

Workers' Compensation Attestation Enhancement Webinar for Corporate Users and Professional Administrators

November 6, 2019

Presentation Topics

- Background Information
- Purpose of Enhancement
- Registering as a Professional Administrator
- Functionality for a Professional Administrator
- Change for Corporate Users
- Resources

Background Information

- Each year, no later than 30 days after the anniversary date of the Workers' Compensation settlement, an attestation must be sent to Medicare's Benefits Coordination & Recovery Center (BCRC) stating that the funds in the account were used correctly.
- In the past, transactions regarding Workers' Compensation Medicare Set-Aside accounts, including annual attestations, had to be completed using U.S. Mail.

Purpose of Enhancement

- To allow Professional Administrators (PAs) to create a Workers' Compensation Medicare Set-Aside account in order to:
 - Upload account transaction files for WCMsAs they administer
 - Download response files for each submitted file
 - Reconcile WCMsA balances with current balance stored on the WCMsAP
 - Eliminate the need to use U.S. Mail, but mailing is still an option if preferred

Registering as a Professional Administrator

- In order to use the WCMSAP, Professional Administrators will be required to complete a two-step process:
 - Step one: Registration
 - Step two: Account Setup
 - Registration will be completed by the Account Representative (AR)
 - Account Setup will be performed by the Account Manager (AM)
 - AM will control the administration of the PA Account

Registering as a Professional Administrator (2)

- Entities who wish to utilize the WCMSAP as a Professional Administrator are required to create a new WCMSAP account.
- After account setup, the AM or AD for the account can request case access for each case they have authority to administer and are required to provide the current/opening balance for all existing WCMSAs they want to administer on the WCMSAP before transaction records will be accepted for the case.
 - Note: Professional Administrators will only need to provide the opening balance for cases that were set up prior to this enhancement.

Login Warning Page

- Click “I Accept” to continue to the Welcome Page.



Workers' Compensation Set-Aside Web Portal



Login Warning  [Print this page](#)

UNAUTHORIZED ACCESS TO THIS COMPUTER SYSTEM IS PROHIBITED BY LAW

This warning banner provides privacy and security notices consistent with applicable federal laws, directives, and other federal guidance for accessing this Government system, which includes: (1) this computer network, (2) all computers connected to this network, and (3) all devices and storage media attached to this network or to a computer on this network. This system is provided for Government-authorized use only.

Unauthorized or improper use of this system is prohibited and may result in disciplinary action and/or civil and criminal penalties

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

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

*You have no reasonable expectation of privacy regarding any communication or data transiting or stored on this system.

*The Government may monitor, record, and audit your system usage, including usage of personal devices and email systems for official duties or to conduct HHS business. Therefore, you have no reasonable expectation of privacy regarding any communication or data transiting or stored on this system. At any time, and for any lawful Government purpose, the Government may monitor, intercept, and search and seize any communication or data transiting or stored on this system.

*Any communication or data transiting or stored on this system may be disclosed or used for any lawful Government purpose.

<http://www.cms.hhs.gov/About-CMS/Agency-Information/Aboutwebsite/Security-Protocols.html>

Privacy Act Statement

The collection of this information is authorized by 42 U.S.C. 1395y(b)(5). The information collected will be used to identify and recover past mistaken Medicare primary payments and to prevent Medicare from making mistakes in the future for those Medicare Secondary Payer situations that continue to exist.

Attestation of Information

I have submitted all relevant information obtained and/or have knowledge of regarding this claimant, that was generated at any time on or after the Date of Incident (DOI) for the alleged accident/illness/injury/incident at issue, and has been included as part of this submission of the proposed amount for this WCMSA to the Centers for Medicare & Medicaid Services.

The information provided is complete, truthful, accurate, and meets all requirements set forth to use this process; and, I have read and understand all of the Centers for Medicare & Medicaid Services information at [Workers Compensation Agency Services](#)

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

[Decline](#)

¹ A Privacy Act system of records is a group of any records about individuals and under the control of any Federal agency from which information is retrieved by the name or other personal identifier of the individual.

[Privacy Policy](#) [User Agreement](#) [Adobe Acrobat](#)

Welcome to WCMSAP

- Click the New Registration link to get started registering for your Professional Administrator account.
- User will return to this page to login once account setup is completed.
- Note: Registering for an account is a two-step process, the user will come back to complete Step 2.

The screenshot displays the 'Workers' Compensation Set-Aside Web Portal' interface. At the top, there are logos for CMS and COB&R. A navigation bar includes links for 'About This Site', 'CMS Links', 'How To...', 'Reference Materials', and 'Contact Us', along with a 'Skip Navigation' link. The main heading is 'Welcome to the WCMSAP'. Below this, a paragraph explains the site's purpose: providing an interface for entering Workers' Compensation Medicare Set-Aside Arrangements (WCMSA) proposals. It mentions that attorneys, Medicare beneficiaries, claimants, insurance carriers, and WCMSA vendors can use the site to enter case information directly. It also notes that the site provides attorneys, Medicare beneficiaries, claimants, insurance carriers, and WCMSA vendors with the ability to track their submitted cases and statuses without inquiry to the Benefits Coordination & Recovery Center (BCRC) or the Centers for Medicare & Medicaid Services (CMS). A link is provided for more information: <http://www.medicare.gov/about-us/nondiscrimination/nondiscrimination-notice.html>. On the right side, there is a 'Sign into your account' section with fields for 'User Name:' and 'Password:', each with a 'Forgot' link below it. 'Login' and 'Clear' buttons are at the bottom of this section. Below the main text, there is a 'WCMSAP Message' section with 'N/A' and a 'GETTING STARTED' section with a link to 'How To Get Started'. At the bottom, two buttons are highlighted: 'STEP 1 New Registration' (with a red border) and 'STEP 2 Account Setup' (with a blue border and a note '(Account ID and PIN required)').

Select Account Type



Workers' Compensation Set-Aside Web Portal



[Skip Navigation](#)

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

Select Account Type

QUICK HELP
[Help About This Page](#)

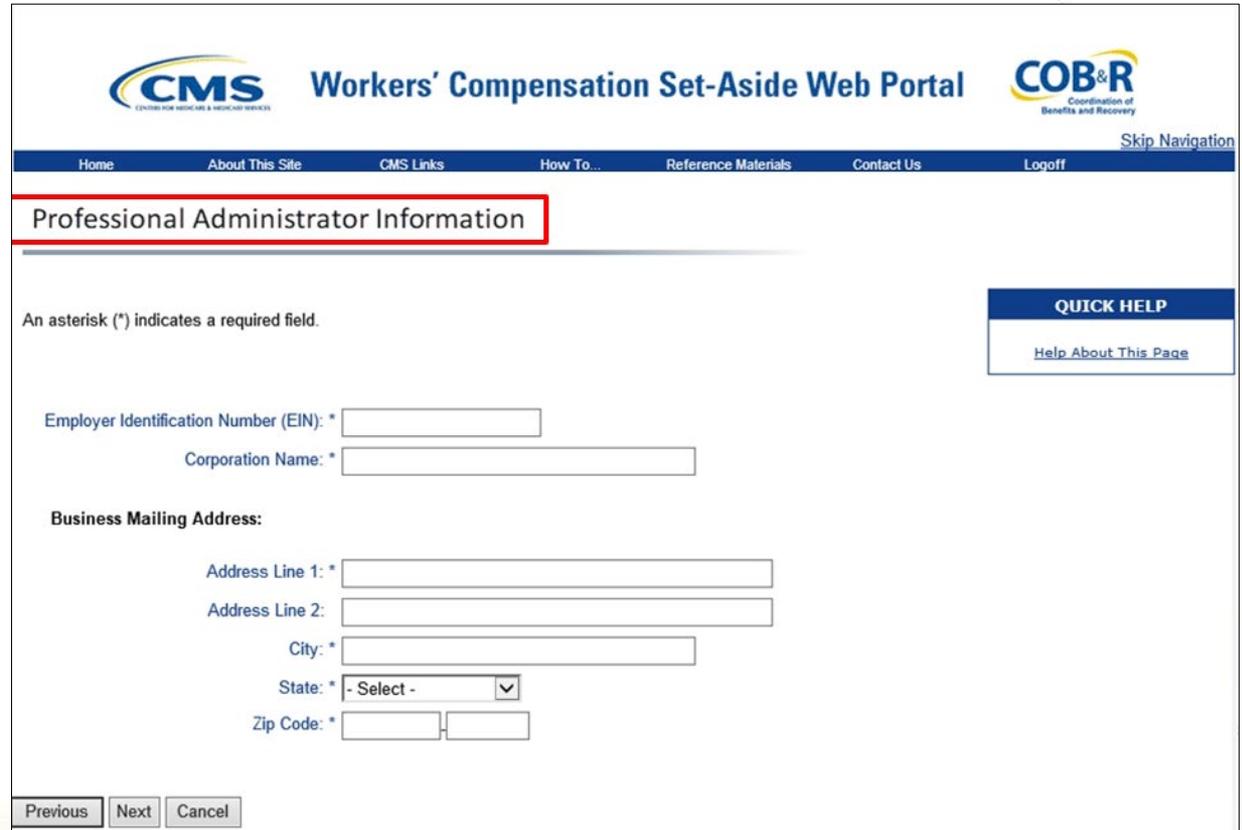
Please select the type of account for which you are registering:

- Corporate**
A corporate account type indicates that the submitter is registering as a corporate entity with an Employer Identification Number (EIN) and will be regularly submitting WCMSA requests.
- Representative**
A representative account type is for non-corporate WCSA submitters. These submitters do not have an EIN, but will be submitting multiple cases.
- Self**
Self submitters are Medicare beneficiaries or future Medicare beneficiaries (claimant) submitting a case on their own behalf. The registrant must be a Medicare beneficiary or claimant and may only submit cases for themselves.
- Professional Administrator**
A professional administrator account type indicates that the entity is registering with an Employer Identification Number (EIN) and will be the responsible party for administering MSA funds and reporting to Medicare.

[Previous](#) [Next](#)

Professional Administrator Information

- All information with an asterisk (*) is a required field.
- Click Next to continue.



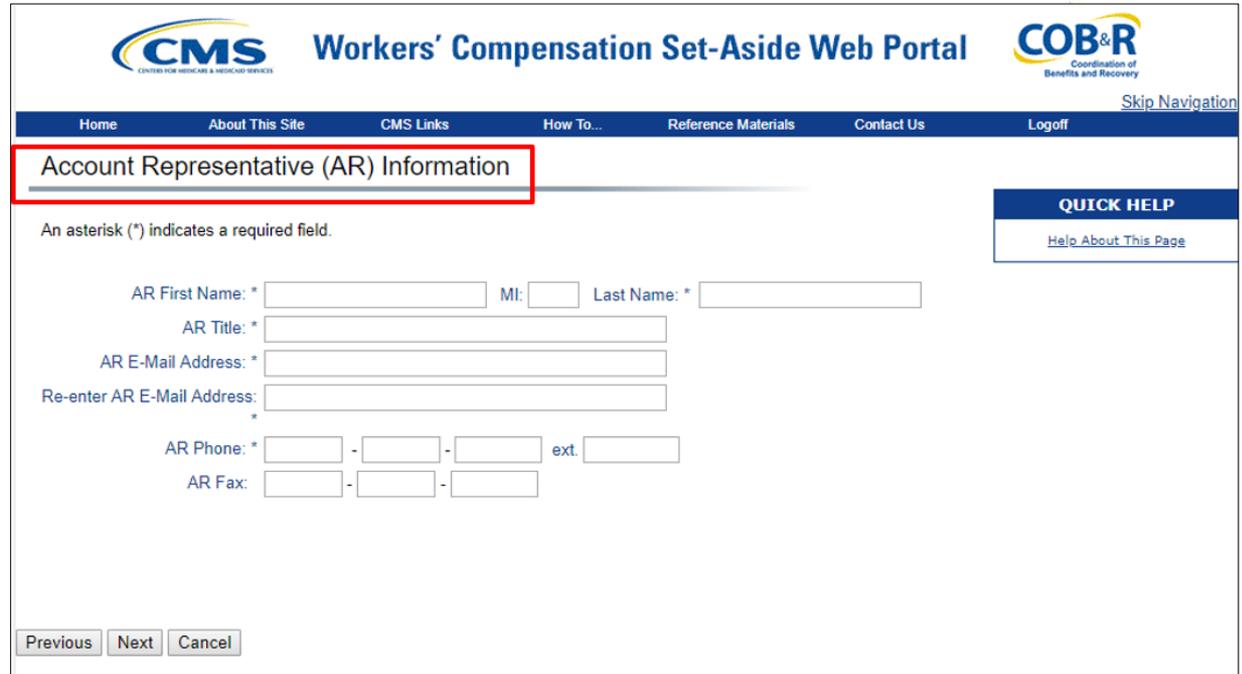
The screenshot shows the 'Professional Administrator Information' form within the 'Workers' Compensation Set-Aside Web Portal'. The form includes a navigation bar with links for Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Logoff. A 'QUICK HELP' button is located on the right side of the form. The form fields are as follows:

- Employer Identification Number (EIN): *
- Corporation Name: *
- Business Mailing Address:**
 - Address Line 1: *
 - Address Line 2:
 - City: *
 - State: * - Select -
 - Zip Code: *

Navigation buttons at the bottom: Previous, Next, Cancel.

Account Representative (AR) Information

- All information with an asterisk (*) indicates a required field.
- Click Next to continue.



The screenshot shows the 'Workers' Compensation Set-Aside Web Portal' with the 'Account Representative (AR) Information' section highlighted. The form includes the following fields:

- AR First Name: *
- MI:
- Last Name: *
- AR Title: *
- AR E-Mail Address: *
- Re-enter AR E-Mail Address: *
- AR Phone: * - - ext.
- AR Fax: - -

Navigation buttons at the bottom: Previous, Next, Cancel.

Quick Help: [Help About This Page](#)

Registration Summary

- Review all information previously entered.
- Click Edit next to each section to make any corrections.
- Click Submit Registration.

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

Registration Summary

[Print this page](#)

Please review your registration information. If you need to change the information, click the "Edit" button. If you are satisfied with the information, click the "Submit Registration" button to submit the registration. Click the "Cancel" Button to cancel the process: all data will be lost. Click the "Previous" button to return to the previous screen. Print this page for your records.

Account Type: Professional Administrator

Professional Administrator Information

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

Business Mailing Address:

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

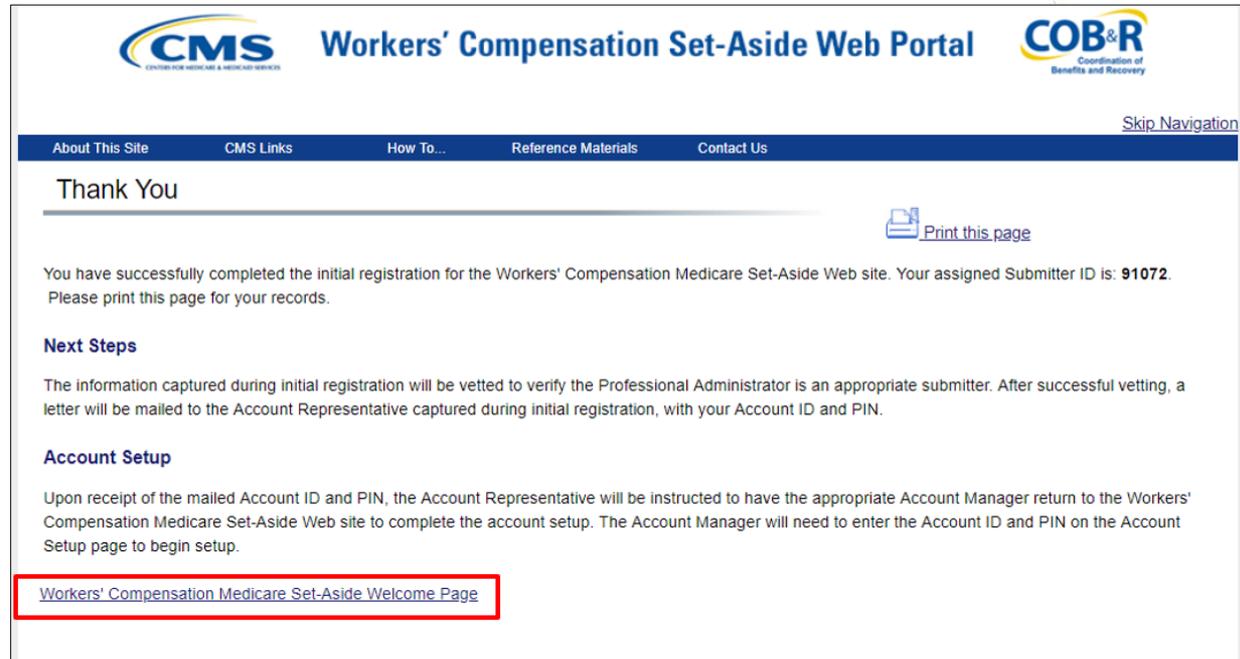
Account Representative Information

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

Privacy Policy User Agreement Adobe Acrobat

Thank You

- You have successfully completed registration.
- Your information will need to be vetted to verify you are an appropriate submitter.
- The Account Representative will receive a letter with your Account ID and PIN.
- The AR will use this information to complete your account setup.



The screenshot shows the 'Workers' Compensation Set-Aside Web Portal' with the CMS logo and COB&R logo. The page title is 'Thank You'. A navigation bar includes links for 'About This Site', 'CMS Links', 'How To...', 'Reference Materials', and 'Contact Us', along with a 'Skip Navigation' link. A 'Print this page' icon is visible. The main content area contains the following text:

You have successfully completed the initial registration for the Workers' Compensation Medicare Set-Aside Web site. Your assigned Submitter ID is: **91072**. Please print this page for your records.

Next Steps

The information captured during initial registration will be vetted to verify the Professional Administrator is an appropriate submitter. After successful vetting, a letter will be mailed to the Account Representative captured during initial registration, with your Account ID and PIN.

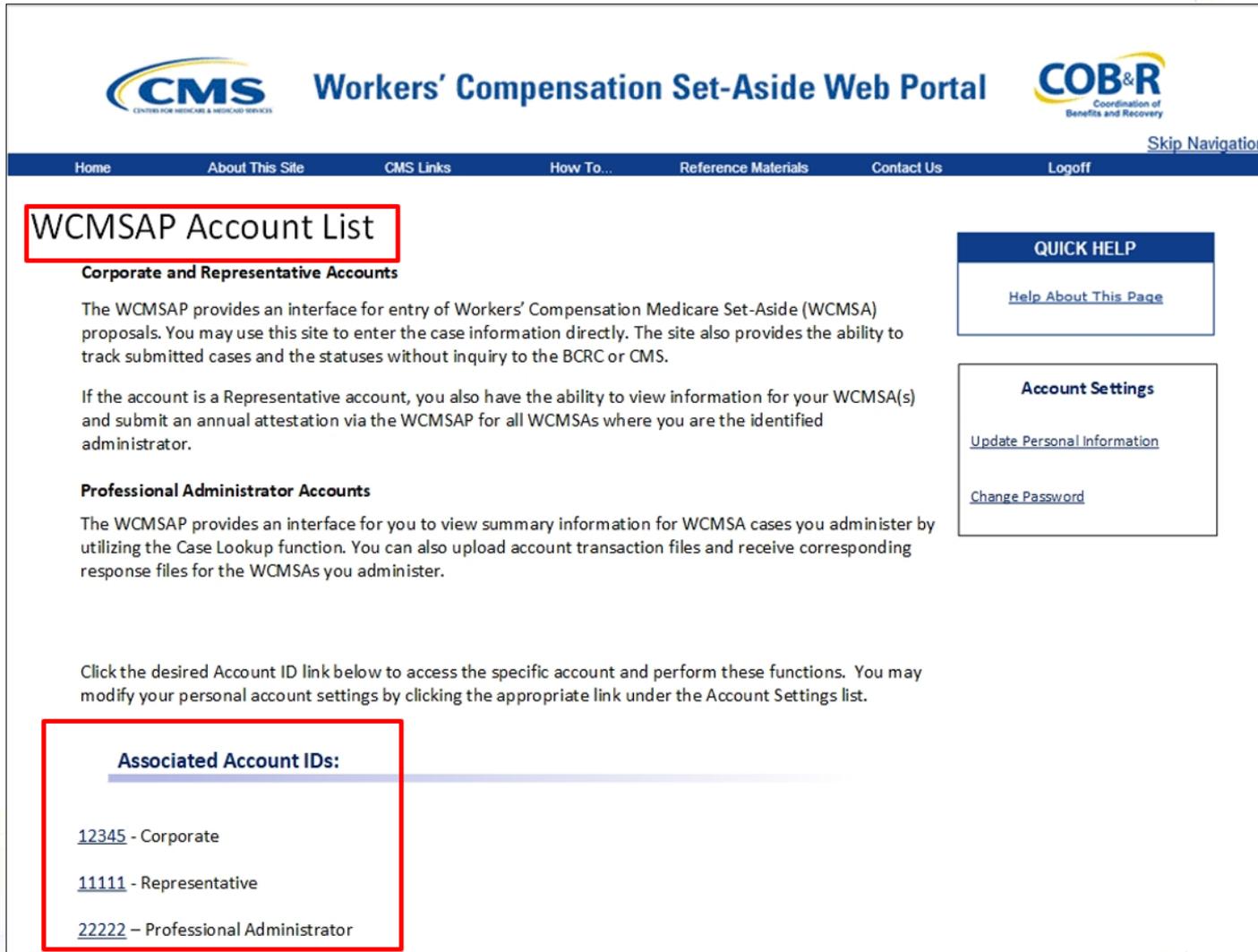
Account Setup

Upon receipt of the mailed Account ID and PIN, the Account Representative will be instructed to have the appropriate Account Manager return to the Workers' Compensation Medicare Set-Aside Web site to complete the account setup. The Account Manager will need to enter the Account ID and PIN on the Account Setup page to begin setup.

[Workers' Compensation Medicare Set-Aside Welcome Page](#)

Functions of a Professional Administrator

WCMSAP Account List



The screenshot shows the WCMSAP Account List page. At the top, there are logos for CMS (Centers for Medicare & Medicaid Services) and COB&R (Coordination of Benefits and Recovery). The page title is "Workers' Compensation Set-Aside Web Portal". A navigation bar contains links for Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Logoff. A "Skip Navigation" link is also present. The main content area is titled "WCMSAP Account List" (highlighted with a red box). It is divided into three sections: "Corporate and Representative Accounts", "Professional Administrator Accounts", and "Associated Account IDs:" (highlighted with a red box). The "Associated Account IDs:" section lists three account types: "12345 - Corporate", "11111 - Representative", and "22222 - Professional Administrator". On the right side, there are two boxes: "QUICK HELP" with a link "Help About This Page" and "Account Settings" with links "Update Personal Information" and "Change Password".

WCMSAP Account List

Corporate and Representative Accounts

The WCMSAP provides an interface for entry of Workers' Compensation Medicare Set-Aside (WCMSA) proposals. You may use this site to enter the case information directly. The site also provides the ability to track submitted cases and the statuses without inquiry to the BCRC or CMS.

If the account is a Representative account, you also have the ability to view information for your WCMSA(s) and submit an annual attestation via the WCMSAP for all WCMSAs where you are the identified administrator.

Professional Administrator Accounts

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

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

Associated Account IDs:

- [12345](#) - Corporate
- [11111](#) - Representative
- [22222](#) - Professional Administrator

QUICK HELP

- [Help About This Page](#)

Account Settings

- [Update Personal Information](#)
- [Change Password](#)

WCMSAP Account List (2)



Workers' Compensation Set-Aside Web Portal



Skip Navigation

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

WCMSAP Account List

Corporate and Representative Accounts

The WCMSAP provides an interface for entry of Workers' Compensation Medicare Set-Aside (WCMSA) proposals. You may use this site to enter the case information directly. The site also provides the ability to track submitted cases and the statuses without inquiry to the BCRC or CMS.

If the account is a Representative account, you also have the ability to view information for your WCMSA(s) and submit an annual attestation via the WCMSAP for all WCMSAs where you are the identified administrator.

Professional Administrator Accounts

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

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

Associated Account IDs:

- [12345 - Corporate](#)
- [11111 - Representative](#)
- [22222 - Professional Administrator](#)

QUICK HELP

[Help About This Page](#)

Account Settings

[Update Personal Information](#)

[Change Password](#)



WCMSAP Home Page

CMS Workers' Compensation Set-Aside Web Portal **COB&R** Coordination of Benefits and Recovery

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

WCMSAP

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

You may modify Account Settings by clicking the appropriate link under the Account Settings list.

QUICK HELP

[Help About This Page](#)

Account Settings

[Update Account Information](#)

[Designee Maintenance](#)

[Account Activity](#)

I'd like to...

- [Case Lookup](#)
- [Request Case Access](#)
- [Upload File](#)
- [Download Response File](#)

New Case Request

New Case Request Options:

- Associate cases to your Login ID
- Upload Settlement Documents for approved cases



The screenshot shows the CMS Workers' Compensation Set-Aside Web Portal. On the left, a sidebar menu titled "I'd like to..." contains links for "Case Lookup", "Request Case Access", "Upload File", and "Download Response File". A red arrow points from "Request Case Access" to the "New Case Request" link in the main navigation bar. The main content area features the CMS logo, the portal title, and a navigation bar with links for Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Logoff. A "QUICK HELP" box with a "Help About This Page" link is also present. The main form area contains a validation notice, instructions for entering data, and a note that an asterisk (*) indicates a required field. The form fields include: Worker's Compensation Case Control Number*, Beneficiary Medicare ID* OR Beneficiary SSN* (with separate boxes for SSN), Beneficiary Last Name* (at least first 5 letters), Beneficiary Date of Birth* (MM/DD/CCYY), and Date of Incident* (MM/DD/CCYY). At the bottom, there are buttons for "Continue", "Cancel", and "Upload Documentation".

New Case Request Confirmation



New Case Request Confirmation

QUICK HELP

[Help About This Page](#)

You have successfully associated the case listed below to your account. Summary information for this case can now be viewed. Click Continue to return to the New Case Request page.

Worker's Compensation Case Control Number: WC1234567890113

Beneficiary Medicare ID: 123456A121

Beneficiary Last Name: Smith

Beneficiary Date of Birth: 11/12/1978

Date of Incident: 11/01/2001

Continue

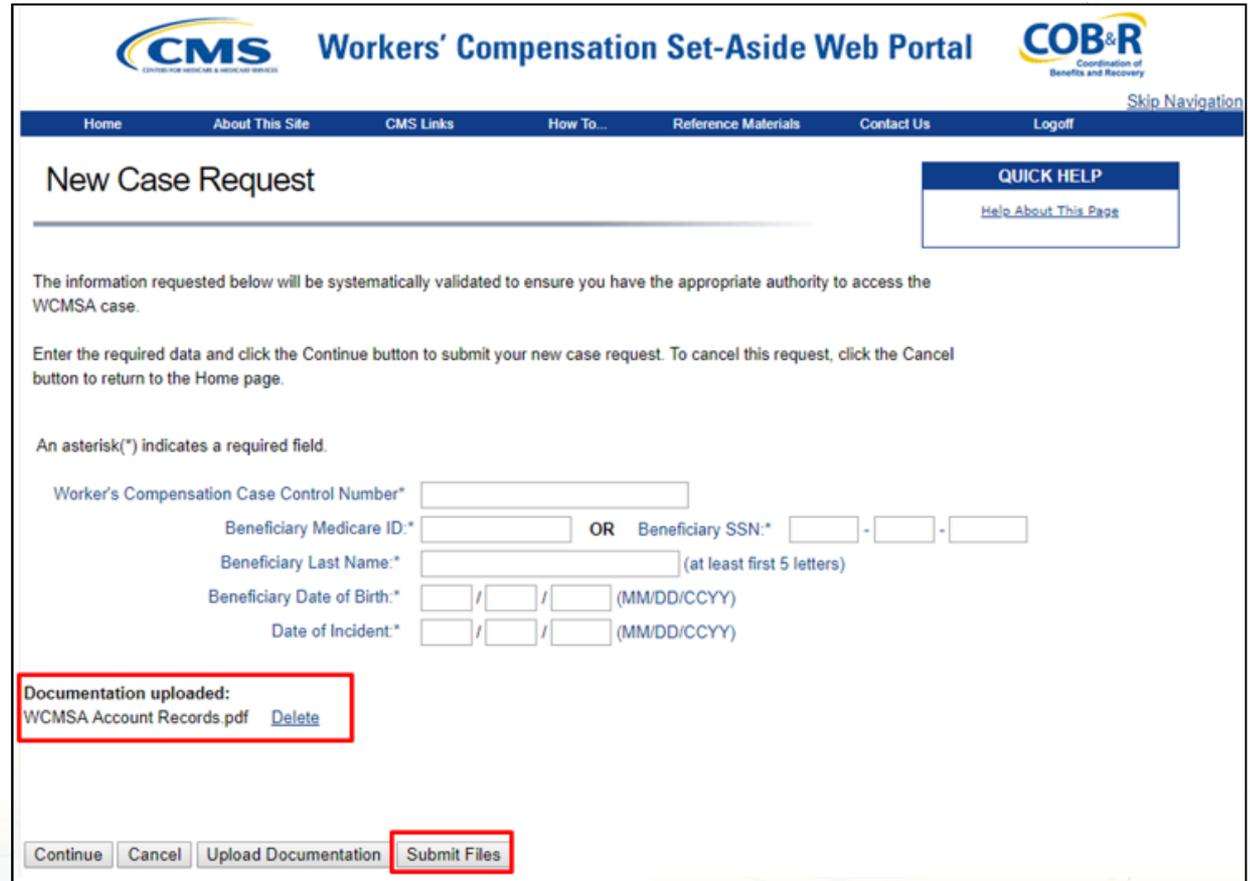
New Case Request – Upload Documentation

- Upload Documentation button will be active when the case requested has been previously approved, but documentation has not yet been received.
- Continue button will be disabled when Upload Documentation is active.

The screenshot shows the 'New Case Request' page on the CMS Workers' Compensation Set-Aside Web Portal. The page includes a navigation bar with links for Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Logoff. A 'QUICK HELP' button is located in the top right corner. The main content area contains instructions for submitting a new case request, including a note that an asterisk (*) indicates a required field. The form fields are: Worker's Compensation Case Control Number* (text input), Beneficiary Medicare ID.* (text input) OR Beneficiary SSN.* (text input with dashes), Beneficiary Last Name.* (text input, at least first 5 letters), Beneficiary Date of Birth.* (MM/DD/CCYY), and Date of Incident.* (MM/DD/CCYY). At the bottom of the form, there are three buttons: 'Continue', 'Cancel', and 'Upload Documentation'. The 'Upload Documentation' button is highlighted with a red box.

New Case Request – Submit Files

- Uploaded document name will appear with the option to “Delete” the file.
- Submit Files button will be displayed to submit the documentation.



The screenshot shows the 'New Case Request' page of the Workers' Compensation Set-Aside Web Portal. The page includes a navigation bar with links for Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Logoff. A 'QUICK HELP' button is located in the top right corner, with a link to 'Help About This Page'.

The main content area contains the following text and form fields:

The information requested below will be systematically validated to ensure you have the appropriate authority to access the WCMSA case.

Enter the required data and click the Continue button to submit your new case request. To cancel this request, click the Cancel button to return to the Home page.

An asterisk(*) indicates a required field.

Worker's Compensation Case Control Number*

Beneficiary Medicare ID.* OR Beneficiary SSN.* - -

Beneficiary Last Name.* (at least first 5 letters)

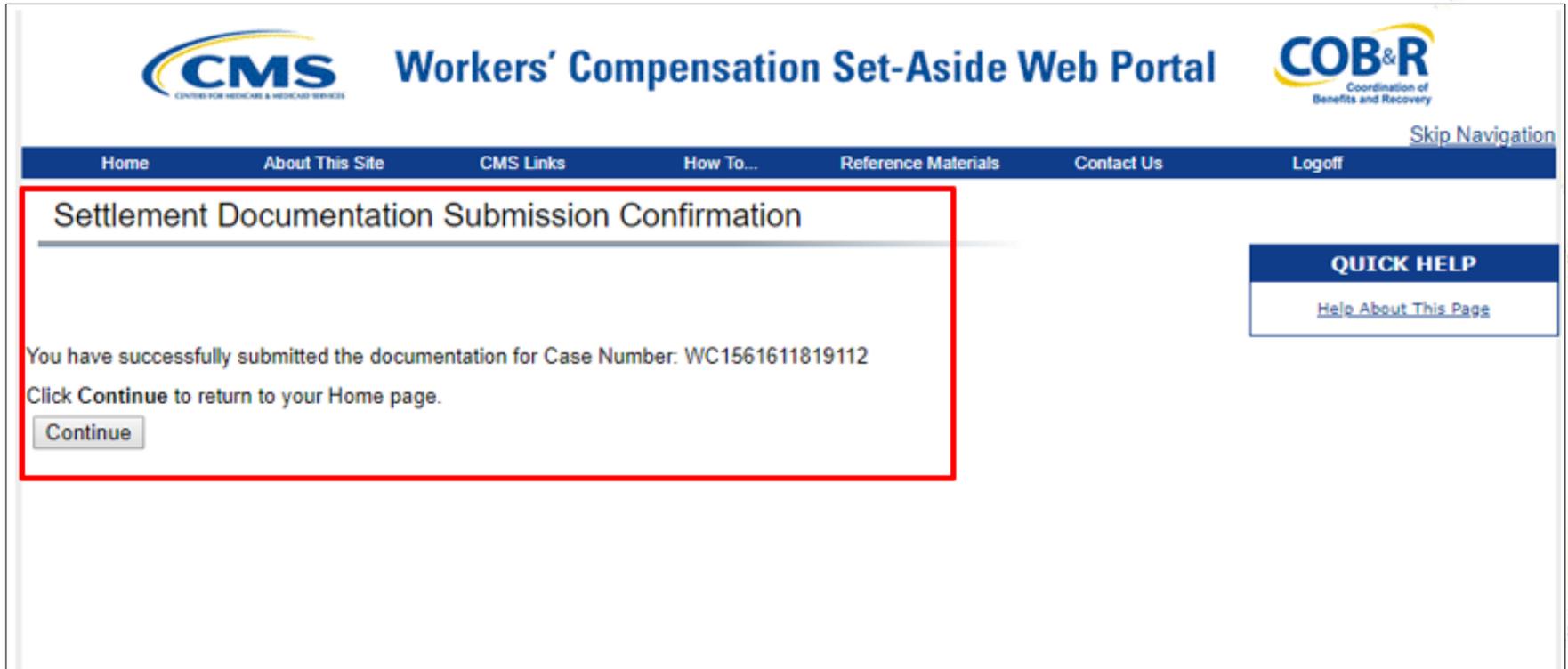
Beneficiary Date of Birth.* / / (MM/DD/CCYY)

Date of Incident.* / / (MM/DD/CCYY)

Documentation uploaded:
WCMSA Account Records.pdf [Delete](#)

At the bottom of the page, there are five buttons: Continue, Cancel, Upload Documentation, and **Submit Files** (highlighted with a red box).

Settlement Documentation Submission Confirmation



The screenshot displays the 'Workers' Compensation Set-Aside Web Portal' interface. At the top left is the CMS logo (Centers for Medicare & Medicaid Services). The main title is 'Workers' Compensation Set-Aside Web Portal'. On the top right is the COB&R logo (Coordination of Benefits and Recovery) and a 'Skip Navigation' link. A dark blue navigation bar contains the following links: Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Logoff. The main content area features a red-bordered box containing the following text: 'Settlement Documentation Submission Confirmation' (underlined), 'You have successfully submitted the documentation for Case Number: WC1561611819112', and 'Click Continue to return to your Home page.' Below this text is a 'Continue' button. To the right of the main content area is a 'QUICK HELP' section with a 'Help About This Page' link.

WCMSA Case Lookup

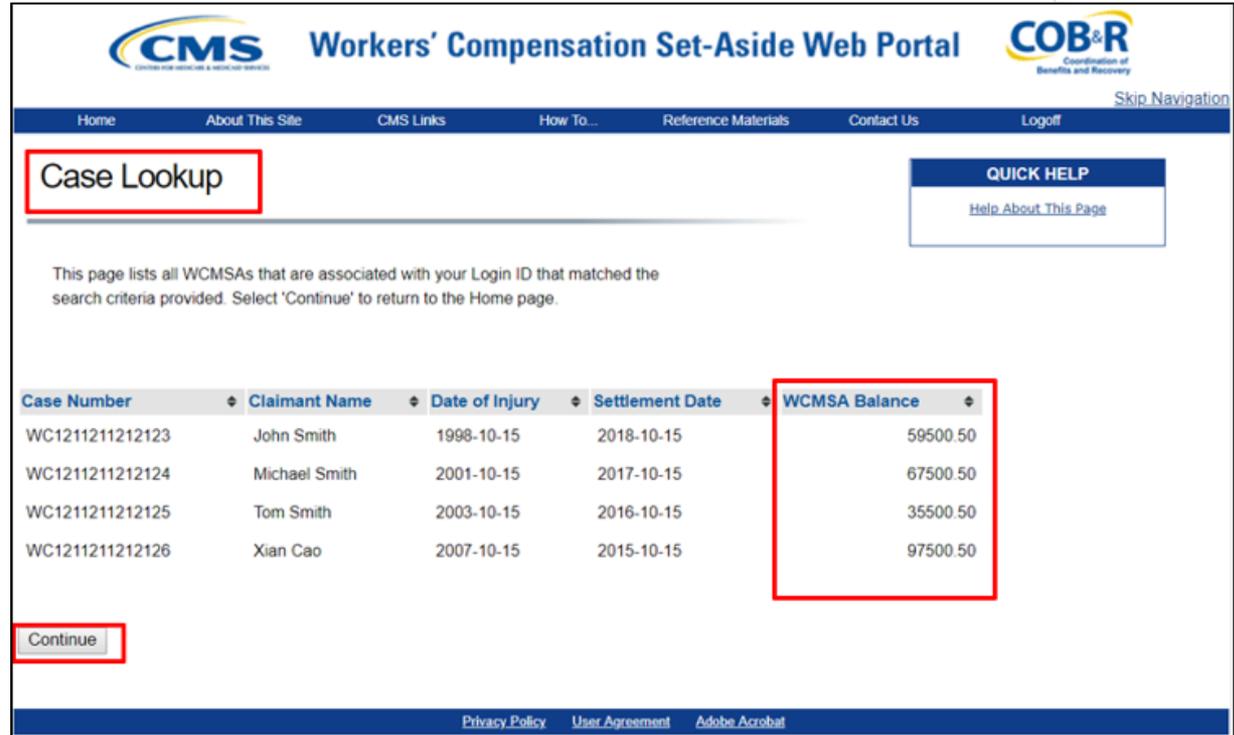
Enter the following:

- Case Control #, Medicare ID or SSN
- Settlement Date Range

The screenshot shows the 'Workers' Compensation Set-Aside Web Portal' with the 'COB&R' logo. A navigation bar includes links for Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Logoff. The main heading 'WCMSA Case Lookup' is highlighted with a red box. A 'QUICK HELP' button with the text 'Hello About This Page' is visible. The instructions state: 'You can access Workers' Compensation Medicare Set-Aside (WCMSA) cases that are associated with your Login ID using various search criteria. Enter the search criteria in the provided fields and click 'Search.' Selecting 'Cancel' will return you to the Home page.' The search fields are also highlighted with a red box and include: 'Enter one of the following:', 'Case Control Number: [input]', 'Medicare ID: [input] OR SSN: [input]-[input]-[input]', and 'Date Range: Settlement Date Range: From Date [input]/[input]/[input] To Date: [input]/[input]/[input]'. At the bottom are 'Cancel' and 'Search' buttons.

Case Lookup Results

- WCMOSA Balance will be displayed on this page but can only be viewed by users who have requested access to the case and have been approved.



The screenshot shows the 'Workers' Compensation Set-Aside Web Portal' interface. At the top, there are logos for CMS and COB&R, and a navigation bar with links: Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, Logoff, and Skip Navigation. A 'Case Lookup' button is highlighted with a red box. Below it, a 'QUICK HELP' box contains a link to 'Help About This Page'. The main content area displays a message: 'This page lists all WCMSAs that are associated with your Login ID that matched the search criteria provided. Select 'Continue' to return to the Home page.' Below this message is a table with the following data:

| Case Number | Claimant Name | Date of Injury | Settlement Date | WCMOSA Balance |
|-----------------|---------------|----------------|-----------------|----------------|
| WC1211211212123 | John Smith | 1998-10-15 | 2018-10-15 | 59500.50 |
| WC1211211212124 | Michael Smith | 2001-10-15 | 2017-10-15 | 67500.50 |
| WC1211211212125 | Tom Smith | 2003-10-15 | 2016-10-15 | 35500.50 |
| WC1211211212126 | Xian Cao | 2007-10-15 | 2015-10-15 | 97500.50 |

The 'WCMOSA Balance' column is highlighted with a red box. At the bottom left of the table area, a 'Continue' button is highlighted with a red box. The footer of the page contains links for Privacy Policy, User Agreement, and Adobe Acrobat.

WCMSA File Upload

- Files must be in .csv format

COB&R Workers' Compensation Set-Aside Web Portal

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

WCMSA File Upload

Click Browse to select your file. Click Continue to upload that file. Click Cancel to return to the Home page without uploading a file.

Please Note: The file must be in .csv (plain text comma separated values format) and the upload file cannot exceed 40 MB.

*Required
 File to Upload:* No file chosen

Files Previously Uploaded

| File Name | Upload Date | User ID |
|--------------------|-------------|---------|
| WCMSA_20190531.csv | 05/31/2019 | AAAAAA |
| WCMSA_20190515.csv | 05/15/2019 | AAAAAA |
| WCMSA_20190430.csv | 04/30/2019 | BBBBBB |
| WCMSA_20190415.csv | 04/15/2019 | AAAAAA |
| WCMSA_20190331.csv | 03/31/2019 | AAAAAA |
| WCMSA_20190315.csv | 03/15/2019 | AAAAAA |
| WCMSA_20190228.csv | 02/28/2019 | AAAAAA |
| WCMSA_20190215.csv | 02/15/2019 | AAAAAA |
| WCMSA_20190131.csv | 01/31/2019 | BBBBBB |
| WCMSA_20190115.csv | 01/15/2019 | AAAAAA |

File Layouts

- File Layouts and Error Codes can be found in the WCMSAP User Guide, Appendix B.
- The Input File must include the opening balance upon submission (See Transaction Type).

WCMSAP User Guide Appendix B: File Layouts and Error Codes

Appendix B: File Layouts and Error Codes

Table B-1: Professional Administrator Transaction File Layout

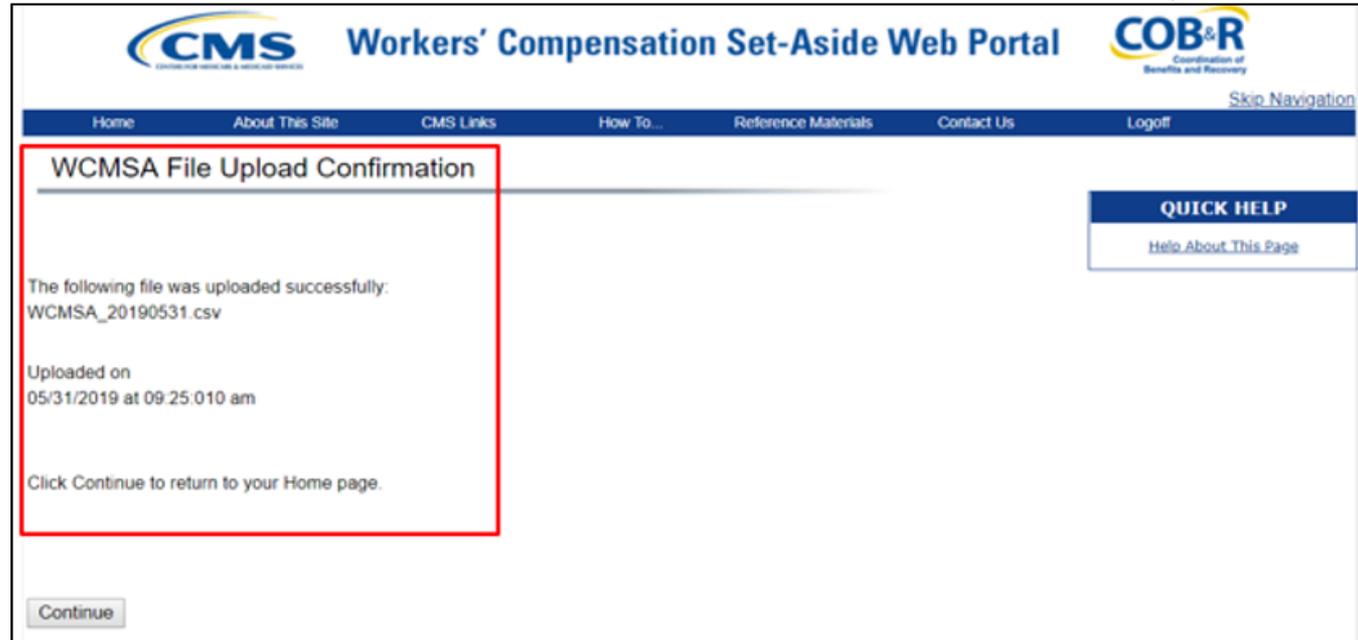
| Field # | Field Name & Description | Format | Max Length | Field Required | Values/Requirements |
|---------|--|---------|------------|---|---|
| 1 | Account ID Professional Administrator Account ID | Numeric | 9 | Yes | Must match the Account ID of Professional Administrator account the file is uploaded from. |
| 2 | DCN Document Control Number assigned by the Professional Administrator | Text | 15 | Yes | Each Add record for the Account ID must have a unique DCN. |
| 3 | ACTION Indicates the action the system is to take with the record – Add or Delete | Numeric | 1 | Yes | Valid values: 0 = Add 1 = Delete (not allowed when previously submitted transaction requesting to be deleted has Transaction Type '1' or '6') |
| 4 | Case ID Workers' Compensation Case Control Number | Text | 15 | Yes | Must match an existing ID and be administered by the Professional Administrator associated with the submitted Account ID. |
| 5 | Medicare ID Beneficiary's Medicare ID (HICN OR MBI) | Text | 12 | Conditional Required if SSN not provided | When provided must be associated with the submitted Account ID. |
| 6 | SSN Beneficiary's Social Security Number | Numeric | 9 | Conditional Required if Medicare ID not provided | When provided must be associated with the submitted Account ID. Note: If both SSN and Medicare ID submitted, the SSN will be used. |
| 7 | Transaction Type Indicates if the transaction is an expense or a deposit | Numeric | 1 | Yes <i>Not required when Action = 1 - Delete</i> | Valid Values: 1 - Beginning Balance 2 - Interest Earned 3 - Medical/RX Expense 4 - Taxes Paid on Interest 5 - Annual WCMSA Funds Exhausted 6 - WCMSA Funds Completely Exhausted |

1 – Beginning Balance
2 – Interest Earned
3 – Medical/RX Expense
4 – Taxes Paid on Interest
5 – Annual WCMSA Funds Exhausted
6 – WCMSA Funds Completely Exhausted



WCMSA File Upload Confirmation

- File name will appear, showing it was uploaded successfully.
- Date and time of upload will appear.
- Click Continue to your Home page.



WCMSA Response File Download

- Click on the file name to download the file.
- Files are available for one year if number of files does not exceed 500 files.
- Note: If you upload a large number of files and want to keep them for longer than one year, you will need to save an electronic copy for future reference.



I'd like to...

- [Case Lookup](#)
- [Request Case Access](#)
- [Upload File](#)
- [Download Response File](#)

Workers' Compensation Set-Aside Web Portal

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

WCMSA Response File Download

WCMSA Response File Download Below are the response files available for download. To download a file, click on the file name. These files shall be available for one year (up to 500 files). Click Continue to return to the Home page.

Files Available for Download

| File Name | Upload Date | User ID |
|------------------------------------|-------------|---------|
| WCMSA_20190511.csv | 05/31/2019 | AAAAAA |
| WCMSA_20190515.csv | 05/15/2019 | AAAAAA |
| WCMSA_20190430.csv | 04/30/2019 | BBBBBB |
| WCMSA_20190415.csv | 04/15/2019 | AAAAAA |
| WCMSA_20190331.csv | 03/31/2019 | AAAAAA |
| WCMSA_20190315.csv | 03/15/2019 | AAAAAA |
| WCMSA_20190228.csv | 02/28/2019 | AAAAAA |
| WCMSA_20190215.csv | 02/15/2019 | AAAAAA |
| WCMSA_20190131.csv | 01/31/2019 | BBBBBB |
| WCMSA_20190115.csv | 01/15/2019 | AAAAAA |

Continue

Privacy Policy User Agreement Adobe Acrobat

Response File Layout/Error Codes

- The Professional Administrator Response File Layout table can be used to identify each field in your response file and also provides a description of that field.
- The Professional Administrator Response File Error Codes table can be used to identify the corresponding field and description of the error that caused your file to not be processed.

Table B-2: Professional Administrator Response File Layout

| Field # | Field Name | Format | Max Length | Description / Value |
|---------|------------|---------|------------|---|
| 1 | Account ID | Numeric | 9 | Professional Administrator Account ID submitted on the Input file. |
| 2 | DCN | Text | 15 | DCN assigned by the Professional Administrator submitted on the input file. |
| 3 | Action | Numeric | 1 | Action submitted on the input file. |
| 4 | Case ID | Text | 15 | Workers' Compensation Case Control ID submitted on the input file. |

Table B-3: Professional Administrator Response File Error Codes

| Error Code | Related Field | Error Description |
|------------|----------------------|--|
| R01 | Account ID (Field 1) | Invalid Account ID <ul style="list-style-type: none"> • The Account ID on the transaction does not match the Professional Administrator Account ID the file was submitted from, or • The Account ID is missing from transaction record, or • The Account ID is not numeric |
| R02 | DCN (Field 2) | Invalid DCN <ul style="list-style-type: none"> • The DCN is missing from the transaction record • The Action Code on the record is not = '1' – Delete and the DCN matches the DCN on a previously accepted record for the Case. |
| R03 | Action (Field 3) | Invalid Action <ul style="list-style-type: none"> • Action is missing from the transaction record, or • The Action is not equal to '0' or '1' |
| R04 | Case ID (Field 4) | Missing Case ID <ul style="list-style-type: none"> • Case ID is missing from the transaction record |
| R05 | Case ID (Field 4) | Administrator not associated to Case <ul style="list-style-type: none"> • The EIN of the case Administrator does not match the EIN of the Professional Administrator Account that submitted the transaction |

Updated Functions for Corporate Users

Case Information (Corp)

- New tab, “WCMSA Administrator” will be displayed.
- Administrator Type is a required field as indicated by the asterisk.
- Default option is “Self.”

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

Case Information

Beneficiary/Claimant * **WCMSA Administrator *** Diagnosis Codes * 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.

QUICK HELP
[Help About This Page](#)

*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.

Administrator Type:*
 Self Rep Payee Professional Administrator

Name:
 Address Line 1:
 Address Line 2:
 City:
 State:
 Zip Code: -
 Phone: - -
 Fax: - -
 E-mail Address:

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

Privacy Policy User Agreement Adobe Acrobat

Self-Admin: Medicare beneficiary who is administering on their own behalf.

Case Information (Corp) (2)

- Rep Payee:
For non-
corporate
entities who
are
administering
on behalf of a
beneficiary.

Administrator Type:*

Self Rep Payee Professional Administrator

Name:*

Address Line 1:*

Address Line 2:*

City:*

State:* Maryland ▼

Zip Code:* -

Phone:* - -

Fax: - -

E-mail Address:*

Re-enter E-mail Address:

Case Information (Corp) (3)

- Prof. Admin: A professional entity will administer and account for the WCMSA that was established to protect Medicare's interests.
- This requires a copy of the Prof. Admin Agreement before the case can be submitted.

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:

Case Documents

- Set-Aside Administrator or Copy of Agreement will be required for new cases whose admin type is marked as a Professional Administrator.

Case Information

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

Documents * Summary

Case Documents

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). Medical records must be separated into files that contain less than 100 pages. Please create separate files BEFORE attaching these files.

QUICK HELP

[Help About This Page](#)

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](#)

20 - Life Care Plan *

[Add Files](#)

25 - Proposed/Final Settlement Agreement or Proposed or Court Ordered *

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

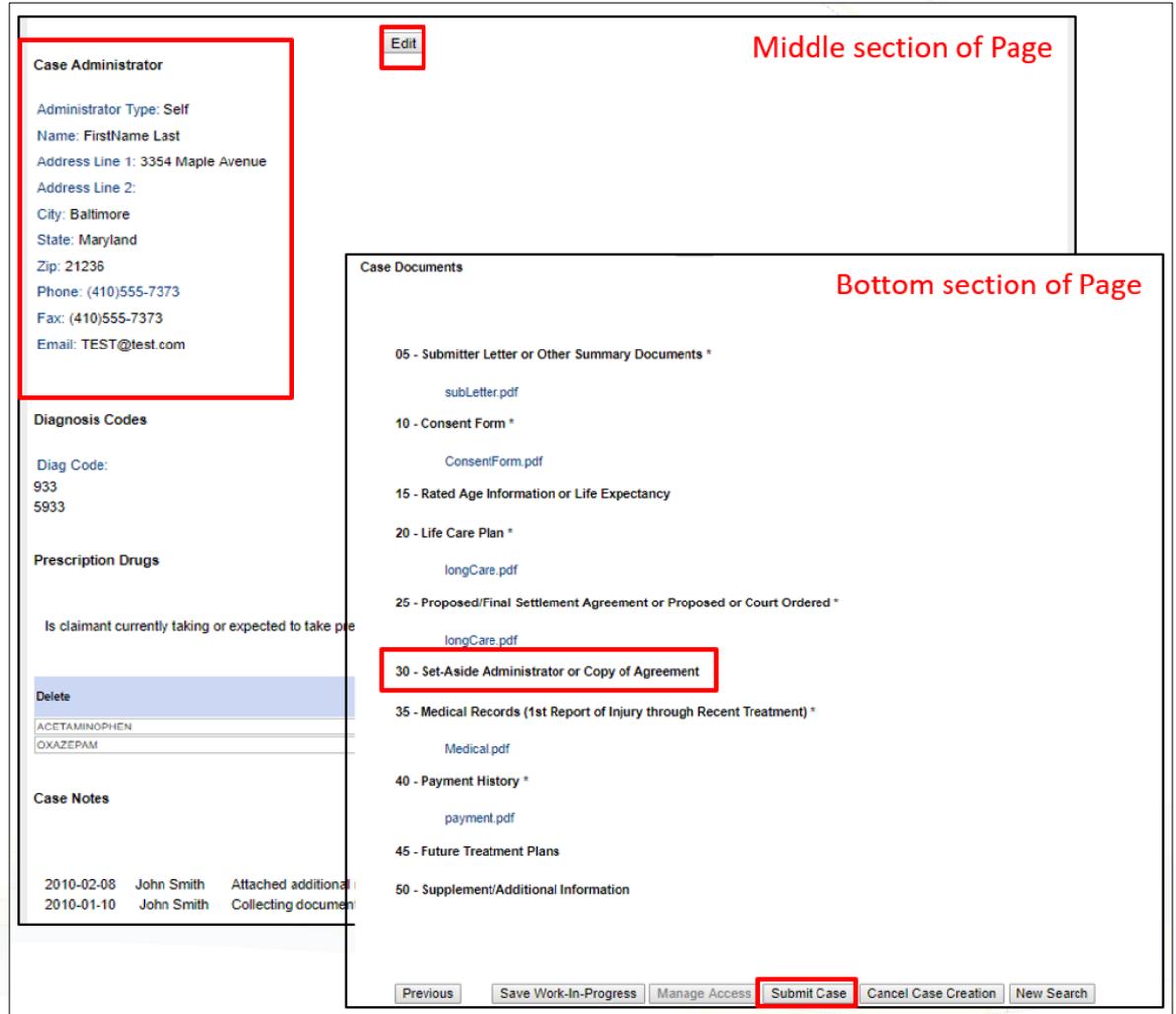
[Add Files](#)

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

[Add Files](#)

Case Summary Cont. (Corp)

- Use the Edit button to make changes if needed.
- Document Type 30 has been added to the Case Documents section.
- An indicator has been added and will appear if the Administrator Type is Professional Administrator and the document type 30 was not added.
- Click Submit Case once you have verified all information is correct.



The screenshot shows a web form for a Case Summary. The form is divided into several sections:

- Case Administrator:** A red box highlights this section, which includes fields for Administrator Type, Name, Address, City, State, Zip, Phone, Fax, and Email. An **Edit** button is located to the right of this section.
- Diagnosis Codes:** A section for entering diagnosis codes.
- Prescription Drugs:** A section for listing prescription drugs.
- Case Notes:** A table with columns for Date, Name, and Description.
- Case Documents:** A section listing various document types and their corresponding PDF files. A red box highlights document type **30 - Set-Aside Administrator or Copy of Agreement**.

At the bottom of the form, there are several buttons: **Previous**, **Save Work-In-Progress**, **Manage Access**, **Submit Case** (highlighted with a red box), **Cancel Case Creation**, and **New Search**.

Annotations on the screenshot include:

- Middle section of Page:** A red label pointing to the Case Administrator section.
- Bottom section of Page:** A red label pointing to the Case Documents section.

Additional Resources

- [WCMSAP User Manual](#)
- [WCMSAP Training Materials](#)
- EDI Department: 1-646-458-6740
- Email: msspcentral@cms.hhs.gov

Questions & Answers



Slide 1: Workers' Compensation Attestation Enhancement Webinar for Corporate Users and Professional Administrators

Welcome to the Workers' Compensation Attestation Enhancement Webinar for Corporate Users and Professional Administrators.

Slide 2: Presentation Topics

Throughout this presentation, we will look at the background information, purpose of the enhancement, how to register as a Professional Administrator, new functionality and additional resources.

Slide 3: Background Information

Today, each year, no later than 30 days after the anniversary date of the Workers' Compensation settlement, you must send an attestation to Medicare's Benefits Coordination & Recovery Center (BCRC) stating that you have used the funds in the account correctly. In the past, transactions regarding Workers' Compensation Medicare Set-Aside (WCMSA) accounts, including annual attestations, had to be completed using U.S. Mail.

Slide 4: Purpose of Enhancement

The purpose of this enhancement is to add functionality to allow Professional Administrators to register accounts on the Workers' Compensation Medicare Set-Aside Portal (WCMSAP) as well as functionality to allow Professional Administrators to submit files of account transactions and view account balance information related to WCMSA accounts for which they administer. This eliminates the need to submit information on WCMSAs via U.S. Mail, but mailing is still an option if preferred.

Slide 5: Registering as a Professional Administrator

We will begin by looking at the process of registering as a Professional Administrator.

In order to use the WCMSAP, Professional Administrators will be required to complete a two-step process: Registration and Account Setup.

Registration will be completed by the company's named Account Representative. This is the individual in the organization who has the legal authority to bind the organization to a contract and the terms of WCMSAP requirements and processing. The Account Representative will complete the initial step in the registration process, but will not be provided with a Login ID.

Account Setup will be performed by the company's named Account Manager. The Account Manager will control the administration of the Professional Administrator account. They may also invite other company employees or data processing agents to assist.

Slide 6: Registering as a Professional Administrator (2)

Entities who wish to use the WCMSAP as a Professional Administrator are required to create a new WCMSAP account. This means an Account Representative (AR) will have to be named and perform the initial registration steps and invite an individual Account Manager to complete the Account Setup.

The Account Manager can then invite Account Designees. After the account has been set up, the Account Manager or Account Designee for the account can request case access for each case they have authority to administer and are required to provide the current/opening balance for all existing WCMSAs they want to administer on the WCMSAP before transaction records will be accepted for the case.

Note: Professional Administrators will only need to provide the opening balance for cases that were set up prior to this enhancement that they wish to submit transaction records for in order to no longer have to submit a paper attestation.

Slide 7: Login Warning Page

Anytime you access WCMSAP, the Login Warning page will appear, and you will need to click “I Accept” to continue to the Welcome Page.

Slide 8: Welcome to WCMSAP

From the Welcome to the WCMSAP page, you will be able to register for your Professional Administrator account by clicking the New Registration link.

Note: As noted previously registering for an account is a two-step process, the user will come back to this page to complete Step 2: Account Setup. Users will return to the Welcome page to login once account setup is completed.

Slide 9: Select Account Type

Next, the Select Account Type page will appear. You will need to select the radio button for Professional Administrator and then click next. You will notice the statement associated with the selection that indicates the entity is registering with an Employee Identification Number (EIN) and will be the responsible party for administering MSA funds and reporting to Medicare.

Note: Users can use the Quick Help - Help About This Page link to get more information about each page and the fields within that page.

Slide 10: Professional Administrator Information

You will then see the Professional Administrator Information page. All information with an asterisk is required and will need to be completed before clicking the next button to proceed to enter your Account Representative information.

Slide 11: Account Representative (AR) Information

The Account Representative Information page will appear. Again, all information with an asterisk is a required field and must be completed before continuing. Click Next to continue.

Slide 12: Registration Summary

You now can review all the information you have entered on the Registration Summary page. Use the Edit buttons next to each section to make corrections and submit your Registration for a Professional Administrator Account.

Slide 13: Thank You

When a registration application is submitted, the information provided will be validated by the Benefits Coordination and Recovery Center (BCRC). Once this is completed, the BCRC will send a letter via the US Postal Service to the named Authorized Representative with an Account ID and personal identification number (PIN). Your Account Representative should receive the PIN letter within 10 business days after the New Registration step is completed. The Account Manager will then use this information to complete your account setup. The Account Manager or any authorized Account Designees will then be able to access your account. Use the link at the bottom of the page to return to the Welcome page.

Note: For more information on Account Setup, please see the Corporate/Professional Administrator Account Setup training on CMS.gov.

Slide 14: Functions of a Professional Administrator

Next, we will look at the functions a Professional Administrator has by accessing your Account ID.

Slide 15: WCMSAP Account List

After accessing your account from the Account List page, you will now see your associated account ID for your Professional Administrator account listed on the Account List page.

Slide 16: WCMSAP Account List (2)

Let's look at your options/functions under your account ID. "The WCMSAP provides an interface for you to view summary information for WCMSA cases you administer by utilizing the Case Lookup function. You can also upload account transaction files and receive corresponding response files for the WCMSAs you administer." Let's go ahead and look at the Account ID link for your Professional Administrator Account.

Slide 17: WCMSAP Home Page

As a Professional Administrator, you will be able to perform a Case Lookup, Request case access, upload transaction files and download response files. Let's look at each of the options beginning with Requesting Case Access.

Slide 18: New Case Request

The Request Case Access will allow you to associate cases with your Login ID if the Employee Identification Number (EIN) for the Administrator of the case matches the EIN of the Professional Administrator account from which you are requesting access to the case. This will allow you to view the current balance of the case in the WCMSAP in order to reconcile their accounts. For the New Case Request, enter all required data and click continue.

Slide 19: New Case Request Confirmation

The information entered will appear on the New Case Request Confirmation page showing that you have successfully associated the case to your account. Click Continue to return to New Case Request page.

Slide 20: New Case Request – Upload Documentation

When final settlement documentation has not been received, you will not be able to perform a new case request until this information has been provided and validated. You may use the Upload Documentation button to perform this action. The Upload Documentation button will only appear if the case requested has been previously approved, but the settlement documentation has not been received yet. When the Upload Documentation button is active, the Continue button will be disabled.

Slide 21: New Case Request – Submit Files

Once the documents are uploaded, they will now appear on the New Case Request page with a Delete link to the file/document if you wish to make changes or have chosen the incorrect file name. Otherwise, click the Submit Files button to submit the file(s).

Slide 22: Settlement Documentation Submission Confirmation

The Settlement Documentation Submission Confirmation page will be displayed to confirm that your document was successfully submitted for the indicated WCMSA case number. Once the documentation has been validated, you will be able to perform the new case request to associate the case to your Account ID. Click Continue to return to the Home page.

Slide 23: WCMSA Case Lookup

The Case Lookup page allows you to search for cases associated with your login ID in order to view the current balance of the case. Enter the Case Control Number, the Medicare ID, or SSN and click search.

Note: The Settlement Date Range fields are for potential future use only.

Slide 24: Case Lookup Results

The Case Lookup page will return a set of results that match the criteria entered. This page will display the WCMSA for each case where the request case access function has been successfully performed. Click Continue to return to the Home page. Note: It is possible that the search criteria may return multiple results for an individual claimant.

Slide 25: WCMSA File Upload

Moving on to the Upload File link, this option will allow Professional Administrators to upload transaction files in .csv format. You access this page by clicking the Upload File link on your home page, located at the top left corner of this slide. You will use the Choose File button to enter the file name or browse your PC for the file. Once the file has been located, you can click Continue to upload the file.

Note: PAs will also be able to see a list of previously uploaded files in the table on this page.

Slide 26: File Layouts

For assistance with creating the input file, please see the Professional Administrator Transaction File Layout in Appendix B in the WCMSAP User Guide. The Transaction Types that can be submitted are:

- 1 – Beginning Balance
- 2 – Interest Earned
- 3 – Medical/RX Expense
- 4 – Taxes Paid on Interest
- 5 – Annual WCMSA Funds Exhausted
- 6 – WCMSA Funds Completely Exhausted

You will be required to submit the beginning balance for each case that was in process/previously approved prior to Oct 7th.

Slide 27: WCMSA File Upload Confirmation

The File Upload Confirmation page will appear, showing the file was uploaded successfully along with the date and time it was uploaded. Click Continue to return to your Home page.

Slide 28: WCMSA Response File Download

Lastly, the Download Response File option will allow you as the Professional Administrator to download response files created for transaction files you have submitted. To download a file, click on the file name. The table will display the file names of up to the most recent 500 files uploaded for the year, a maximum limit of 500 files will be displayed. If you wish to return to the Home page at any time, click Continue.

Note: If you upload a large number of files and want to keep them for longer than one year, you will need to save an electronic copy for future reference.

Slide 29: Response File Layout/Error Codes

When reviewing your response files, you can again reference the WCMSAP User Guide, Appendix B for the Response File Layout and Error Codes.

Slide 30: Updated Functions for Corporate Users

Finally, we will look at the updated functions for a Corporate user.

Slide 31: Case Information (Corp)

When creating a case through the Create a New Case link, you will now see a new tab for WCMSA Administrator has been added. As part of the new case creation process, you will be 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.

Slide 32: Case Information (Corp) (2)

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

Slide 33: Case Information (Corp) (3)

The Professional Administrator 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 34: Case Documents

You can upload the Set-Aside Administrator or Copy of Agreement on the Documents tab. You will see that the document is marked with an asterisk indicating that it is required. Click the Add Files link for the Set-Aside Administrator or Copy of Agreement to add the required document. You will not be able to submit the case until this document and all other required documents have been added.

Slide 35: Case Summary Cont. (Corp)

Once all your information has been entered and your required documents attached, you will continue to the Case Summary Tab to confirm your data. You will see that the Case Administrator section has been added and 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 document type 30 for new case creation if the Administrator Type is Professional Administrator. Once all information has been verified, click the Submit Case button.

Slide 36: Additional Resources

Additional information can be found in the [WCMSAP User Guide](#) which is available in the Resources link in the portal and in the [WCMSAP Training Materials](#) available on CMS.gov. For any issues with your WCMSAP account, contact the EDI Department at 1-646-458-6740.

Slide 37: Questions & Answers

This concludes our presentation. We will now move into the question and answer portion of the webinar.

Acronyms

| | |
|--------|---|
| AD | Account Designee |
| AM | Account Manager |
| AR | Account Representative |
| BCRC | Benefits Coordination & Recovery Center |
| CMS | Centers for Medicare & Medicaid Services |
| EDI | Electronic Data Interchange |
| EIN | Employee Identification Number |
| MSA | Medicare Set-Aside |
| PA | Professional Administrator |
| PIN | Personal Identification Number |
| WCMSAP | Workers' Compensation Medicare Set-Aside Portal |