Case Submission

Slide 1 of 66 - Case Submission

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.

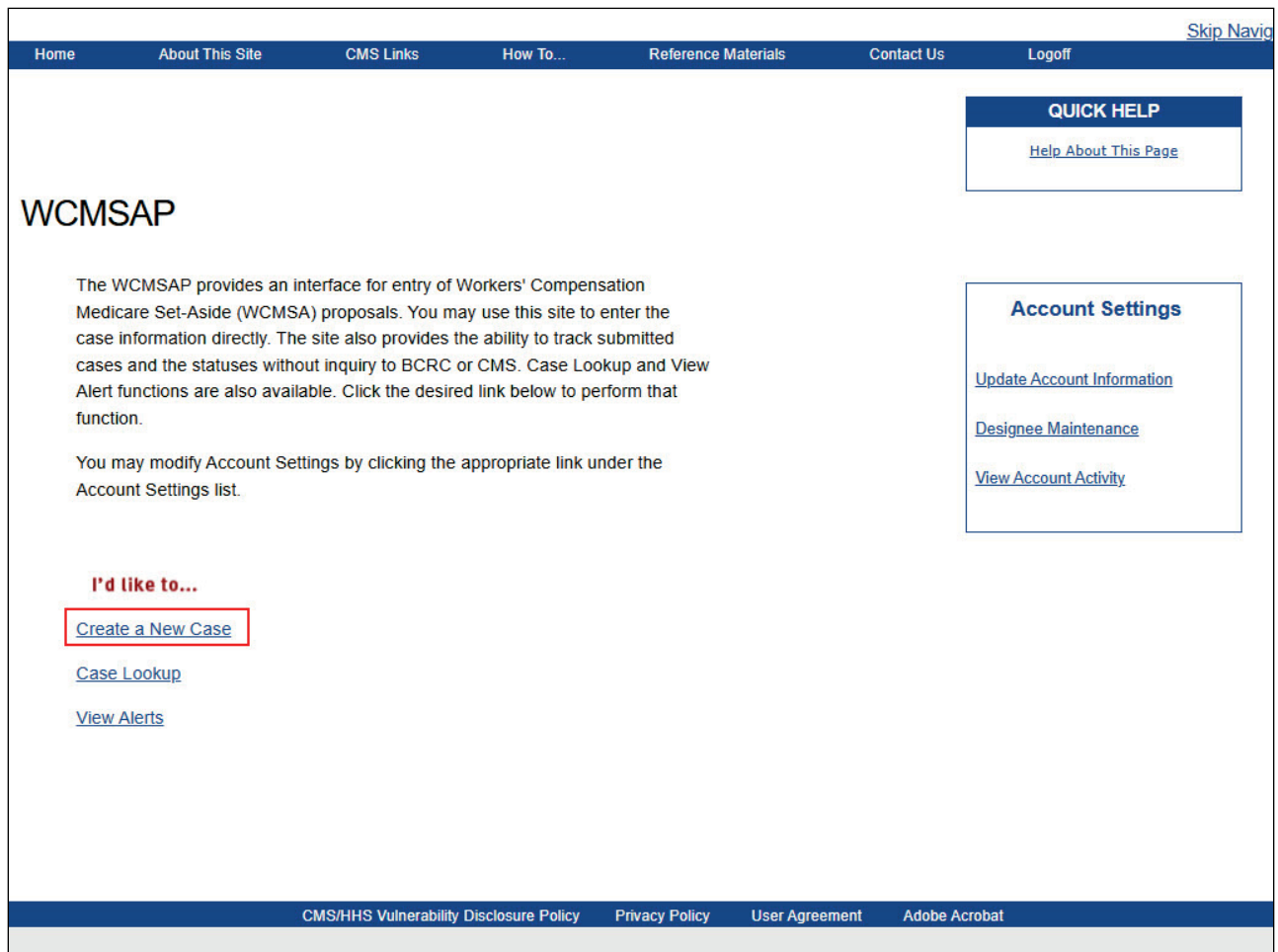**Slide 3 of 66 - Course Overview**

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

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

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

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

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

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
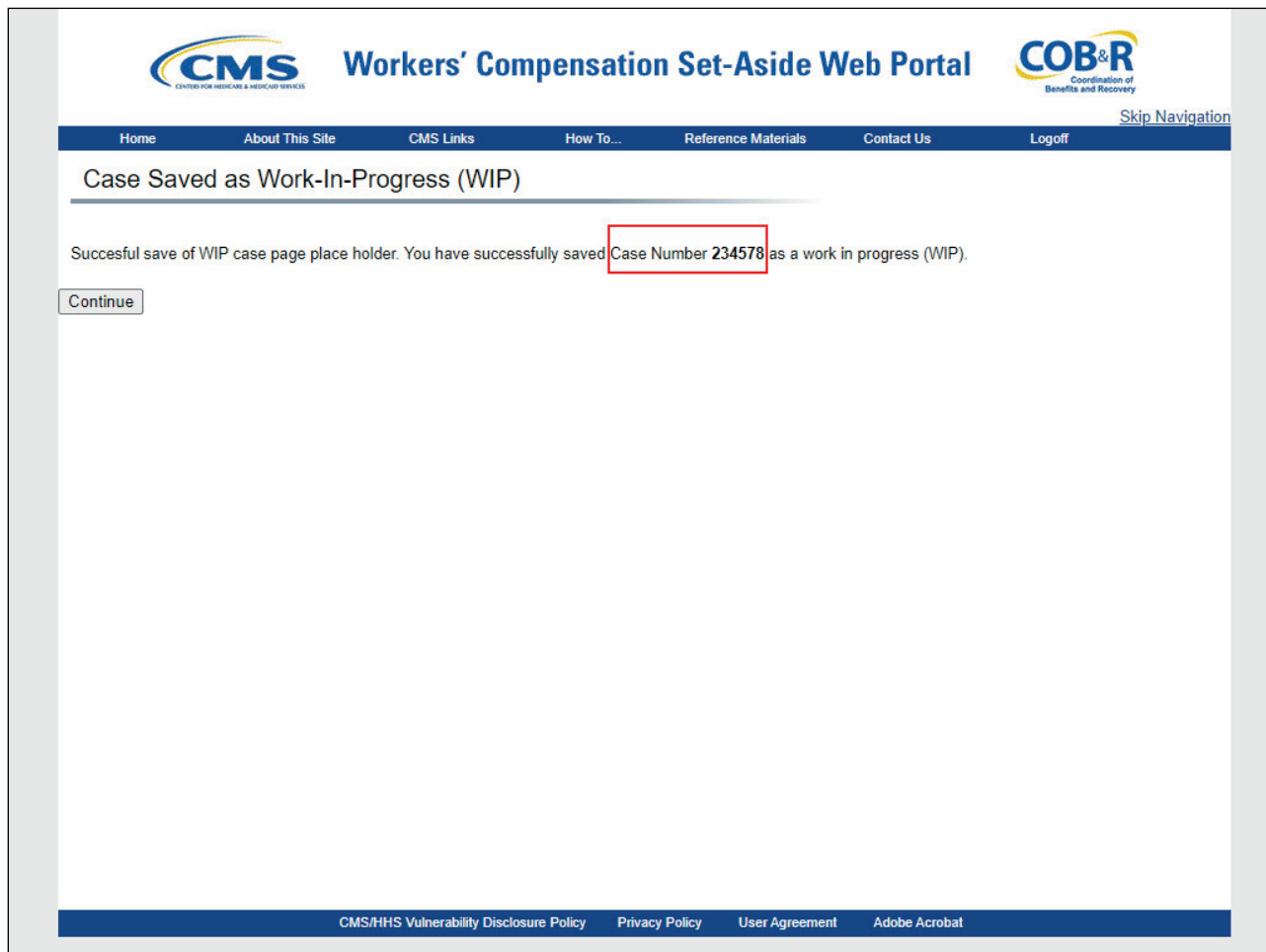
Slide notes

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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
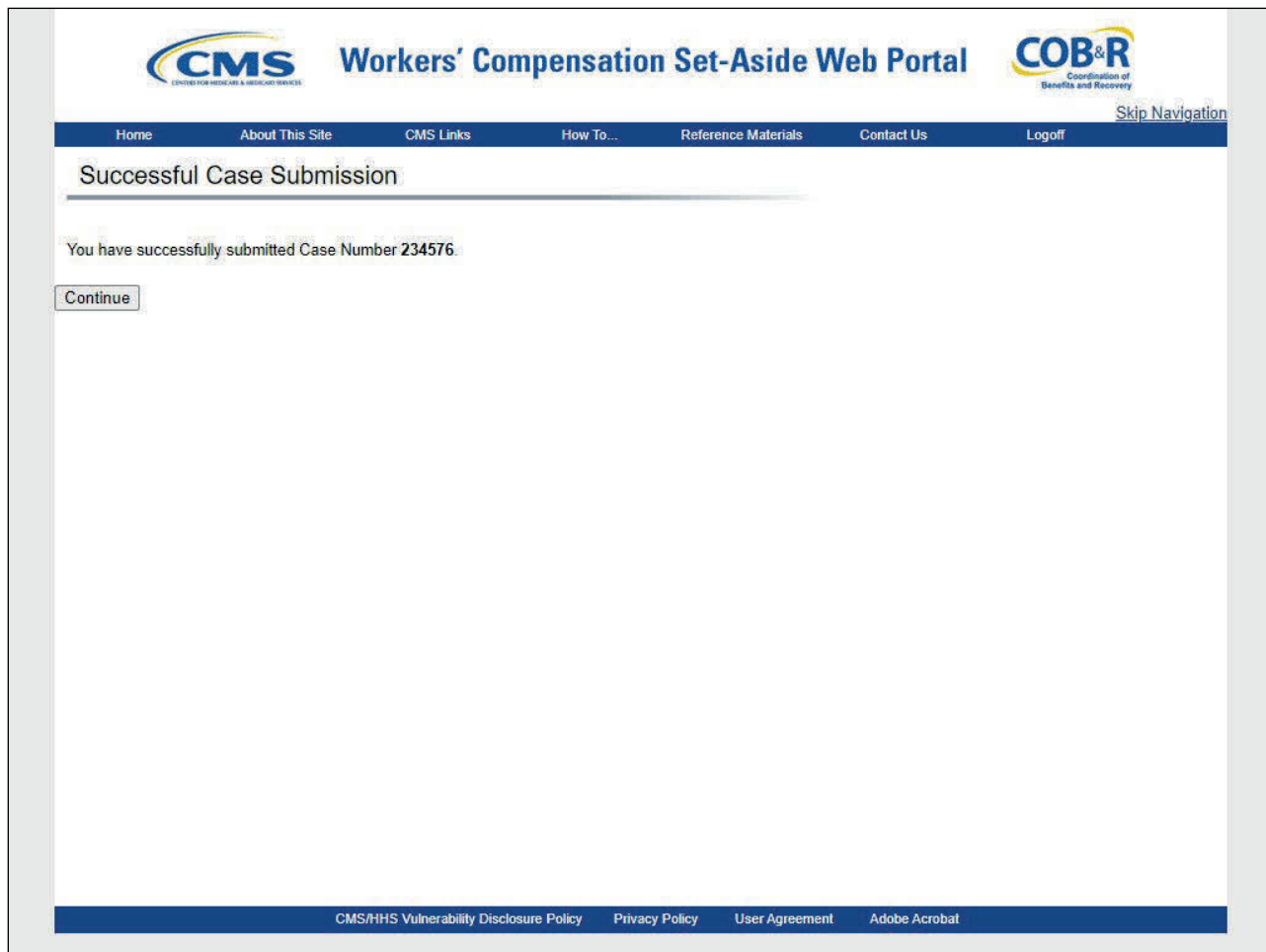
Slide notes

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

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

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

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
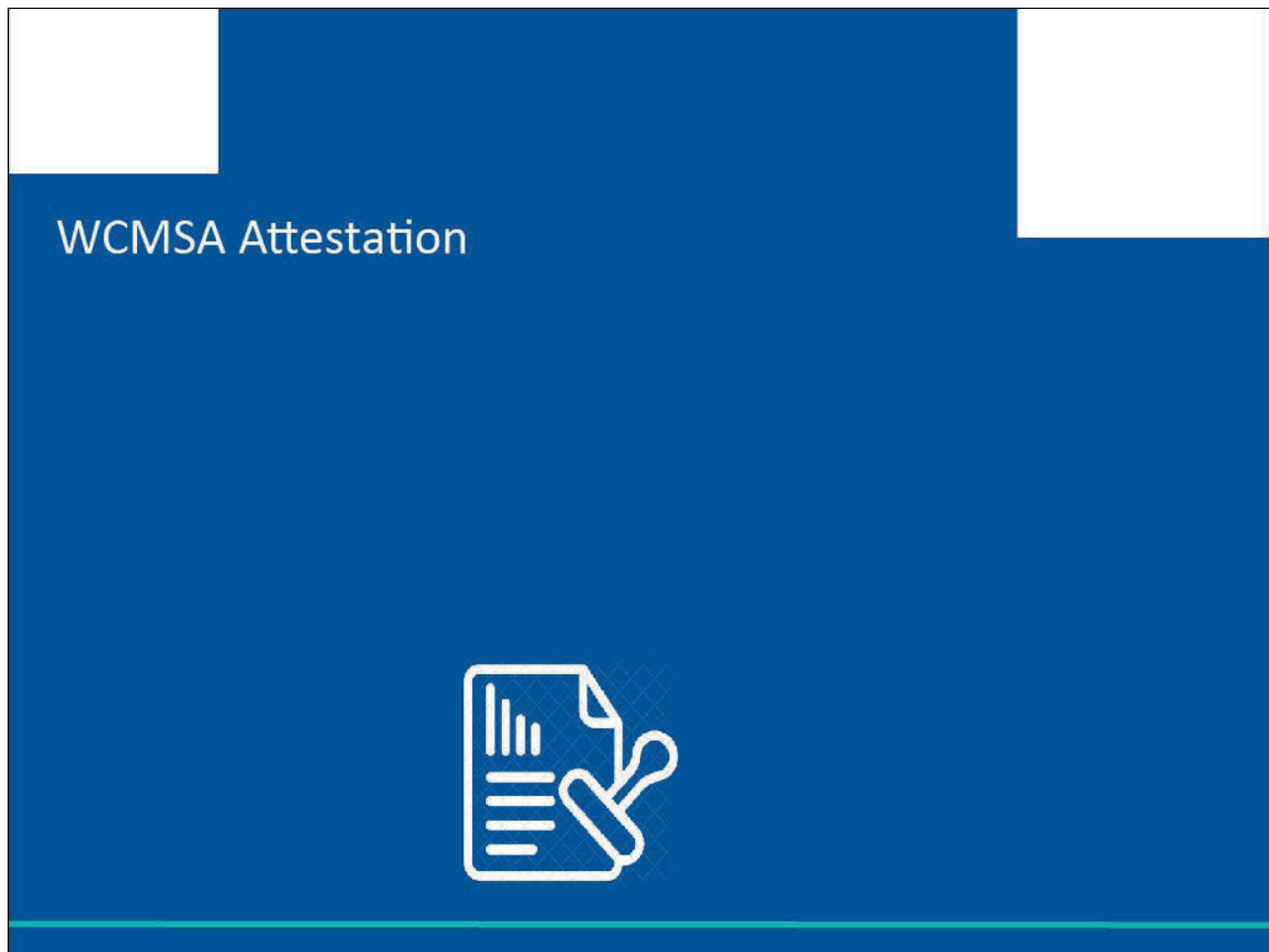
Slide notes

WCMSAP Attestation Process

Slide 55 of 66 - Attestations

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

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)

[Search] [Clear]

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)

[Search] [Clear]

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.

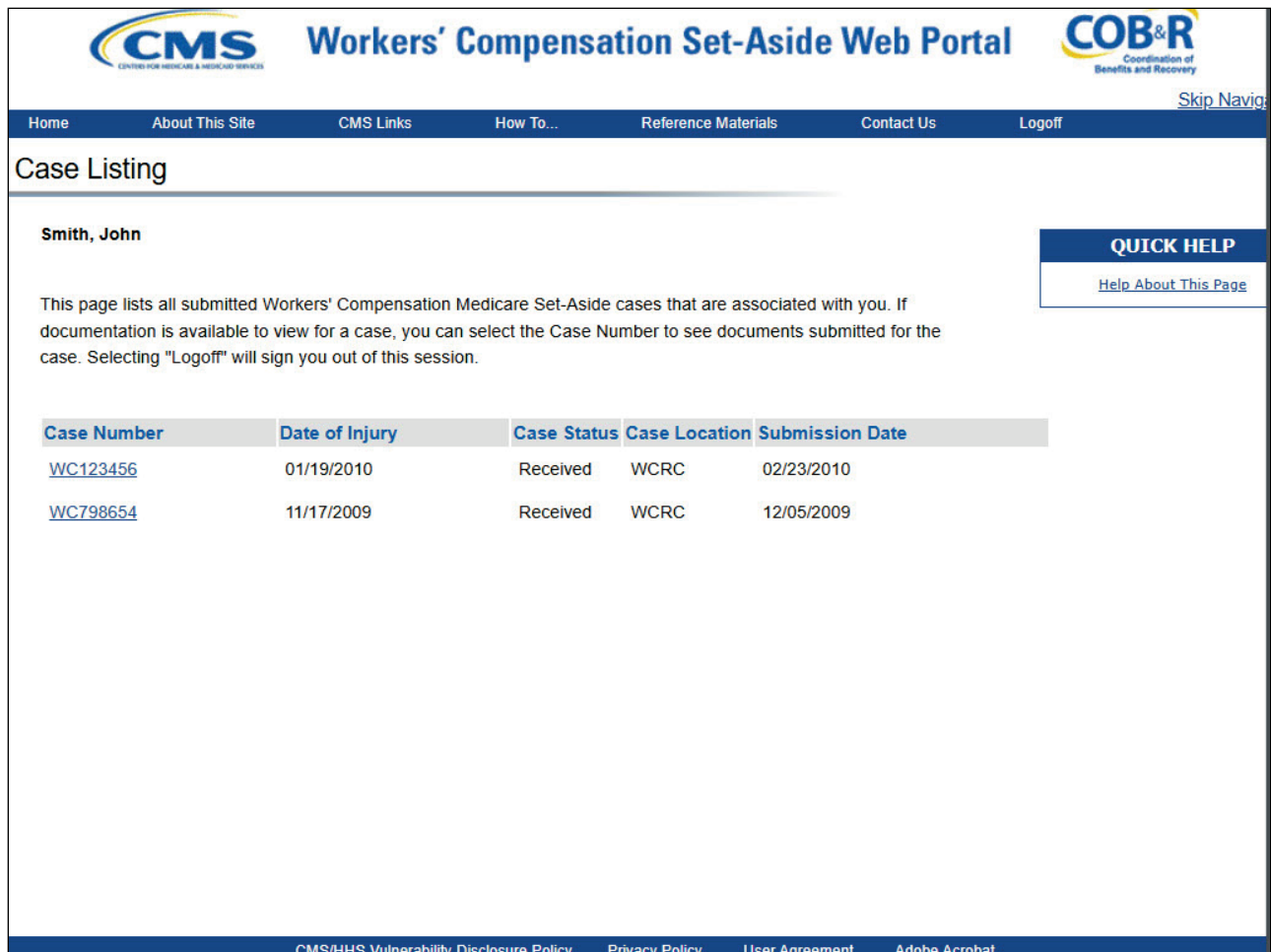There are no documents to view for this case at this time.

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

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

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

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

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

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

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

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

Slide notes

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