

The screenshot displays the 'Workers' Compensation Set-Aside Web Portal' interface. At the top, there are logos for CMS (Centers for Medicare & Medicaid Services) and COB&R (Coordination of Benefits and Recovery). A navigation bar includes links for Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Logoff. The 'Skip Navigation' link is also present.

The main content area is titled 'Case Information' and features a series of tabs: Beneficiary/Claimant *, WCMSA Administrator *, **Diagnosis Codes *** (highlighted with a red box), Medical *, Prescriptions *, WC Carrier *, Employer *, Attorney, Notes, Documents *, and Summary.

Below the tabs, the 'Diagnosis Codes' section is visible. It includes a 'QUICK HELP' button with a link to 'Help About This Page'. A text block explains that users can search for a diagnosis code by entering the code or any text in the text field to find all diagnoses whose description includes that text. It also provides a link to the 'Diagnosis Code Lookup' screen.

A red box highlights the 'Diagnosis Code Search' link, which is accompanied by a magnifying glass icon. Below this, instructions state: 'Type the diagnosis code in the text box provided and click on the 'Add Diagnosis Code' button to add the diagnosis code to the list. At least one diagnosis code must be provided for the case. The primary Diagnosis Code should be added first. You may add up to 5 diagnosis codes to the case. Click the 'Clear' button to clear the value in the text box. To delete a diagnosis code from the listing, click the delete icon 'X' to the left of the diagnosis code.'

A superscript (1) indicates a field required for submission. The 'Diagnosis Code' field contains '5933', and the 'DX Ind:' field has radio buttons for 'ICD-9' and 'ICD-10'. The 'Add Diagnosis Code' and 'Clear' buttons are also visible.

Below the input fields is a table listing the added diagnosis codes:

Delete	Diagnosis Code	Description
X	5933	Foreign Body in Larynx

At the bottom of the page, there are buttons for 'Previous', 'Next', 'Save Work-In-Progress', 'Case Summary', and 'Cancel Case Creation'. The footer contains links for CMS/HHS Vulnerability Disclosure Policy, Privacy Policy, User Agreement, and Adobe Acrobat.

Slide notes

Once we have already selected our Administrator Type and clicked Next, the Diagnosis Codes page will appear. If you know the diagnosis code, you can enter a diagnosis code into the Diagnosis Code field, select the appropriate bullet for ICD-9 or ICD-10 and click "Add Diagnosis Code". You can also search for codes by clicking the Diagnosis Code Search link.

Enter at least three characters in either field. You cannot search both fields simultaneously.

Once your search criteria are entered, select the applicable diagnosis indicator, and click the Search icon.

Slide 17 of 66 - Diagnosis Codes Search Page

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

Case Information

Diagnosis Codes

You may search for a diagnosis code by entering a numeric value for the code or by entering any text in the text field to find all the diagnoses whose description includes that text.

QUICK HELP
[Help About This Page](#)

Diagnosis Code: Search

Diagnosis Keywords: Search

Click on the radio button to select the code from the following list and click the 'Select Diagnosis Code' add it to the Case.

Code	Description
<input type="radio"/> 933	Foreign Body in Larynx
<input type="radio"/> 5933	Generalized Infection
<input type="radio"/> 7933	Abdominal Swelling

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

Slide notes

The Diagnosis Codes search page will appear. Search for codes by entering either a partial diagnosis code in the Diagnosis Code text box, or by entering descriptive keywords in the Diagnosis Keywords text box. A list of diagnosis codes that match the text or numbers entered will appear near the bottom of the page.

Select the desired diagnosis code by clicking the radio button next to it and then click Select Diagnosis Code.

Slide 18 of 66 - New Codes Display

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](#)

Case Information

Beneficiary/Claimant * WCMSA Administrator * **Diagnosis Codes *** WC Carrier * Employer * Attorney Notes Documents *
 Summary

Diagnosis Codes

QUICK HELP
[Help About This Page](#)

You may search for a diagnosis code by entering the code or by entering any text in the text field to find all the diagnoses whose description includes that text.

If you would like to perform a Diagnosis Code Lookup by the code or the description, please Click on the Search link to go to the Diagnosis Code Lookup screen.

[Diagnosis Code](#) Search

Type the diagnosis code in the text box provided and click on the 'Add Diagnosis Code' button to add the diagnosis code to the list. At least one diagnosis code must be provided for the case. The primary Diagnosis Code should be added first. You may add up to 5 diagnosis codes to the case. Click the 'Clear' button to clear the value in the text box. To delete a diagnosis code from the listing, click the delete icon 'X' to the left of the diagnosis code.

Diagnosis Code:

Delete	Diagnosis Code	Description
	933	Foreign Body in Larynx
	5933	Generalized Infection

Slide notes

The Diagnosis Codes page reappears, with the new code added to the list at the bottom of the page.

To remove a diagnosis code from a case, click the Delete icon next to the code.

You may delete a diagnosis code at any time PRIOR to case submission.

When you have completed filling out the Diagnosis Codes page, click Next to continue.

Slide 19 of 66 - Medical Care Tab

The screenshot shows the 'Medical Care' tab selected in a case submission interface. The top navigation bar includes links for Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Logoff. Below this, a 'Case Information' section contains tabs for Beneficiary/Claimant *, WCMSA Administrator *, Diagnosis Codes *, Medical *, Prescriptions *, WC Carrier *, Employer *, and Attorney. The 'Medical *' tab is active and highlighted with a red box. Below the tabs, the 'Medical Care' section contains a paragraph explaining the purpose of the tab: 'Please indicate whether the future medical expenses included in the proposed Workers' Compensation Medicare Set-Aside Arrangement (WCMSA) for this settlement include any costs associated with a major medical center (i.e., costs related to a surgery, hospital stay, long-term in-patient care, etc.).' A red box highlights the question: 'Does the proposed WCMSA for this settlement include any costs associated with a major medical center?' with radio buttons for 'Yes' and 'No'. Below this is the 'Zip Code Entry' section, which includes a paragraph explaining the purpose of the zip code entry and a red box highlighting the 'Zip Code:' input field, 'Search' button, and 'Clear' button. A 'Note' section follows, explaining that the major medical center listed below was identified using the same source used by the Major Medical Center Lookup tool. At the bottom, there are buttons for 'Previous', 'Next', 'Save Work-In-Progress', 'Case Summary', and 'Cancel Case Creation'. The footer contains links for CMS/HHS Vulnerability Disclosure Policy, Privacy Policy, User Agreement, and Adobe Acrobat.

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

Case Information

Beneficiary/Claimant * WCMSA Administrator * Diagnosis Codes * **Medical *** Prescriptions * WC Carrier * Employer * Attorney

Notes Documents * Summary

Medical Care

Please indicate whether the future medical expenses included in the proposed Workers' Compensation Medicare Set-Aside Arrangement (WCMSA) for this settlement include any costs associated with a major medical center (i.e., costs related to a surgery, hospital stay, long-term in-patient care, etc.).

Does the proposed WCMSA for this settlement include any costs associated with a major medical center? ☐ Yes ☐ No

Zip Code Entry

Please enter the zip code for the major medical center that was used in the calculation of the proposed WCMSA and select 'Add Zip Code'. Selecting 'Clear' will remove the entered search criteria and any results from the page. A Zip Code must be provided for any settlement where a major medical center was used to calculate future treatment costs in the proposed WCMSA.

Zip Code: Search Clear

Note: The major medical center listed below was identified using the same source used by the Major Medical Center Lookup tool that is available to submitters on the Home page. It is possible the major medical center that CMS associates with the entered zip code may be different than the one used in the proposed WCMSA for the same zip code. During its review process to determine the sufficiency of the proposed WCMSA, if CMS agrees that a major medical center needs to be part of the expected future treatment, then one will be selected using the Zip Code guidelines in the WCMSA Reference Guide on the CMS.gov website at <https://go.cms.gov/wcmsa> and the Major Medical Center Lookup tool.

Previous Next Save Work-In-Progress Case Summary Cancel Case Creation

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

Slide notes

The Medical Care page will appear. Here you will indicate whether the future medical expenses included in the Workers' Compensation Medicare Set-Aside Arrangement (WCMSA) for the settlement include any costs associated with a major medical center. You also have access to a Major Medical Center Lookup Tool. This tool allows submitters to look up major medical centers by their ZIP codes.

Note: Submitters now have access to the Major Medical Center Lookup Tool from the Account List page.

Slide 20 of 66 - Prescription Drugs Tab

Beneficiary/Claimant *
WCMSA Administrator *
Diagnosis Codes *
Medical *
Prescriptions *
WC Carrier *
Employer *
Attorney

NotesDocuments *Summary

Prescription Drugs

Please indicate whether the claimant is taking or is expected to take prescription drugs as a result of the Workers' Compensation injury. Enter all prescription drug information if prescription drugs are involved in the case. **Note:** The information that you enter on this screen is not final. The WCRC will review and make changes as appropriate.

Is claimant currently taking or expected to take prescription drugs as a result of the injury? ☒ Yes ☐ No

Prescription Drug Entry

First use the Redbook Drug Lookup Tool to find the correct drug. Then enter details about the prescription, calculate the total, and click [Add].

Drug Lookup
Calculate Total
Add
Clear

Drug Name	Dosage	NDC	Frequency Per Day	Frequency Per Week	Frequency Per Month	# Years	Reason for Edit of # Years	PPU	Total
DIPHENHYDRAMINE HYDROCHLORIDE	50 MG	17714-0021-10	3			15		0.01	

Summary of Prescription Drugs

Delete	Drug Name	Dosage	NDC	Frequency Per Day	Frequency Per Week	Frequency Per Month	# Years	Reason for Edit of # Years	PPU	Total	Redbook Version	Rx Info.
X	ACETAMINOPHEN		02991-2690-04		1.0		15		0.21	163.80	2014.04	i
X	OXAZEPAM	10 MG	00172-4804-80	3.0			15		0.88	14125.50	2014.04	i
Grand Total										14289.30		

Note: Drug pricing information may change depending on when you submit the case

Previous
Next

Save Work-In-Progress
Case Summary
Cancel Case Creation

Slide notes

The Prescription Drugs page allows you to enter drug information for a claimant who is currently taking, or is expected to take, prescription drugs as a part of their Workers' Compensation injury.

A drug disposition is required for this page. You must click either Yes or No to the question: "Is claimant currently taking or expected to take prescription drugs as a result of the injury?"

An error asterisk (*) will appear on the Case Summary page if no radio button is selected, or if Yes is selected and no drug information is provided.

Note: The information that you enter on this screen is not final. The Workers' Compensation Recovery Center (WCRC) will review and make changes as appropriate.

Slide 21 of 66 - Drug Lookup Button

Beneficiary/Claimant *WCMSA Administrator *Diagnosis Codes *Medical *Prescriptions *WC Carrier *Employer *Attorney

NotesDocuments *Summary

Prescription Drugs

QUICK HELP
[Help About This Page](#)

Please indicate whether the claimant is taking or is expected to take prescription drugs as a result of the Workers' Compensation injury. Enter all prescription drug information if prescription drugs are involved in the case. **Note:** The information that you enter on this screen is not final. The WCRC will review and make changes as appropriate.

Is claimant currently taking or expected to take prescription drugs as a result of the injury? ☒ Yes ☐ No

Prescription Drug Entry

First use the Redbook Drug Lookup Tool to find the correct drug. Then enter details about the prescription, calculate the total, and click [Add].

Drug Lookup

Calculate Total

Add

Clear

Drug Name	Dosage	NDC	Frequency Per Day	Frequency Per Week	Frequency Per Month	# Years	Reason for Edit of # Years	PPU	Total
DIPHENHYDRAMINE HYDROCHLORIDE	50 MG	17714-0021-10	3			15		0.01	

Summary of Prescription Drugs

Delete	Drug Name	Dosage	NDC	Frequency Per Day	Frequency Per Week	Frequency Per Month	# Years	Reason for Edit of # Years	PPU	Total	Redbook Version	Rx Info.
X	ACETAMINOPHEN		02991-2090-04		1.0		15		0.21	163.80	2014.04	i
X	OXAZEPAM	10 MG	00172-4804-80	3.0			15		0.88	14125.50	2014.04	i
Grand Total										14289.30		

Note: Drug pricing information may change depending on when you submit the case

Previous

Next

Save Work-In-Progress

Case Summary

Cancel Case Creation

Slide notes

To find prescription drugs to add to a claimant's case, start by clicking the Drug Lookup button to begin a search for the drugs listed within the Redbook database.

Slide 22 of 66 - Rx Search

The screenshot shows the 'Workers' Compensation Set-Aside Web Portal' with the CMS logo and COB&R logo. The navigation bar includes links for Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Logoff. The 'Rx Search' section contains a 'Form:' dropdown menu, 'Return', 'Clear', and 'Search' buttons, and a 'Print this page' link. The 'Drug Name:' field is split into two input boxes. The 'Dosage:' field is also split into two input boxes, with a 'Brand Only' checkbox. The 'Route of Admin:' dropdown menu is set to '- Select All -'. A 'QUICK HELP' box with a 'Help About This Page' link is on the right. The footer contains links for CMS/HHS Vulnerability Disclosure Policy, Privacy Policy, User Agreement, and Adobe Acrobat.

Slide notes

When the Rx Search page opens, enter your search criteria in one or more of the available fields and then initiate a search.



Entering full or partial phrases or numbers in the Drug Name and Dosage fields, respectively, retrieves all results that include that phrase or number (i.e., Entering "Aspirin" will retrieve all variants of the drug name containing the term "aspirin").

The Rx Search results grid displays all matching criteria up to a maximum of 500 drug entries. The results include the most recent release of the Redbook drug pricing for the lowest priced drug meeting the criteria.

Only drugs identified within the Redbook as active and include a manufacturer are considered for lowest price selection.

Note: The results will not include any invalid or discontinued National Drug Codes (NDCs) or repackaged NDCs.


Slide 23 of 66 - Rx Search Results


Workers' Compensation Set-Aside Web Portal


[Skip Navigation](#)

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

Rx Search

 [Print this page](#)

Form:
- Select -










Return Clear Search

QUICK HELP
[Help About This Page](#)

Drug Name:
/

Dosage:
/
☐ Brand Only

Route of Admin:
- Select All -

Drug Name	NDC	Dosage	Form	PPU	Rpkgr	Active	Actions	Actions
ASPIRIN/CARISOPRODOL	64980-0175-01	325 MG-200 MG	TABLET	\$2.00		Y		Select
ASPIRIN/CARISOPRODOL/CODEINE PHOSPH	00185-0749-01	325 MG-200 MG-16 MG	TABLET	\$2.77		Y		Select
ASPIRIN/OXYCODONE HYDROCHLORIDE	00591-3551-01	325 MG-4.8355 MG	TABLET	\$1.02		Y		Select
ASPIRIN/BUTALBITAL/CAFFEINE	00591-3219-01	325 MG-50 MG-40 MG	CAPSULE	\$1.31		Y		Select
ASPIRIN/BUTALBITAL/CAFFEINE/CODEINE	00591-3546-05	325 MG-50 MG-40 MG-30 MG	CAPSULE	\$2.63		Y		Select
ASPIRIN/CAFFEINE/DIHYDROCODEINE BIT	57664-0419-88	356.4 MG-30 MG-16 MG	CAPSULE	\$1.84		Y		Select
ASPIRIN/CAFFEINE/ORPHENADRINE CITRA	00378-3354-01	385 MG-30 MG-25 MG	TABLET	\$0.79		Y		Select
ASPIRIN/HYDROCODONE BITARTRATE	12758-0057-10	500 MG-5 MG	TABLET	\$0.31		Y		Select
ASPIRIN	17317-0034-08		POWDER	\$0.01		Y		Select

Note: Results will not include any invalid/discontinued NDCs or repackaging NDCs.

Slide notes


Click the Search button to initiate the search or click Clear to remove the search criteria.

The initial search results are sorted by drug name first in ascending order, then by dosage in ascending order. All search results may be sorted using any column.


From the RX Search results grid, click the Select hyperlink for a drug to add it to the Drug Entry grid on the Prescription Drugs page.

Click Return to go back to the main Prescription Drugs page. Note: When you click Return, neither the search criteria nor the results are saved.

Slide 24 of 66 - Rx Detail



Workers' Compensation Set-Aside Web Portal



[Skip Navigation](#)

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[Reference Materials](#)
[Contact Us](#)
[Logoff](#)

Rx Detail

Product	ACETAMINOPHEN
Manufacturer	LETCO
Form	CRY
Strength	
Route of Admin	NA
Orange Book Code	
Description	(1X2500GM,60MESH,USP)
Generic Name	ACETAMINOPHEN
Size	000000001
DEA Class	R

NDC	62991269004
HRI	
UPC	
MFG	
Other	
Unit Dose	
Single Source	1
Repackager	
Generic	
Active	Y
AWP Effective Date	2013-01-01

 [Print this page](#)

QUICK HELP
[Help About This Page](#)

Pricing History

Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2014			0.21000									
2013										0.21000	0.21000	0.21000
2012		0.10260	0.10260									

[Return](#)

Slide notes

When you complete a search, each returned row includes an Info button. The Info button opens the Rx Detail page, which allows you to view the Redbook details for a particular drug.

To view current pricing and details, click the Info button for a drug on the Rx Search results grid. The Rx Detail page appears. The current details for that drug appear at the top of the page.

To view historical pricing and details go to the Pricing History section on the Rx Detail page. This page shows the most recent 24 historical prices in a month/year format.

For the desired time period, click the price hyperlink. The Rx Historical Detail page displays showing the Rx History Detail - [Year] - [Month].

Slide 25 of 66 - Prescription Drug Entry

Beneficiary/Claimant *
WCMSA Administrator *
Diagnosis Codes *
Medical *
Prescriptions *
WC Carrier *
Employer *
Attorney
Notes
Documents *
Summary

Prescription Drugs

Please indicate whether the claimant is taking or is expected to take prescription drugs as a result of the Workers' Compensation injury. Enter all prescription drug information if prescription drugs are involved in the case. **Note:** The information that you enter on this screen is not final. The WCRC will review and make changes as appropriate.

Is claimant currently taking or expected to take prescription drugs as a result of the injury? ☒ Yes ☐ No

Prescription Drug Entry

First use the Redbook Drug Lookup Tool to find the correct drug. Then enter details about the prescription, calculate the total, and click [Add].

Drug Lookup
Calculate Total
Add
Clear

Drug Name	Dosage	NDC	Frequency Per Day	Frequency Per Week	Frequency Per Month	# Years	Reason for Edit of # Years	PPU	Total
DIPHENHYDRAMINE HYDROCHLORIDE	50 MG	17714-0021-10	3			15		0.01	

Summary of Prescription Drugs

Delete	Drug Name	Dosage	NDC	Frequency Per Day	Frequency Per Week	Frequency Per Month	# Years	Reason for Edit of # Years	PPU	Total	Redbook Version	Rx Info.
X	ACETAMINOPHEN		02991-2090-04		1.0		15		0.21	163.80	2014.04	i
X	OXAZEPAM	10 MG	00172-4804-80	3.0			15		0.88	14125.50	2014.04	i
Grand Total										14289.30		

Note: Drug pricing information may change depending on when you submit the case

Previous
Next
Save Work-In-Progress
Case Summary
Cancel Case Creation

Slide notes

The Prescription Drug Entry page includes two grids: a Drug Entry grid, which shows a single selected drug from a search for which you can calculate pricing, and the Summary of Prescription Drugs grid, which shows all drugs added for the claimant and displays a total cost for all the drugs.

Slide 26 of 66 - Prescription Search Page

Beneficiary/Claimant *WCMSA Administrator *Diagnosis Codes *Medical *Prescriptions *WC Carrier *Employer *Attorney

NotesDocuments *Summary

Prescription Drugs

QUICK HELP
[Help About This Page](#)

Please indicate whether the claimant is taking or is expected to take prescription drugs as a result of the Workers' Compensation injury. Enter all prescription drug information if prescription drugs are involved in the case. **Note:** The information that you enter on this screen is not final. The WCRC will review and make changes as appropriate.

Is claimant currently taking or expected to take prescription drugs as a result of the injury? ☒ Yes ☐ No

Prescription Drug Entry

First use the Redbook Drug Lookup Tool to find the correct drug. Then enter details about the prescription, calculate the total, and click [Add].

Drug LookupCalculate TotalAddClear

Drug Name	Dosage	NDC	Frequency Per Day	Frequency Per Week	Frequency Per Month	# Years	Reason for Edit of # Years	PPU	Total
DIPHENHYDRAMINE HYDROCHLORIDE	50 MG	17714-0021-10	3			15		0.01	

Summary of Prescription Drugs

Delete	Drug Name	Dosage	NDC	Frequency Per Day	Frequency Per Week	Frequency Per Month	# Years	Reason for Edit of # Years	PPU	Total	Redbook Version	Rx Info.
X	ACETAMINOPHEN		02991-2090-04		1.0		15		0.21	163.80	2014.04	i
X	OXAZEPAM	10 MG	00172-4804-80	3.0			15		0.88	14125.50	2014.04	i
Grand Total										14289.30		

Note: Drug pricing information may change depending on when you submit the case

PreviousNext

Save Work-In-ProgressCase SummaryCancel Case Creation

Slide notes

To select and calculate the cost of a single drug, select a drug by clicking the Select button from the results listing on the Rx Search page.

Slide 27 of 66 - Drug Entry Grid

Beneficiary/Claimant *
WCMSA Administrator *
Diagnosis Codes *
Medical *
Prescriptions *
WC Carrier *
Employer *
Attorney
Notes
Documents *
Summary

Prescription Drugs

Please indicate whether the claimant is taking or is expected to take prescription drugs as a result of the Workers' Compensation injury. Enter all prescription drug information if prescription drugs are involved in the case. **Note:** The information that you enter on this screen is not final. The WCRC will review and make changes as appropriate.

Is claimant currently taking or expected to take prescription drugs as a result of the injury? ☒ Yes ☐ No

Prescription Drug Entry

First use the Redbook Drug Lookup Tool to find the correct drug. Then enter details about the prescription, calculate the total, and click [Add].

Drug Lookup
Calculate Total
Add
Clear

Drug Name	Dosage	NDC	Frequency Per Day	Frequency Per Week	Frequency Per Month	# Years	Reason for Edit of # Years	PPU	Total
DIPHENHYDRAMINE HYDROCHLORIDE	50 MG	17714-0021-10	3			15		0.01	

Summary of Prescription Drugs

Delete	Drug Name	Dosage	NDC	Frequency Per Day	Frequency Per Week	Frequency Per Month	# Years	Reason for Edit of # Years	PPU	Total	Redbook Version	Rx Info.
X	ACETAMINOPHEN		02991-2090-04			1.0	15		0.21	163.80	2014.04	i
X	OXAZEPAM	10 MG	00172-4804-80	3.0			15		0.88	14125.50	2014.04	i
Grand Total										14289.30		

Note: Drug pricing information may change depending on when you submit the case

Previous
Next
Save Work-In-Progress
Case Summary
Cancel Case Creation

Slide notes

The drug is added to the Drug Entry grid on the Prescription Drugs page.

Enter all details in the Drug Entry grid. Click the Calculate Total button.

To add a drug to the Summary of Prescription Drugs grid, complete all required fields in the Drug Entry grid and then click the Add button.

After adding the drug to the Summary of Prescription Drugs grid, the drug is automatically removed from the Drug Entry grid. To remove all data from the Drug Entry grid, click the Clear button.

Note: The Summary of Prescription Drugs grid can display a maximum of 200 drugs. Drug pricing information may change depending on when you submit the case.

Click Next to move to the next tab or click Save Work-in-Progress to save your work and return to the Case Lookup page.

All drug information is displayed in the Prescription Drugs section of the Case Information page. While the case is still in WIP status, the drug information may be edited.

Once a case is submitted, no changes may be made to prescription drug information. The drug information is then view only.

Slide 28 of 66 - Red Book Information

Drug Entry and Summary of Prescription Drug Fields

Should the current Red Book information or pricing change after saving the drugs, but before submitting the case, the application will automatically update the drug prices and recalculate the totals in the Summary of Prescription Drugs grid at the time of submission based on the newer Redbook version.



Slide notes

Should the current Red Book information or pricing change after saving the drugs, but before submitting the case, the application will automatically update the drug prices and recalculate the totals in the Summary of Prescription Drugs grid at the time of submission based on the newer Redbook version.

If the application determines that there is invalid or discontinued NDCs for the saved drugs based on a newer Redbook version, you will be required to return to the Summary Information page and re-enter those drugs before submitting a case.

The word “Invalid” will show to the right of the invalid prescription drug on the Summary of Prescription Drugs grid.

If prescription drugs are included on a case and the current Redbook version number does not match the Redbook version number used for the prescription drugs on a case, the application will change the Redbook version number and show a warning or alert on the Case Summary page indicating that the Redbook version number has been updated on one or more prescription drug entries.

Slide 29 of 66 - WC Carrier Tab

The screenshot displays the 'Workers' Compensation Set-Aside Web Portal' interface. At the top, there are logos for CMS (Center for Medicare & Medicaid Services) and COB&R (Coordination of Benefits and Recovery), along with a 'Skip Navigation' link. A navigation bar includes links for Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Logoff. Below this, the 'Case Information' section is active, showing a series of tabs: Beneficiary/Claimant *, WCMSA Administrator *, Diagnosis Codes *, Medical *, Prescriptions *, WC Carrier * (highlighted with a red box), Employer *, Attorney, Notes, and Documents *. A 'Summary' button is also present. The main content area is titled 'Workers' Compensation (WC) Carrier'. It includes a note: 'A superscript (1) indicates a field required for case submission.' To the right is a 'QUICK HELP' button with a link to 'Help About This Page'. The form fields include: Insurer Name: 1, Address Line 1: 1, Address Line 2, City: 1, State: 1 (a dropdown menu showing '- Select -'), Zip Code: 1, Phone: 1, Fax, E-Mail, Re-enter E-Mail, Policy Number: 1 OR Claim Number: 1, Tax ID Number (TIN), Rx PCN, and RX Bin. At the bottom, there are buttons for 'Previous', 'Next', 'Save Work-In-Progress', 'Case Summary', and 'Cancel Case Creation'. The footer contains links for CMS/HHS Vulnerability Disclosure Policy, Privacy Policy, User Agreement, and Adobe Acrobat.

Slide notes

The Workers' Compensation (WC) Carrier page appears. You are required to enter one WC Carrier (insurer) upon Case submission. Only one WC Carrier may be entered on this page.

Any additional Workers' Compensation Carriers must be entered on the Case Notes page.

Fields marked with a superscript 1 (1) are required.

When this page is complete, click Next to continue.

Slide 30 of 66 - Employer Tab

The screenshot displays the 'Workers' Compensation Set-Aside Web Portal' interface. At the top, there are logos for CMS (Centers for Medicare & Medicaid Services) and COB&R (Coordination of Benefits and Recovery). 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. Below the navigation bar, the 'Case Information' section is visible, with tabs for Beneficiary/Claimant *, WCMSA Administrator *, Diagnosis Codes *, Medical *, Prescriptions *, WC Carrier *, Employer *, Attorney, Documents *, and Summary. The 'Employer *' tab is selected and highlighted with a red box. The 'Employer Information' section contains a note: 'A superscript (1) indicates a field required for case submission.' The form fields include: Employer Name: 1, Address Line 1: 1, Address Line 2, City: 1, State: 1 (a dropdown menu showing '- Select -'), Zip Code: 1, Phone: 1, and Tax ID Number (TIN). A 'QUICK HELP' button with the text 'Help About This Page' is located on the right. At the bottom of the form, there are buttons for 'Previous', 'Next', 'Save Work-In-Progress', 'Case Summary', and 'Cancel Case Creation'. The footer contains links for CMS/HHS Vulnerability Disclosure Policy, Privacy Policy, User Agreement, and Adobe Acrobat.

Slide notes

The Employer Information page appears. Upon case submission, data must be provided for the beneficiary or claimant's employer. Fields marked with a superscript 1 (1) are required.

Please note: the system will not allow any of the fields to be populated with the following values: Not applicable, N/A, NA, Unknown, Not Assigned, Not Represented, or None.

When this page is complete, click Next to continue.

Slide 31 of 66 - Attorney Tab

The screenshot displays the 'Workers' Compensation Set-Aside Web Portal' interface. At the top, there are logos for CMS (Centers for Medicare & Medicaid Services) and COB&R (Coordination of Benefits and Recovery). A navigation bar includes links: Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Logoff. A 'Skip Navigation' link is also present. Below the navigation bar, the 'Case Information' section is active. A row of tabs includes: Beneficiary/Claimant *, WCMSA Administrator *, Diagnosis Codes *, Medical *, Prescriptions *, WC Carrier *, Employer *, and Attorney (which is highlighted with a red box). Below these tabs are 'Notes', 'Documents *', and 'Summary' buttons. The main content area is titled 'Beneficiary/Claimant Attorney'. It contains a instruction: 'Please leave fields blank if not represented by an attorney. If partial information is provided on this page, then Last Name, First Name, Address Line 1, City, State, Zip and Phone are all required.' To the right of this text is a 'QUICK HELP' button with a link 'Help About This Page'. The form fields include: Name (text input), Address Line 1 (text input), Address Line 2 (text input), City (text input), State (dropdown menu showing '- Select -'), Zip Code (text input), Phone (text input with hyphens), Fax (text input with hyphens), Attorney E-mail Address (text input), Re-enter Attorney E-mail Address (text input), and Address (text input). At the bottom of the form are buttons: Previous, Next, Save Work-In-Progress, Case Summary, and Cancel Case Creation. The footer contains links: CMS/HHS Vulnerability Disclosure Policy, Privacy Policy, User Agreement, and Adobe Acrobat.

Slide notes

The Beneficiary/Claimant Attorney page will appear. If the beneficiary or claimant is represented by an attorney, the following fields are required:

- Last Name,
- First Name,
- Address Line 1,
- City,
- State,
- Zip Code, and
- Phone Number.

If the beneficiary or claimant is not represented by an attorney, these fields must be left blank.

Please note: the system will not allow any of the fields to be populated with the following values: Not applicable, N/A, NA, Unknown, Not Assigned, Not Represented, or None.

When this page is complete, click Next to continue.

Slide 32 of 66 - Notes Tab

The screenshot shows the 'Workers' Compensation Set-Aside Web Portal' interface. At the top, there are logos for CMS (Centers for Medicare & Medicaid Services) and COB&R (Coordination of Benefits and Recovery). A navigation bar includes links: Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Logoff. A 'Skip Navigation' link is also present.

The main section is titled 'Case Information'. Below this, there are several tabs: Beneficiary/Claimant *, WCMSA Administrator *, Diagnosis Codes *, Medical *, Prescriptions *, WC Carrier *, Employer *, Attorney, Notes (highlighted with a red box), Documents *, and Summary.

The 'Case Notes' section contains instructions: 'To add a note, type your note in the textbox provided and click the 'Add Note' button. To delete a note, click the 'Delete' icon. Notes may only be added or delete prior to case submission. Each note is limited to 800 characters.' A 'QUICK HELP' button with the link 'Help About This Page' is also visible.

Below the instructions is a text input field and an 'Add Note' button. A table displays existing notes:

Delete	Date Added	User	Notes
	2/8/2010	John Smith	Attached additional medical forms.
	1/10/2010	John Smith	Collecting documentation, saving as work in progress case.

At the bottom of the page, there are navigation buttons: Previous, Next, Save Work-In-Progress, Case Summary, and Cancel Case Creation. A footer bar contains links to CMS/HHS Vulnerability Disclosure Policy, Privacy Policy, User Agreement, and Adobe Acrobat.

Slide notes

The Notes page will appear. Although data is not required on this page, you may add notes to keep a listing of changes or other miscellaneous information.

Notes can be added to a:

- new case, at any time prior to its submission;
- case saved as a Work-In-Progress, at any time prior to its submission;
- submitted case when a document is replaced; and
- submitted case when additional documents are added.

Slide 33 of 66 - Adding a Note

The screenshot displays the 'Workers' Compensation Set-Aside Web Portal'. At the top, there are logos for CMS (Centers for Medicare & Medicaid Services) and COB&R (Coordination of Benefits and Recovery). A navigation bar includes links: Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Logoff. A 'Skip Navigation' link is also present.

The main section is titled 'Case Information'. Below this, there are tabs for: Beneficiary/Claimant *, WCMSA Administrator *, Diagnosis Codes *, Medical *, Prescriptions *, WC Carrier *, Employer *, Attorney, Notes, Documents *, and Summary. The 'Notes' tab is currently selected.

The 'Case Notes' section contains a text area for adding a note and an 'Add Note' button. A 'QUICK HELP' box with a link 'Help About This Page' is also visible.

Below the text area is a table listing existing notes:

Delete	Date Added	User	Notes
X	2/8/2010	John Smith	Attached additional medical forms.
X	1/10/2010	John Smith	Collecting documentation, saving as work in progress case.

At the bottom of the page, there are navigation buttons: Previous, Next, Save Work-In-Progress, Case Summary, and Cancel Case Creation. A footer bar contains links to CMS/HHS Vulnerability Disclosure Policy, Privacy Policy, User Agreement, and Adobe Acrobat.

Slide notes

To add a note, enter text in the free form note field and click Add Note. The Notes field is limited to 800 characters in length.

Once a note is added, the system will immediately display the date the note was added, the name of the user that added the note, and the contents of the note on the Case Notes page.

You may also delete a note any time prior to a case's submission by clicking on the "X" in the Delete column. After a case has been submitted, notes may not be deleted.

Notes may be added or deleted for Work-In-Progress cases by any user with access to the case. Click Next to continue.

Slide 34 of 66 - Documents Tab

The screenshot shows a web portal interface for case submission. At the top is a navigation bar with links: Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, Logoff, and a Skip Navigation link. Below the navigation bar is a section titled "Case Information" with tabs for Beneficiary/Claimant *, WCMSA Administrator *, Diagnosis Codes *, Medical *, Prescriptions *, WC Carrier *, Employer *, Attorney, Notes, Documents *, and Summary. The "Documents" tab is selected, and the page title is "Case Documents".

On the right side, there is a "QUICK HELP" box with a link "Help About This Page".

The main content area contains the following text:

More than 12 months have passed since the date of the last Closeout Letter, a full re-submission is now required and must include all documents submitted on the original case and all documentation for the past two years (up to present date).

Below is a list of the documentation that is attached to this case. To add documentation to the case, click the Add Files link under the document type you would like to add. Documents must be in PDF file format and cannot exceed 40 MB (megabytes).

To delete documentation, locate the document and click the 'Delete' button that appears to the right of the file name. This will permanently remove the document from the Web Portal. You will not be able to delete any files that were uploaded to the WCMSA Web Portal when the case was submitted.

If a document must be replaced a 'Replace' link will appear to the right of the file name.

An asterisk (*) indicates a required file.

05 - Submitter Letter or Other Summary Documents *

Submitter Letter.pdf 2010-01-20 [Delete](#)

[Add Files](#)

10 - Consent Form *

Consent Form.pdf 2010-01-20 [Delete](#)

[Add Files](#)

15 - Rated Age Information or Life Expectancy

[Add Files](#)

Slide notes

The Case Documents page appears. This page is used to upload important documents pertaining to the case.

Documents with an (*) are required when submitting a case through the portal.

Note: The Case Documents page text has been updated to remove the 100-page limit for medical records.

Slide 35 of 66 - Uploading Documents

Uploading Documents

- The system will allow you to:
 - Upload additional files to a new case at any time prior to a case's submission via the Add Files feature
 - Delete any of the files uploaded prior to submitting the case
 - View a listing of any existing uploaded files, by file name and upload date, within the respective categories, prior to a case's submission

**Slide notes**

The system will allow you to:

- Upload additional files to a new case at any time prior to a case's submission via the Add Files feature,
- Delete any of the files uploaded prior to submitting the case, and
- View a listing of any existing uploaded files, by file name and upload date, within the respective categories, prior to a case's submission.

Note: Clarification has been added that file names are limited to 80 characters when uploading documentation.

Slide 36 of 66 - Uploading Documents

Uploading Documents

- The system will NOT allow you to:
 - Overwrite a single page or multiple (range) pages in a .PDF file(s) before (or after) case submission
 - View the contents of any attached documents

**Slide notes**

The system will not allow you to:

- Overwrite a single page or multiple (range) of pages in a .PDF file(s) before (or after) case submission or
- View the contents of any attached documents.

Slide 37 of 66 - PDF File Format

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

Case Information

Beneficiary/Claimant * WCMSA Administrator * Diagnosis Codes * Medical * Prescriptions * WC Carrier * Employer * Attorney

Notes Documents * **Summary**

Case Documents

QUICK HELP

[Help About This Page](#)

More than 12 months have passed since the date of the last Closeout Letter, a full re-submission is now required and must include all documents submitted on the original case and all documentation for the past two years (up to present date).

Below is a list of the documentation that is attached to this case. To add documentation to the case, click the Add Files link under the document type you would like to add. Documents must be in PDF file format and cannot exceed 40 MB (megabytes).

To delete documentation, locate the document and click the 'Delete' button that appears to the right of the file name. This will permanently remove the document from the Web Portal. You will not be able to delete any files that were uploaded to the WCMSA Web Portal when the case was submitted.

If a document must be replaced a 'Replace' link will appear to the right of the file name.

An asterisk (*) indicates a required file.

05 - Submitter Letter or Other Summary Documents *

Submitter Letter.pdf 2010-01-20 [Delete](#)

[Add Files](#)

10 - Consent Form *

Consent Form.pdf 2010-01-20 [Delete](#)

[Add Files](#)

15 - Rated Age Information or Life Expectancy

[Add Files](#)

Slide notes

Once all of your information has been entered and your required documents attached, you will continue to the Case Summary Tab to confirm your data. You will notice that a new “Case Administrator” Section has been added to show the information captured on the new WCMSA Administrator page/tab along with an edit button to make changes if needed.

You must upload documentation in a .PDF file format to a specific category.

The documentation categories are as follows:

- Submitter Letter or Other Summary Documents,
- Consent Form,
- Rated Age Information or Life Expectancy,
- Life Care Plan,
- Proposed/Final Settlement Agreement or Court Order,
- Set-Aside Administrator or Copy of Agreement,
- Medical Records (1st Report of Injury through Recent Treatment),
- Payment History,

- Future Treatment Plans,
- Supplemental/Additional Information, and
- WCMSA Attestation Submission Documentation.

A blank Consent to Release Form and an example form with instructions can be found in the WCMSA Reference Guide.

This Reference Guide is available for download at the following link: [CMS WCMSAP Website](#).

To add a document to a case, click the Add Files link under the document category you would like to add.

Slide 38 of 66 - Set-Aside Administrator or Copy of Agreement

The screenshot displays a web form for case submission. At the top, a document 'SettlementDoc.pdf' is listed with a date of '2010-01-20' and a 'Delete' link. Below this is an 'Add Files' button. A red rectangular box highlights a required section: '30 - Set-Aside Administrator or Copy of Agreement * (Required for new case submission when the identified case administrator is Professional Administrator)'. This section also has an 'Add Files' button. Further down, the '35 - Medical Records (1st Report of Injury through Recent Treatment) *' section lists three documents: 'MedicalReports_1.pdf' (2010-01-20, Replace, Requires Replacement), 'MedicalReports_2.pdf' (2010-01-20, Delete, Pending Submission), and 'MedicalReports_3.pdf' (2010-02-08, Delete, Pending Submission). This section has an 'Add Files' button. The '40 - Payment History *' section has an 'Add Files' button. The '45 - Future Treatment Plans' section has an 'Add Files' button. The '50 - Supplement/Additional Information' section has an 'Add Files' button. The '55 - WCMSA Attestation Submission Documentation' section lists 'Submitter Letter.pdf' (2010-01-20). At the bottom, there is an attestation checkbox: '☐ * I attest that the documentation attached is complete and accurate to the best of my knowledge.' Below the attestation are four buttons: 'Previous', 'Next', 'Save Work-In-Progress', and 'Submit Files'. To the right of 'Submit Files' are two more buttons: 'Case Summary' and 'Cancel Case Creation'.

SettlementDoc.pdf 2010-01-20 [Delete](#)

[Add Files](#)

30 - Set-Aside Administrator or Copy of Agreement * (Required for new case submission when the identified case administrator is Professional Administrator)

[Add Files](#)

35 - Medical Records (1st Report of Injury through Recent Treatment) *

MedicalReports_1.pdf 2010-01-20 [Replace](#) (Requires Replacement)

MedicalReports_2.pdf 2010-01-20 [Delete](#) (Pending Submission)

MedicalReports_3.pdf 2010-02-08 [Delete](#) (Pending Submission)

[Add Files](#)

40 - Payment History *

[Add Files](#)

45 - Future Treatment Plans

[Add Files](#)

50 - Supplement/Additional Information

[Add Files](#)

55 - WCMSA Attestation Submission Documentation

Submitter Letter.pdf 2010-01-20

☐ * I attest that the documentation attached is complete and accurate to the best of my knowledge.

[Previous](#) [Next](#) [Save Work-In-Progress](#) [Submit Files](#) [Case Summary](#) [Cancel Case Creation](#)

Slide notes

You will also see that the case documents section has been updated to include the Set-Aside Administrator or Copy of Agreement section. If the document was not added, a new indicator has been added to alert you that a document is required for doc type 30 for new case creation if the Administrator Type is Professional Administrator.

Slide 39 of 66 - Attach Documentation Page

The screenshot shows the 'Attach Documentation' 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. The main heading is 'Attach Documentation'. Below this, the 'Document Category' is set to '10 - Consent Form'. A 'QUICK HELP' box with a 'Help About This Page' link is on the right. Instructions state: 'Please click browse to find the file. The file must be in .PDF format and the size limit is 40 MB (megabyte) per file for attachments.' A note specifies: '*Note* If you wish to attach multiple files with the same name, please attach them one at a time to ensure all files are attached properly. The system expects single PDF files. Please do not upload files in PDF Portfolio format. A PDF Portfolio contains multiple files assembled into an integrated PDF unit.' Three 'Choose File' buttons are shown, each with 'No file chosen' text. At the bottom, there are 'Attach Files' and 'Cancel' buttons. The footer contains links for CMS/HHS Vulnerability Disclosure Policy, Privacy Policy, User Agreement, and Adobe Acrobat.

Slide notes

This opens the Attach Documentation page. Use this page to browse your system and select the appropriate .PDF document(s) to upload to the case.

Selected documents must be in PDF format and cannot exceed 40 MB (total size for up to 3 files).

Files with a non-PDF extension or greater than 40 MB will not be accepted.

If you attempt to upload a file that is too big, you will receive the following error: "File size is too large. Please split your files into smaller files and resubmit."

The system accepts single PDF files. Please do not upload files in PDF Portfolio format. A PDF Portfolio contains multiple files assembled into an integrated PDF unit.

The document category is displayed near the top of the page (i.e. Consent Form, Life Care Plan).

If you have selected the wrong document category, click the Cancel button, return to the Case Documents page and click the Add Files link under the desired document category.

Slide 40 of 66 - Choose File

The screenshot displays the 'Workers' Compensation Set-Aside Web Portal' interface. At the top, there are logos for CMS (Center for Medicare & Medicaid Services) and COB&R (Coordination of Benefits and Recovery). 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 'Attach Documentation'. Below this, the 'Document Category' is set to '10 - Consent Form'. A 'QUICK HELP' box with a 'Help About This Page' link is on the right. Instructions state: 'Please click browse to find the file. The file must be in .PDF format and the size limit is 40 MB (megabyte) per file for attachments.' A note specifies: '*Note* If you wish to attach multiple files with the same name, please attach them one at a time to ensure all files are attached properly. The system expects single PDF files. Please do not upload files in PDF Portfolio format. A PDF Portfolio contains multiple files assembled into an integrated PDF unit.' There are three 'Choose File' buttons, each followed by the text 'No file chosen'. At the bottom of the file selection area are 'Attach Files' and 'Cancel' buttons. The footer contains links for CMS/HHS Vulnerability Disclosure Policy, Privacy Policy, User Agreement, and Adobe Acrobat.

Slide notes

To attach a document, enter the file name and path in the text box, or use the “Choose File” button next to the text box to search your system for the desired document.

To attach the selected file, click the Attach Files button.

Once documents are added to a case, the contents of that document cannot be viewed.



Review the document on your system prior to uploading to ensure its accuracy.

Slide 41 of 66 - Adding Files

Adding Files

- Files will be checked for viruses
 - Files containing a virus will not be uploaded

A virus has been detected; your file(s) has not been uploaded.

**Slide notes**

The system shall check file(s) for viruses and reject it if a virus is detected. If a virus is detected, a message will appear that states: A virus has been detected; your file(s) has not been uploaded.

Slide 42 of 66 - File Uploads

The screenshot displays a web interface for file uploads, organized into sections with category numbers and titles. Each section includes an 'Add Files' link (represented by a paperclip icon) and a list of uploaded files with their names, upload dates, and action links (Delete or Replace). The status of each file is indicated by text in parentheses.

Category	File Name	Date	Action	Status
SettlementDoc.pdf	SettlementDoc.pdf	2010-01-20	Delete	
30 - Set-Aside Administrator or Copy of Agreement *				
35 - Medical Records (1st Report of Injury through Recent Treatment) *	MedicalReports_1.pdf	2010-01-20	Replace	(Requires Replacement)
	MedicalReports_2.pdf	2010-01-20	Delete	(Pending Submission)
	MedicalReports_3.pdf	2010-02-08	Delete	(Pending Submission)
40 - Payment History *				
45 - Future Treatment Plans				
50 - Supplement/Additional Information				
55 - WCMSA Attestation Submission Documentation	Submitter Letter.pdf	2010-01-20		

At the bottom of the interface, there is a checkbox for attestation: ☐ * I attest that the documentation attached is complete and accurate to the best of my knowledge.

Navigation buttons at the bottom include: Previous, Next, Save Work-In-Progress, Submit Files, Case Summary, and Cancel Case Creation.

Slide notes

Once the file has been uploaded, the system will list the file name and date the file was uploaded under their respective category.

It will also display one of the following statuses next to the documents: Submitted, Pending Submission, or Requires Replacement.

You may review this list and delete any of the newly uploaded files prior to submitting them by clicking the Delete link that appears to the right of an already uploaded file name.

This will permanently remove the document from the WCMSAP.

Note: Documents can only be deleted from a case that has not yet been submitted.

Once the case has been submitted, you will not be permitted to delete any files that were previously uploaded.

When you have completed attaching files, click the Submit Files button at the bottom of the screen. You must click this button to successfully submit the file to the case. Click Next to continue.

Slide 43 of 66 - Summary Tab

Case Summary

Beneficiary/Claimant * WCMSA Administrator * Diagnosis Codes * Medical * Prescriptions * WC Carrier * Employer * Attorney

Notes Documents * **Summary**

Summary Information

[Print this page](#)

Please review your case information. Please note that a consent form is required prior to case submission. If you need to change the information, click the 'Edit' button. If you are satisfied with the information click the 'Submit Case' button to submit the case. Click 'Cancel Case Creation' to cancel the process, all data will be lost. Click "Save Work-In-Progress" button to save entered data. Print this page for your records.

[View Alerts](#)

Case Number: **WC334578** [Edit](#)

Claimant Information	WC Carrier
Last Name: Doe MI: B. First Name: John Date of Birth: June 12, 1966 Date of Injury: January 19, 2010 Medicare ID: 98765987B SSN: 123-45-9763 Address Line 1: 123 Main Street Address Line 2: Apt B City: Baltimore State: Maryland Zip: 21236 Phone: State where injury occurred: Maryland	Insurer Name: ABC Company Policy Number: J98987654440 Claim Number: 7654309866565 Rx PCN: Rx BIN: Tax ID Number (TIN): Address Line 1: 754 First Street Address Line 2: City: Baltimore State: Maryland Zip: 21236 Phone:

[Edit](#) [Edit](#)

Slide notes

The Summary Information page appears. This page allows you to preview all the information that was entered prior to saving or submitting the case.

Note: If there are still documents pending submission, the system will display the following warning: "Some documents are pending submission. Go to the Documents tab to submit files".

With the exception of the Medicare ID, SSN, Initial Date of Injury, Proposed Settlement Amount, Last Name, First Name, Date of Birth and Gender, you may modify data on all pages at any time prior to a case's submission.

Please note: If the SSN and/or Medicare ID are incorrect, the case must be:

- Canceled if it has not been saved as a Work-In-Progress,
- Deleted if it has been saved as a Work-In-Progress, and
- Closed and re-created with the correct Medicare ID, or SSN if the case was submitted.
- Contact the Electronic Data Interchange (EDI) Department to close a submitted case.
 - Note: The email address for contacting an Electronic Data Interchange (EDI) Representative has changed to COBVA@bcrcgdit.com. However, COBVA emails coming from CMS will now show

the address as COBVA@mail.cms.hhs.gov (Sections 2.4, 10.1, 10.4, Chapter 11, 16.9.2, Chapter 17).

The same data entry validation rules, as well as rules for uploading documentation apply. The system will revalidate any edited data (and previously provided data) for completeness and accuracy.

To make any required changes or additions to previously entered information, simply click the Edit button for the data page you wish to modify.

Slide 44 of 66 - Editing your Information

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

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Case Information

Beneficiary/Claimant * WCMSA Administrator * Diagnosis Codes * Medical * Prescriptions * WC Carrier * Employer * Attorney
Notes Documents *

Summary

Workers' Compensation (WC) Carrier

A superscript ⁽¹⁾ indicates a field required for case submission.

Insurer Name: ¹

Address Line 1: ¹

Address Line 2:

City: ¹ State: ¹ - Select - Zip Code: ¹ -

Phone: ¹ - -

Fax: - -

E-Mail:

Re-enter E-Mail:

Policy Number: ¹ OR Claim Number: ¹

Tax ID Number (TIN):

Rx PCN: RX Bin:

QUICK HELP
[Help About This Page](#)

Previous Next Save Work-In-Progress Case Summary Cancel Case Creation

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

Slide notes

The system will transfer you to the corresponding data page where you can make any required changes.

Once all corrections have been made, click Next to navigate back to the Summary Information page.

Slide 45 of 66 - Submit Case

The screenshot shows a web form for submitting a case. It contains several sections, each with a title and a file upload link:

- 05 - Submitter Letter or Other Summary Documents *
[subLetter.pdf](#)
- 10 - Consent Form *
[ConsentForm.pdf](#)
- 15 - Rated Age Information or Life Expectancy
- 20 - Life Care Plan *
[longCare.pdf](#)
- 25 - Proposed/Final Settlement Agreement or Proposed or Court Ordered *
[longCare.pdf](#)
- 30 - Set-Aside Administrator or Copy of Agreement * (Required for new case submission when the identified case administrator is Professional Administrator)
- 35 - Medical Records (1st Report of Injury through Recent Treatment) *
[Medical.pdf](#)
- 40 - Payment History *
[payment.pdf](#)
- 45 - Future Treatment Plans
- 50 - Supplement/Additional Information

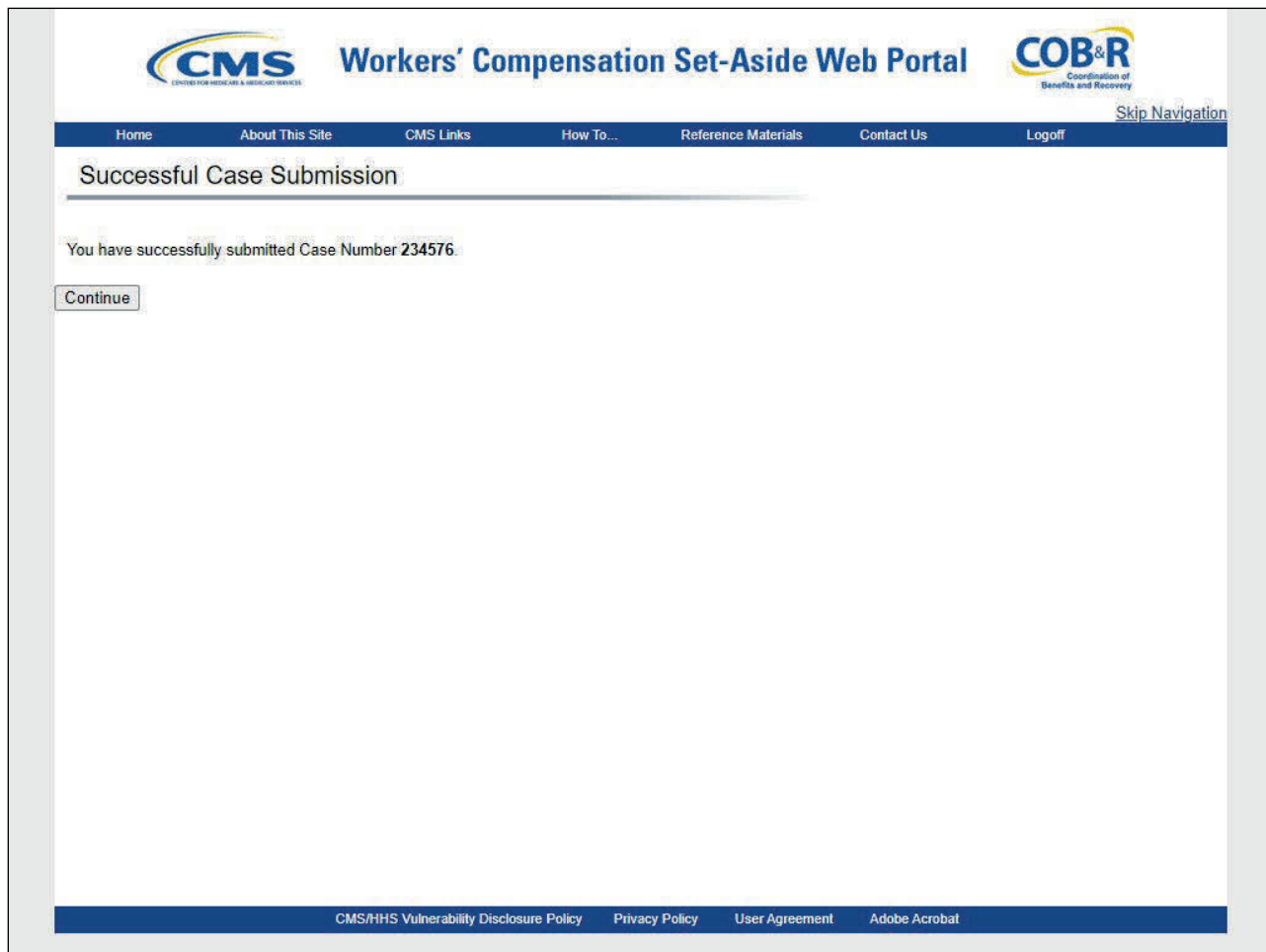
At the bottom of the form is a navigation bar with the following buttons: Previous, Save Work-In-Progress, Manage Access, Submit Case, Cancel Case Creation, and New Search. The 'Save Work-In-Progress' and 'Submit Case' buttons are highlighted with red rectangles.

Slide notes

If all case information is complete and you are ready to submit the case, click Submit Case.

This button is active only after all required case information has been entered and a consent form has been provided.



If you are not ready to submit the case, you can save the case as a Work-In-Progress by clicking the Save Work-In-Progress button.

Slide 46 of 66 - Successful Case Submission**Slide notes**

Once Submit Case is clicked, the Confirm Case Submission page appears. To continue to the Successful Case Submission page, click Continue.

You can return to the WCMSAP at a later time and work on the submitted case by using the Case Lookup process and utilizing the case number provided on the Successful Case Submission page.

Slide 47 of 66 - Summary Information

**Workers' Compensation Set-Aside Web Portal**[Skip Navigation](#)


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Case Summary

Beneficiary/Claimant *WCMSA Administrator *Diagnosis Codes *Medical *Prescriptions *WC Carrier *Employer *Attorney

NotesDocuments *Summary

Summary Information

 [Print this page](#)

Please review your case information. If you need to change the information, click the 'Edit' button. If you are satisfied with the information click the 'Submit Case' button to submit the case. Click 'Cancel Case Creation' to cancel the process, all data will be lost. Click "Save Work-In-Progress" button to save entered data. Print this page for your records.

QUICK HELP
[Help About This Page](#)

[View Alerts](#)

Case Number: 234576

[View](#)

Claimant Information

WC Carrier

[View](#)

Last Name: Doe MI: B. First Name: John

Insurer Name: ABC Company

Date of Birth: June 12, 1966

Policy Number: J98987654440

Date of Injury: January 19, 2010

Claim Number: 7654309866565

SSN:***-**-9763

Rx PCN:

Gender:Male

Rx BIN:

Address Line 1:123 Main Street

Tax ID Number (TIN):

Address Line 2:Apt B

Address Line 1: 754 First Street

City:Baltimore

Address Line 2:

State:Maryland

City: Baltimore

State: Maryland

Slide notes

Once a WCMSA case is submitted successfully, the system will: only display a partial Medicare ID and/or SSN on pages containing a Medicare ID or SSN or both (the system will overlay the first five digits with asterisks).

Slide 48 of 66 - Category Code

The screenshot displays a list of category codes and their corresponding document upload status. The categories are listed on the left, and the status of the uploaded document is shown on the right. The categories are: 05 - Submitter Letter or Other Summary Documents *, 10 - Consent Form *, 15 - Rated Age Information or Life Expectancy, 20 - Life Care Plan *, 25 - Proposed/Final Settlement Agreement or Proposed or Court Ordered *, 30 - Set-Aside Administrator or Copy of Agreement * (Required for new case submission when the identified case administrator is Professional Administrator), 35 - Medical Records (1st Report of Injury through Recent Treatment) *, 40 - Payment History *, 45 - Future Treatment Plans, and 50 - Supplement/Additional Information. The status of the uploaded document is shown as a blue link (e.g., subLetter.pdf, ConsentForm.pdf, longCare.pdf, longCare.pdf, Medical.pdf, payment.pdf) or as a greyed-out button (e.g., Previous, Save Work-In-Progress, Manage Access, Submit Case, Cancel Case Creation, New Search).

Category Code	Document Name
05 - Submitter Letter or Other Summary Documents *	subLetter.pdf
10 - Consent Form *	ConsentForm.pdf
15 - Rated Age Information or Life Expectancy	
20 - Life Care Plan *	longCare.pdf
25 - Proposed/Final Settlement Agreement or Proposed or Court Ordered *	longCare.pdf
30 - Set-Aside Administrator or Copy of Agreement * (Required for new case submission when the identified case administrator is Professional Administrator)	
35 - Medical Records (1st Report of Injury through Recent Treatment) *	Medical.pdf
40 - Payment History *	payment.pdf
45 - Future Treatment Plans	
50 - Supplement/Additional Information	

Previous Save Work-In-Progress Manage Access Submit Case Cancel Case Creation New Search

Slide notes

The system will save any uploaded .PDF files, by category and assign the appropriate two-byte category code number to each uploaded document.

For example, the system will assign “05” to Submitter Letter or Other Summary Documents” and “10” to the Consent Form.

Slide 49 of 66 - After Case Submission

After Successful Case Submission

- After Successful Case Submission the system will:
 - Associate the ID of the user creating the case with the submitted case
 - Associate the ID of the corresponding Account Manager with the submitted case
 - Allow users to review a submitted case immediately upon submission acceptance
 - Allow users to view a listing of the documents submitted for a given case

**Slide notes**

After Successful Case Submission the system will:

- associate the ID of the user creating the case with the submitted case,
- associate the ID of the corresponding Account Manager with the submitted case,
- allow users to review a submitted case immediately upon submission acceptance, and
- allow users to view a listing of the documents submitted for a given case.

Slide 50 of 66 - After Case Submission

After Successful Case Submission

- The system will:
 - Not allow the deletion of any uploaded documents
 - Not allow data to be edited
 - Deny read and write access to (the data contained in) uploaded documentation
 - Bar users from viewing the contents of any attached documentation
 - Not allow users to overwrite a single or multiple (range) of pages in a .PDF file(s) after (or before) case submission

**Slide notes**

The system will:

- not allow the deletion of any uploaded documents,
- not allow data to be edited,
- deny read and write access to (the data contained in) uploaded documentation,
- bar users from viewing the contents of any attached documentation, and
- not allow users to overwrite a single or multiple (range) of pages in a .PDF file(s) after (or before) case submission.

Slide 51 of 66 - After Case Submission

After Successful Case Submission

- The system will:
 - Set the Location/Status to the appropriate value upon case submission
 - Set the status to a value of received (RECD) once the case has been successfully submitted unless the beneficiary is flagged as deceased and
 - Set the status to DECD for a beneficiary flagged as deceased

**Slide notes**

The system will:

- Set the Location/Status to the appropriate value upon case submission,
- Set the status to a value of received (RECD) once the case has been successfully submitted unless the beneficiary is flagged as deceased, and
- Set the status to DECD for a beneficiary flagged as deceased.

Slide 52 of 66 - After Case Submission

After Successful Case Submission

- The system will:
 - Only allow users to access a newly submitted case to which their ID has been associated
 - Allow an Account Manager to immediately modify case assignment, but only for cases associated with corporate and representative
 - Track the submitter, a submission date/timestamp, and the case control number for each submitted case

**Slide notes**

The system will:

- only allow users to access a newly submitted case to which their ID has been associated;
- allow an Account Manager to immediately modify case assignment, but only for cases associated with corporate and representative account types; and
- track the submitter, a submission date/timestamp, and the case control number for each submitted case.

Slide 53 of 66 - Change in Submitter Information

Change in Submitter Information

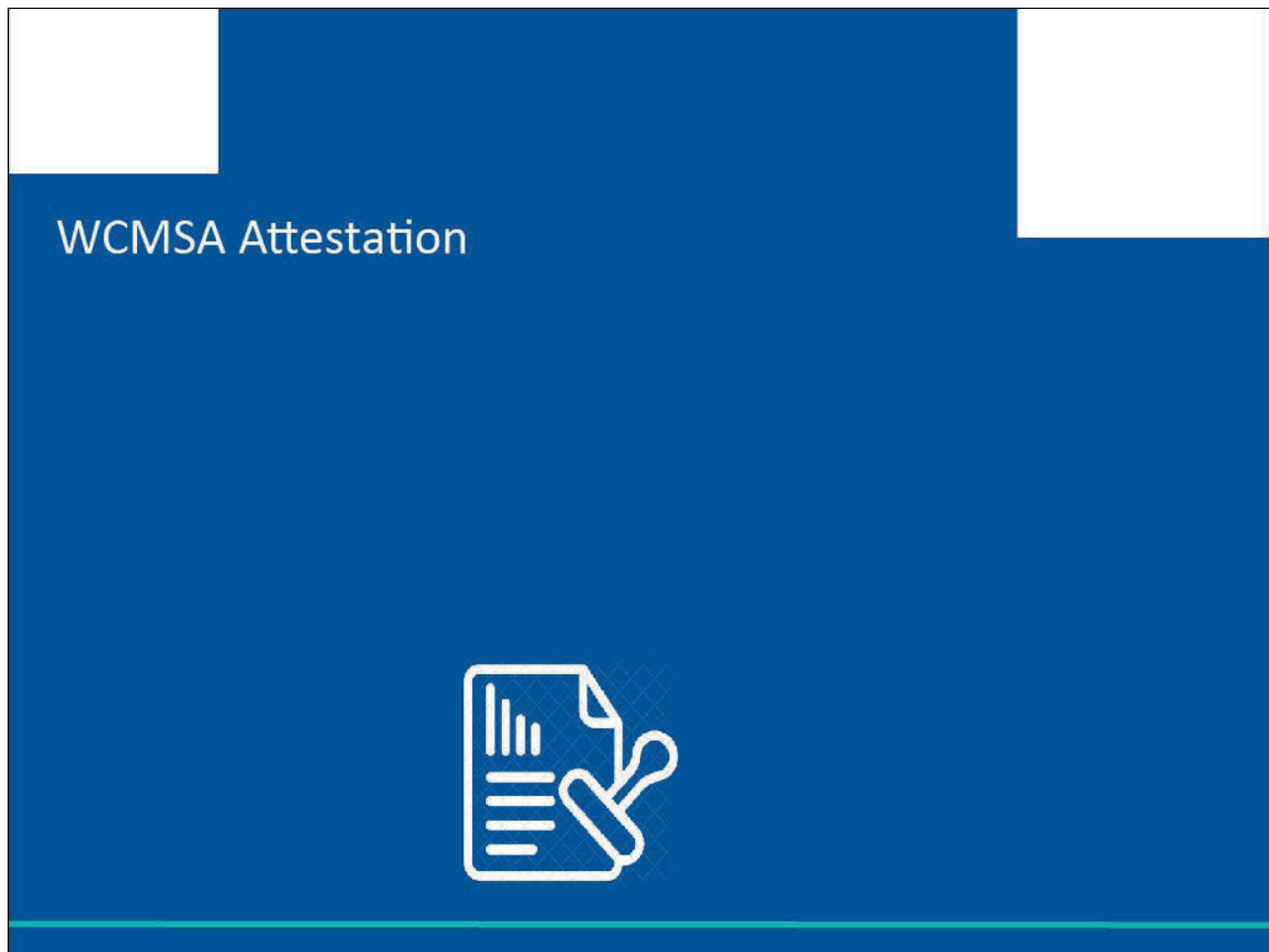
- If there is a change in submitters:
 - CMS requires a written release from services by the original submitter and a new signed Consent to Release form authorizing the new submitter.
 - Both must be provided in order to continue the WCMSA review process.
 - Submitter changes will not be accepted after settlement, and does not constitute a reason for a re-review
 - CMS will not provide copies of existing documentation to the new submitter. Any documentation must be obtained from the incumbent submitter.

Slide notes

If there is a change in submitters:

- CMS requires a written release from services by the original submitter and a new signed Consent to Release form authorizing the new submitter,
- both must be provided to continue the WCMSA review process,
- submitter changes will not be accepted after settlement, and do not constitute a reason for a re-review, and
- CMS will not provide copies of existing documentation to the new submitter. Any documentation must be obtained from the incumbent submitter.

Slide 54 of 66 - WCMSA Attestation



Slide notes

WCMSAP Attestation Process

Slide 55 of 66 - Attestations

Attestations

- WCMSAP Self-Account and Representative users and Medicare beneficiaries who access the WCMSAP from Medicare.gov will have the ability to submit a yearly attestation.
- These users will have the ability to upload documentation with their attestation, but this will not be required.

Slide notes

WCMSAP Self-Account and Representative users and Medicare beneficiaries who access the WCMSAP from Medicare.gov will have the ability to submit a yearly attestation.

These users will have the ability to upload documentation with their attestation, but this will not be required.

Slide 56 of 66 - Case Documentation Page

Case Documentation

Smith, John Medicare ID: 123456789A Case ID: XXXXXX

QUICK HELP

[Help About This Page](#)

This page shows documentation submitted for the case you selected. Click on the document title to read or print the document. Click on the column title to sort the documents by that column. You can search for documents by entering search criteria and clicking the "Search" button. You can also view your WCMSA balance or submit your yearly attestation by clicking the "WCMSA Attestation Information" button.

From Date: / / (MM/DD/CCYY) To Date: / / (MM/DD/CCYY)

No documents were found meeting the entered date criteria. Please try another search by changing the entered dates and selecting the **Search** button or select the **Clear** button to retrieve all available documents associated to the selected Case Number.

There are no documents to view for this case at this time.

Document Category	Creation Date
Life Care Plan	01/06/2008
Rated Age Information or Life Expectancy	11/06/2009
Submitter Letter or Other Summary Documents	01/06/2010
Proposed/Final Settlement Agreement or Court Order	01/06/2010
Payment History	01/06/2010
Proposed/Final Settlement Agreement or Court Order	01/06/2010
Consent Form	12/20/2010
Payment History	01/06/2011

Slide notes

Once Submit Case is clicked, the Confirm Case Submission page displays. To continue to the Successful Case Submission page, click Continue.

You can return to the WCMSAP later and work on the submitted case by using the Case Lookup process and utilizing the case number provided on the Successful Case Submission page.

Slide 57 of 66 - Case Documentation Page

Case Documentation

Smith, John Medicare ID: 123456789A Case ID: XXXXXX

QUICK HELP

[Help About This Page](#)

This page shows documentation submitted for the case you selected. Click on the document title to read or print the document. Click on the column title to sort the documents by that column. You can search for documents by entering search criteria and clicking the "Search" button. You can also view your WCMSA balance or submit your yearly attestation by clicking the "WCMSA Attestation Information" button.

From Date: / / (MM/DD/CCYY) To Date: / / (MM/DD/CCYY)

No documents were found meeting the entered date criteria. Please try another search by changing the entered dates and selecting the **Search** button or select the **Clear** button to retrieve all available documents associated to the selected Case Number.

There are no documents to view for this case at this time.

Document Category	Creation Date
Life Care Plan	01/06/2008
Rated Age Information or Life Expectancy	11/06/2009
Submitter Letter or Other Summary Documents	01/06/2010
Proposed/Final Settlement Agreement or Court Order	01/06/2010
Payment History	01/06/2010
Proposed/Final Settlement Agreement or Court Order	01/06/2010
Consent Form	12/20/2010
Payment History	01/06/2011

Slide notes

This page displays all documentation submitted for the selected case. Select the case link to view the document.

To select another case, use the Case Listing button to view your case list.

Or Use the WCMSA Attestation Information to view your WCMSA balance or submit your yearly attestation.

Slide 58 of 66 - Attestation-Case Documentation

Case Documentation

Smith, John Medicare ID: 123456789A Case ID: XXXXXX

QUICK HELP

[Help About This Page](#)

This page shows documentation submitted for the case you selected. Click on the document title to read or print the document. Click on the column title to sort the documents by that column. You can search for documents by entering search criteria and clicking the "Search" button. You can also view your WCMSA balance or submit your yearly attestation by clicking the "WCMSA Attestation Information" button.

From Date: / / (MM/DD/CCYY) To Date: / / (MM/DD/CCYY)

No documents were found meeting the entered date criteria. Please try another search by changing the entered dates and selecting the **Search** button or select the **Clear** button to retrieve all available documents associated to the selected Case Number.

There are no documents to view for this case at this time.

Document Category	Creation Date
Life Care Plan	01/06/2008
Rated Age Information or Life Expectancy	11/06/2009
Submitter Letter or Other Summary Documents	01/06/2010
Proposed/Final Settlement Agreement or Court Order	01/06/2010
Payment History	01/06/2010
Proposed/Final Settlement Agreement or Court Order	01/06/2010
Consent Form	12/20/2010
Payment History	01/06/2011

Slide notes

From this page, you can view any documentation that has been submitted for your case. If you have multiple cases, you can click on the Case Listing button to select another case. You also have a link to the WCMSA Attestation Information where you can view your WCMSA balance or submit your yearly attestation.

Slide 59 of 66 - Case Documentation

Case Documentation

Smith, John Medicare ID: 123456789A Case ID: XXXXXX

QUICK HELP

[Help About This Page](#)

This page shows documentation submitted for the case you selected. Click on the document title to read or print the document. Click on the column title to sort the documents by that column. You can search for documents by entering search criteria and clicking the "Search" button. You can also view your WCMSA balance or submit your yearly attestation by clicking the "WCMSA Attestation Information" button.

From Date: / / (MM/DD/CCYY) To Date: / / (MM/DD/CCYY)

No documents were found meeting the entered date criteria. Please try another search by changing the entered dates and selecting the **Search** button or select the **Clear** button to retrieve all available documents associated to the selected Case Number.

There are no documents to view for this case at this time.

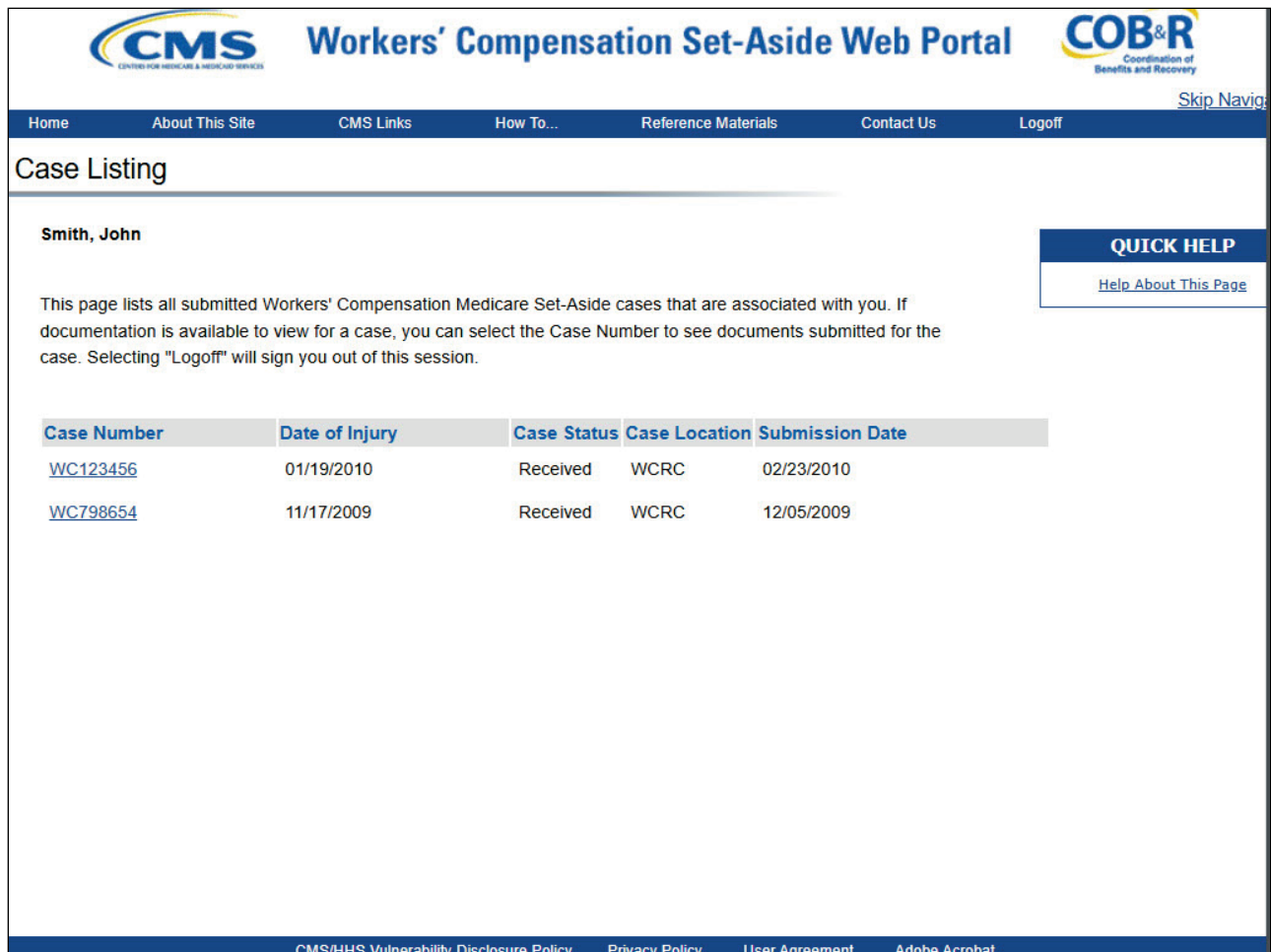
Document Category	Creation Date
Life Care Plan	01/06/2008
Rated Age Information or Life Expectancy	11/06/2009
Submitter Letter or Other Summary Documents	01/06/2010
Proposed/Final Settlement Agreement or Court Order	01/06/2010
Payment History	01/06/2010
Proposed/Final Settlement Agreement or Court Order	01/06/2010
Consent Form	12/20/2010
Payment History	01/06/2011

Slide notes

This page shows all documentation submitted for the selected case. Select the case link to view the document.

To select another case, use the Case Listing button to view your case list.

Or Use the WCMSA Attestation Information to view your WCMSA balance or submit your yearly attestation.

Slide 60 of 66 - Attestation- Case Listing

The screenshot displays the 'Workers' Compensation Set-Aside Web Portal'. At the top, there are logos for CMS (Centers for Medicare & Medicaid Services) and COB&R (Coordination of Benefits and Recovery). A navigation bar includes links for Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Logoff. The main heading is 'Case Listing'. Below this, the user's name 'Smith, John' is displayed. A 'QUICK HELP' button with a link 'Help About This Page' is on the right. A text block explains that the page lists submitted Workers' Compensation Medicare Set-Aside cases associated with the user and provides instructions on how to view case documentation. Below the text is a table with the following data:

Case Number	Date of Injury	Case Status	Case Location	Submission Date
WC123456	01/19/2010	Received	WCRC	02/23/2010
WC798654	11/17/2009	Received	WCRC	12/05/2009

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

Slide notes

Clicking the Case Listing link will take you to the Case Listing Page where a list of all cases submitted into WCMSAP will appear if they are associated to you in Medicare.gov. To go back to the documentation page and view the documents for that case, click the case number link.

Slide 61 of 66 - WCMSA Account Balance and Attestation Submission Page

WCMSA Account Balance and Attestation Submission

Every year, no later than 30 days after the anniversary date of your Worker's Compensation settlement, the administrator of the WCMSA funds must send an attestation to Medicare's Benefits Coordination Recovery Center (BCRC) stating that the funds in the account have been used correctly. Individuals who have a CMS-approved WCMSA as part of a workers' compensation settlement agreement may only use the funds in the WCMSA account to pay for Medicare-covered medical services and Medicare-covered prescription drug expenses that are related to their workers' compensation injury, illness, or disease.

To submit your attestation, review the information below, select the appropriate attestation statement, enter the applicable monies spent, and select the attestation checkbox. If you want to submit a copy of your accounting records, click the [Upload Documentation](#) link to upload this document. Once you are ready to submit your information, click **Submit Attestation**. Click **View Attestations** to view attestations previously submitted on the WCMSAP. Click **Cancel** if you do NOT wish to submit your attestation at this time.

Please Note: If the anniversary date for the current payout period has passed, the **Current Balance** will include the next payout amount.

Case ID: WC123456 Medicare ID: 123456A
 Name: GDOT Corp Date of Injury: 4/12/2019
 Total MSA: \$123.00 Settlement Date: 4/12/2019
 Payout Method: Structured Annuity Initial Deposit: \$2.34
 Current Balance: \$2.00 Anniversary Date: 1/1/2019
 No. of Years: 2

Payout Schedule: 123456A

Payment	Amount	Payment Date
1	5833.33	6/1/2017
2	5833.33	6/1/2018
3	5833.33	6/1/2019
4	5833.33	7/1/2019

I, the undersigned, attest that I have a **structured annuity** WCMSA and have:

☐ Used the annual monies from the WCMSA account for the period of / / to / /

☐ Used the monies from the WCMSA account for the period of / / to / /

☐ **EXHAUSTED** the annual money (and any applicable carry-over from previous years) in the WCMSA account for the period of / / to / /

☐ **COMPLETELY EXHAUSTED** all monies in the WCMSA account for the period of / / to / /

To pay for the following:

Medical expenses: \$.

Prescription drug expenses: \$.

Taxes paid on interest earned: \$.

The interest earned on these funds was: \$.

☐ I acknowledge and understand that failure to follow any of the Medicare requirements for the use of this money will be regarded as failure to reasonably recognize Medicare's interests and that Medicare will deny coverage for all medical treatments and prescription drug expenses due to my work-related injuries up to the total workers' compensation settlement amount.

CMS reserves the right to audit how you spend the funds in your WCMSA account. Therefore, CMS recommends that you retain your WCMSA records for a period of seven (7) years.

To upload supporting documentation, click the [Upload Documentation](#) link. [Upload Documentation](#)

Documentation uploaded:
 WCMSA Account Records.pdf 2010-01-20 [Delete](#)

[Submit Attestation](#) [View Attestations](#) [Cancel](#)

Slide notes

If you select the WCMSA Attestation Information from the Case Information screen, you will be taken to the WCMSA Account Balance and Attestation Submission page. Every year, no later than 30 days after the anniversary date of your Worker's Compensation settlement, the administrator of the WCMSA funds must send an attestation to Medicare's Benefits Coordination Recovery Center (BCRC) stating that the funds in the account have been used correctly.

To submit your attestation, review the information below, select the appropriate attestation statement, enter the applicable monies spent, and select the attestation checkbox. If you want to submit a copy of your accounting records, click the Upload Documentation link to upload this document. Once you are ready to submit your information, click Submit Attestation. Click View Attestations to view attestations previously submitted on the WCMSAP. Click Cancel if you do NOT wish to submit your attestation at this time.

Note: To assist beneficiaries and administrators when submitting Workers' Compensation Medicare Set Aside Arrangements (WCMSA) account information, the WCMSA Account Balance and Attestation Submission, Attestation Submission Verification, and Attestation Submission Confirmation pages have been updated to include new calculation fields including the Grand total of Expenditures and Balance

of WCMSA account at the end of the Attestation period. Additionally, the field Interest earned on these funds has been renamed Total of Interest Income the Account Earned, that is if any interest has been earned (Section 13.5).

Slide 62 of 66 - WCMSA Attestation Submission Verification

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

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

WCMSA Attestation Submission Verification

QUICK HELP
[Help About This Page](#)

Please review the WCMSA attestation information below to verify that this is correct for **Case Number:** WC123456.
If the information is correct, click **Continue** to submit your attestation. Click **Previous** to return to the previous page to make changes. Click **Cancel** to cancel your attestation submission.

Payout method: Structured Annuity
For the period of: 06-06-2019 to 08-06-2019
Medical services: \$112.30
Prescription drug expenses: \$12.30
Taxes paid on interest earned: \$12.30
Interest earned: \$20.30
New balance: \$375.60
Documentation uploaded: WCMSA Account Records.pdf

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

Slide notes

The information entered will appear on the WCMSA Attestation Submission Verification page. Use the previous button to return to the form and make any needed changes and the Continue button to proceed to the confirmation page. If you wish to cancel and return to the Case Listing page, click cancel.

Slide 63 of 66 - WCMSA Attestation Submission Confirmation

CMS CENTERS FOR MEDICARE & MEDICAID SERVICES

Workers' Compensation Set-Aside Web Portal

COB&R Coordination of Benefits and Recovery

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WCMSA Attestation Submission Confirmation

QUICK HELP
[Help About This Page](#)

You have successfully submitted your WCMSA attestation for **Case Number:** WC123456.
Click Continue to return to the Case Documentation page.

Payout method: Structured Annuity
For the period of: 06-06-2019 to 08-06-2019
Medical services: \$112.30
Prescription drug expenses: \$12.30
Taxes paid on interest earned: \$12.30
Interest earned: \$20.30
New balance: \$375.60
Documentation uploaded: WCMSA Account Records.pdf

[Continue](#)

Slide notes

When continuing, the WCMSA Attestation Submission Confirmation page will appear confirming that your attestation was successfully submitted. Continue will return you back to the Case Documentation page.

Slide 64 of 66 - Course Summary

Course Summary



Now that you have completed this course, you will be able to:

- Discuss how to create a case in the WCMSAP
- Describe how to save and edit a work-in progress (WIP) case
- Explain how to submit a WCMSA case
- Complete the yearly attestation information

**Slide notes**

Now that you have completed this course, you will be able to:

- discuss how to create a case in the WCMSAP,
- describe how to save and edit a work-in progress (WIP) case,
- explain how to submit a WCMSA case, and
- complete the yearly attestation information.

Slide 65 of 66 - Conclusion

You have completed the Case Submission 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 Case Submission course. The information in this course can be referenced by using the document at the link below: [WCMSAP User Guide](#).

Slide 66 - of 66 – WCMSAP Training Survey



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

Survey



Slide notes

If you have any questions or feedback on this material, please go to the following URL: [WCMSAP User Guide](#).