

# Workers' Compensation Attestation Enhancement Webinar for Self-Administration and Representative Account Users

October 30, 2019

# Presentation Topics

- Background Information
- Purpose of Enhancement
- High Level Summary of Changes
- Functionality for users accessing WCMSAP through MyMedicare.gov
- Functionality for Self and Representative Accounts
- 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, when the WCMSA account had no money left, you were required to send in an attestation letter attesting that the funds had been depleted.

# Purpose of Enhancement

- CMS has identified process improvements to the WCMSA account expenditure tracking and attestation process by adding the electronic option.
- Additionally, although previous WCMSAP functionality did not allow users to access cases that were submitted via mail/CD-ROM, that functionality has been updated and users can now view all cases on the WCMSAP no matter how submitted.

# High Level Summary of Changes

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

Updated Functions for Users  
accessing their information from  
MyMedicare.gov

# Accessing MSA from MyMedicare

1. Log in to MyMedicare.gov to access the Home Page.

The screenshot shows the Medicare.gov MyMedicare home page. At the top, the Medicare.gov logo is on the left, and the user's name 'ANNA SCRIPA' is on the right, along with 'Live Chat', 'Log out', and 'Español' links. Below the header is a navigation bar with 'Home', 'My Claims', 'My Plans & Coverage', and 'My Providers & Services'. The 'Home' link is highlighted with a red box. The main content area is divided into two columns: 'My information' and 'My messages'. The 'My information' section includes 'Current plan' (UnitedHealthcare MedicareComplete Choice Plan 4 (Regional PPO) (R5342 - 006)), 'Coverage starts' (Part A: 09/01/1999, Part B: 09/01/1999), and links for 'View my plans & coverage' and 'Find & compare 2020 plans'. The 'My messages' section includes a notification to 'Get your Medicare Summary Notices (MSNs) electronically', a count of '0 Unread messages', and buttons for 'View All Messages' and 'Go Paperless'. At the bottom, there is a section titled 'What do you want to do?' with three icons representing different services.

# Accessing MSA from MyMedicare (2)

2. Select “My Claims” from the menu to access the MSA case info link.

The screenshot shows the MyMedicare website interface. At the top, there is a navigation bar with 'Home', 'My Claims' (highlighted with a red box), 'My Plans & Coverage', and 'My Providers & Services'. Below the navigation bar, the main content area is titled 'My claims' and includes a 'Print' icon. There are two main action buttons: 'Check my deductible amount' and 'View my electronic Medicare Summary Notices'. A text box below these buttons provides information about Medicare Advantage plans and Original Medicare claims. A 'Search claims' button is located below the text box. Under the 'Accident & injury claims' section, there are two links: 'See MSP case info' and 'See MSA case info' (highlighted with a red box).

# Accessing MSA from MyMedicare (3)

3. Click “I Accept”  
on the Disclaimer  
page.

## Medicare Set Aside (MSA) Cases

The MSA tab contains information regarding accident or injury claims paid by Medicare that may result in your repayment. Please read the information below and click the 'I Accept' button to proceed to the Payment Summary page that lists your case information.

**Disclaimer:** WCMSA amounts are NOT final until Medicare gets final settlement documents. WCMSA amount information posted on MyMedicare.gov is based on CMS getting these settlement documents.

- If you have questions about the information in the MSA Cases or Detail Form, contact your attorney, submitter, or other representative before contacting Medicare. Your attorney, submitter, or other representative should already be handling this for you.
- When your case settles, give Medicare’s contractor a copy of the following at the address listed below:
  - ✓ The dated settlement agreement signed by all parties showing the total amount of the settlement and WCMSA amount(s).
- Please check your MyMedicare account as updates are made regularly.

### WCMSA Proposal/Final Settlement

BCRC-NGHP  
P.O. Box 138899  
Oklahoma City, OK 73113-8899  
1-855-798-2627  
TTY: 1-855-797-2627

# Accessing MSA from MyMedicare (4)

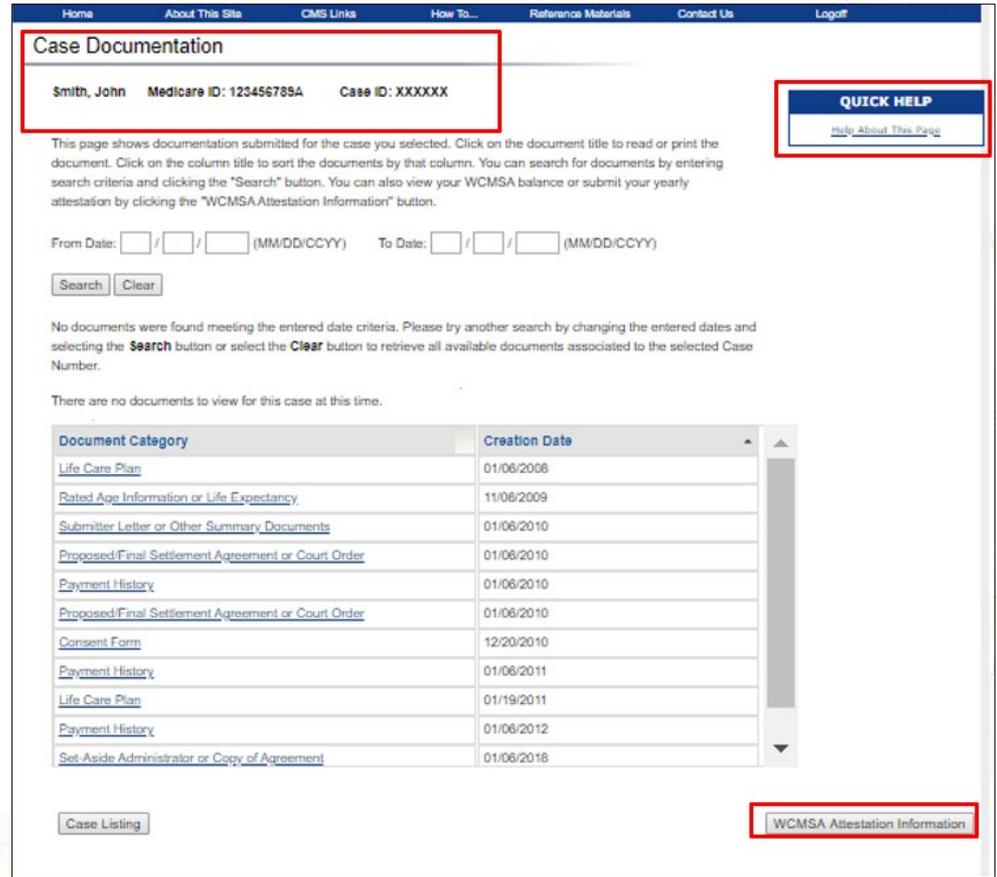
4. Select the WC Case you wish to review.

The screenshot shows the Medicare.gov website interface. At the top, the user is logged in as ANNE SMITH and has access to a Live Chat. The navigation menu includes Home, My Claims (selected), My Plans & Coverage, and My Providers & Services. A notification banner indicates that the user may need to adjust their browser's pop-up blocker settings. The main heading is "Medicare Set Aside (MSA) Cases". Below this, a table lists the user's Workers Compensation cases. The table has columns for Case ID, Case Type, and Date of Incident. The first and only entry is highlighted with a red box: Case ID WC1924200046560, Case Type Worker's Compensation, and Date of Incident 01/01/2019. There are also sorting options for the table, set to "Date of Incident" and "Descending".

Case ID	Case Type	Date of Incident
WC1924200046560	Worker's Compensation	01/01/2019

# Case Documentation (MyMedicare)

- 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
- Use the “WCMSA Attestation Information” button to view your WCMSA balance or submit your yearly attestation if you are the identified administrator
- 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.

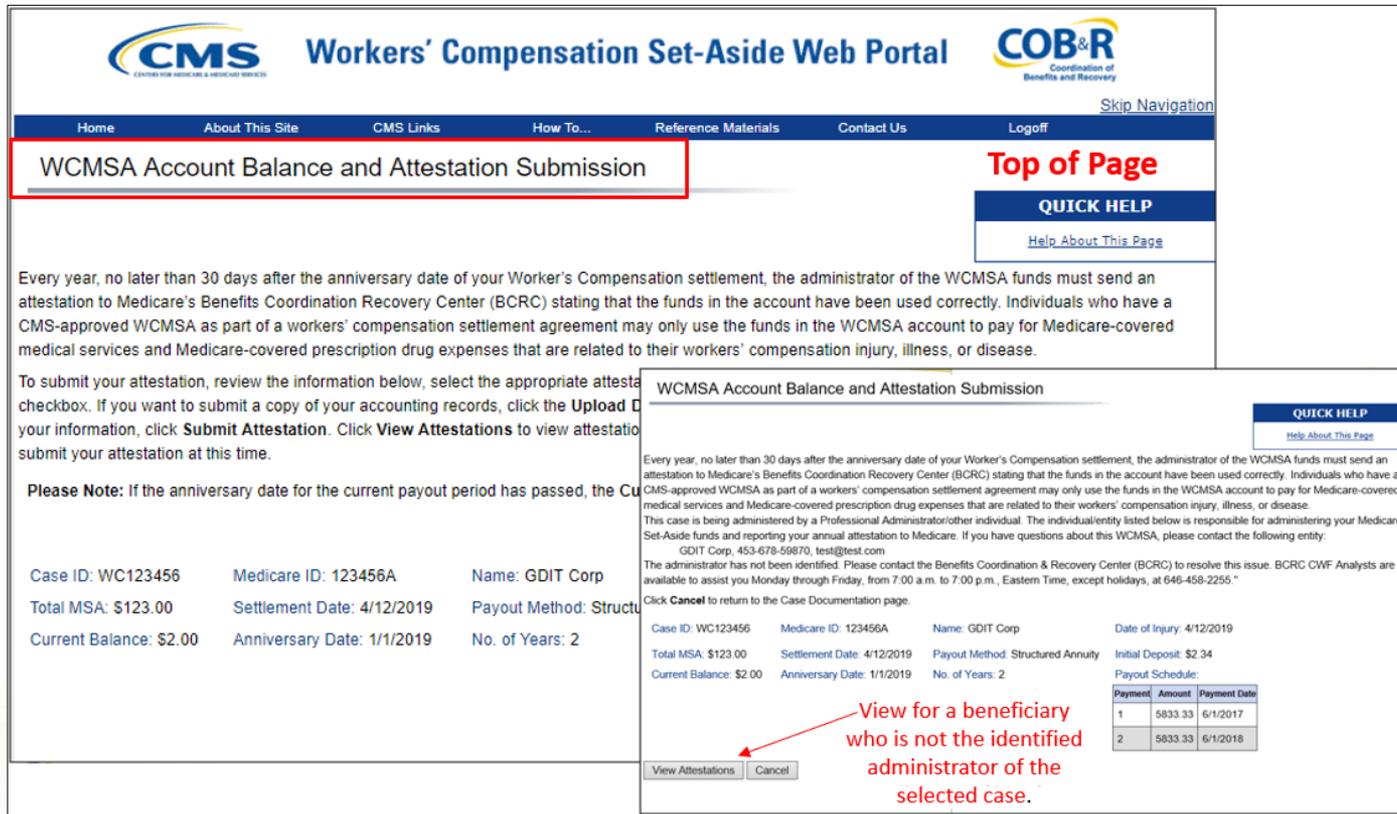


The screenshot shows the 'Case Documentation' page. At the top, there is a navigation bar with links: Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Logoff. Below the navigation bar, the page title 'Case Documentation' is displayed. A red box highlights the case information: 'Smith, John Medicare ID: 123456785A Case ID: XXXXXX'. To the right of this information is a 'QUICK HELP' button with a link to 'Help About This Page'. Below the case information, there is a paragraph of text explaining the page's purpose and search options. There are date selection fields for 'From Date' and 'To Date' (MM/DD/CCYY) and 'Search' and 'Clear' buttons. A message states: '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.' Below this, it says 'There are no documents to view for this case at this time.' A table lists document categories and their creation dates:

Document Category	Creation Date
<a href="#">Life Care Plan</a>	01/06/2008
<a href="#">Rated Age Information or Life Expectancy</a>	11/06/2009
<a href="#">Submitter Letter or Other Summary Documents</a>	01/06/2010
<a href="#">Proposed/Final Settlement Agreement or Court Order</a>	01/06/2010
<a href="#">Payment History</a>	01/06/2010
<a href="#">Proposed/Final Settlement Agreement or Court Order</a>	01/06/2010
<a href="#">Consent Form</a>	12/20/2010
<a href="#">Payment History</a>	01/06/2011
<a href="#">Life Care Plan</a>	01/19/2011
<a href="#">Payment History</a>	01/06/2012
<a href="#">Set-Aside Administrator or Copy of Agreement</a>	01/06/2018

At the bottom of the page, there are two buttons: 'Case Listing' and 'WCMSA Attestation Information'.

# WCMSA Account Balance & Attestation Submission (MyMedicare)



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 is 'WCMSA Account Balance and Attestation Submission', which is highlighted with a red box. A 'Top of Page' button and a 'QUICK HELP' section with a 'Help About This Page' link are also visible.

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

To submit your attestation, review the information below, select the appropriate attestation checkbox. If you want to submit a copy of your accounting records, click the Upload button. If you want to update your information, click **Submit Attestation**. Click **View Attestations** to view attestation submissions and submit your attestation at this time.

**Please Note:** If the anniversary date for the current payout period has passed, the Case Administrator will be unable to submit an attestation for that period.

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

Click **Cancel** to return to the Case Documentation page.

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

Click **Cancel** to return to the Case Documentation page.

Payout Schedule:		
Payment	Amount	Payment Date
1	5833.33	6/1/2017
2	5833.33	6/1/2018

View for a beneficiary who is not the identified administrator of the selected case.

# WCMSA Account Balance & Attestation Submission (MyMedicare) (2)

- Must be the administrator of the case to submit
- Select the appropriate attestation statement
- Enter the applicable monies spent
- Select the attestation checkbox
- Upload documentation if you wish to submit accounting records
- Click “Submit Attestation” button to submit your information
- Click “View Attestation” to view previously submitted attestations

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

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

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

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

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

To pay for the following:

Medical expenses: \$  .

Prescription drug expenses: \$  .

Taxes paid on interest earned: \$  .

The interest earned on these funds was: \$  .

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

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

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

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

**Bottom of Page**

# WCMSA Attestation Submission Verification (MyMedicare)

- Review information previously entered
- Use the “Previous” button to return to the form and make any needed corrections
- Use the “Continue” button to proceed to the confirmation page
- Click “Cancel” to return to the Case Listing Page

The screenshot displays the CMS Workers' Compensation Set-Aside Web Portal. The page title is "WCMSA Attestation Submission Verification". The CMS logo is in the top left, and the COB&R logo is in the top right. A navigation bar includes links for Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Logoff. A "Skip Navigation" link is also present. A "QUICK HELP" box with a "Help About This Page" link is on the right. The main content area contains the following text:

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

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

At the bottom, there are three buttons: "Previous", "Continue", and "Cancel".

# WCMSA Attestation Submission Confirmation (MyMedicare)

- Confirmation page will appear confirming that your attestation was submitted successfully
- “Continue” will return you back to the “Case Documentation” page

The screenshot shows the CMS Workers' Compensation Set-Aside Web Portal. The page title is "WCMSA Attestation Submission Confirmation". The navigation menu includes Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Logoff. A "QUICK HELP" button is visible on the right side. The main content area displays the following information:

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

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

A "Continue" button is located at the bottom left of the page.

# View Attestation Submissions

## Page (MyMedicare)

**Case Documentation**

Smith, John Medicare ID: 123456789 Case ID: XXXXX

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/YYYY) To Date:   (MM/DD/YYYY)

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 **CMF** 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 Case File	01/06/2008
Send Doc Information to Life Technology	01/06/2008
Subscriber Letter or Other Summary Document	01/06/2010
Completed Final Settlement Agreement or Court Order	01/06/2010
Current History	01/06/2010
Completed Final Settlement Agreement or Court Order	01/06/2010
Current Facts	10/20/2010
Current History	01/06/2011
Life Case File	01/19/2011
Current History	01/06/2012
See Public Administrator at County of Howard	01/06/2018

**View Attestation Submissions**

[Help About This Page](#)

The following information has been submitted for the Case ID listed on this page. Click Cancel to return to the WCMSA Account Balance and Attestation Submission page.

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

Payment	Amount	Payment Date
1	5833.33	6/1/2017
2	5833.33	6/1/2018

**WCMSAP Transactions:**

Date Submitted	Attestation Statement	Period From	Period Thru	Beginning Balance	Automatic Deposit	Interest Earned	Medical Expenses	Prescription Drug Expenses	Taxes Paid on Interest Earned	Balance	Documents Uploaded
4/20/2019	Completely Exhausted	9/4/2018	4/1/2019	\$11,577.00		\$499.00	\$7,034.19	\$4,735.99	\$305.82	\$0.00	attach1.pdf attach1ghghhg... attach1ghghhg... attach1ghghhg... attach1ghghhg... attach1ghghhg... attach1ghghhg... attach1ghghhg... attach1ghghhg... attach1ghghhg... attach1ghghhg...
6/1/2018	Annual Payout			\$5,743.67	\$5,833.33					\$11,577.00	
6/1/2017	Annual Payout			\$89.66	\$5,833.33					\$5,743.67	
5/30/2017	Exhausted Annual	8/1/2016	5/5/2017	\$7,465.66		\$75.00	\$4,850.00	\$2,745.00	\$35.32	\$89.66	attach2.htm
6/25/2016	Used Annual	7/1/2015	5/4/2016	\$16,741.66		\$199.00	\$7,075.00	\$2,250.00	\$150.00	\$7,465.66	attach2.htm attach4.htm
6/1/2016	Annual Payout			\$10,908.33	\$5,833.33					\$16,741.66	

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

Used the annual monies from the WCMSA account for the period of

Used the monies from the WCMSA account for the period of

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

COMPLETELY EXHAUSTED all monies in the WCMSA account for the period of

To pay for the following:

Medical expenses: \$

Prescription drug expenses: \$

Taxes paid on interest earned: \$

The interest earned on these funds was: \$

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

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

To upload supporting documents, click the Upload Documentation link.

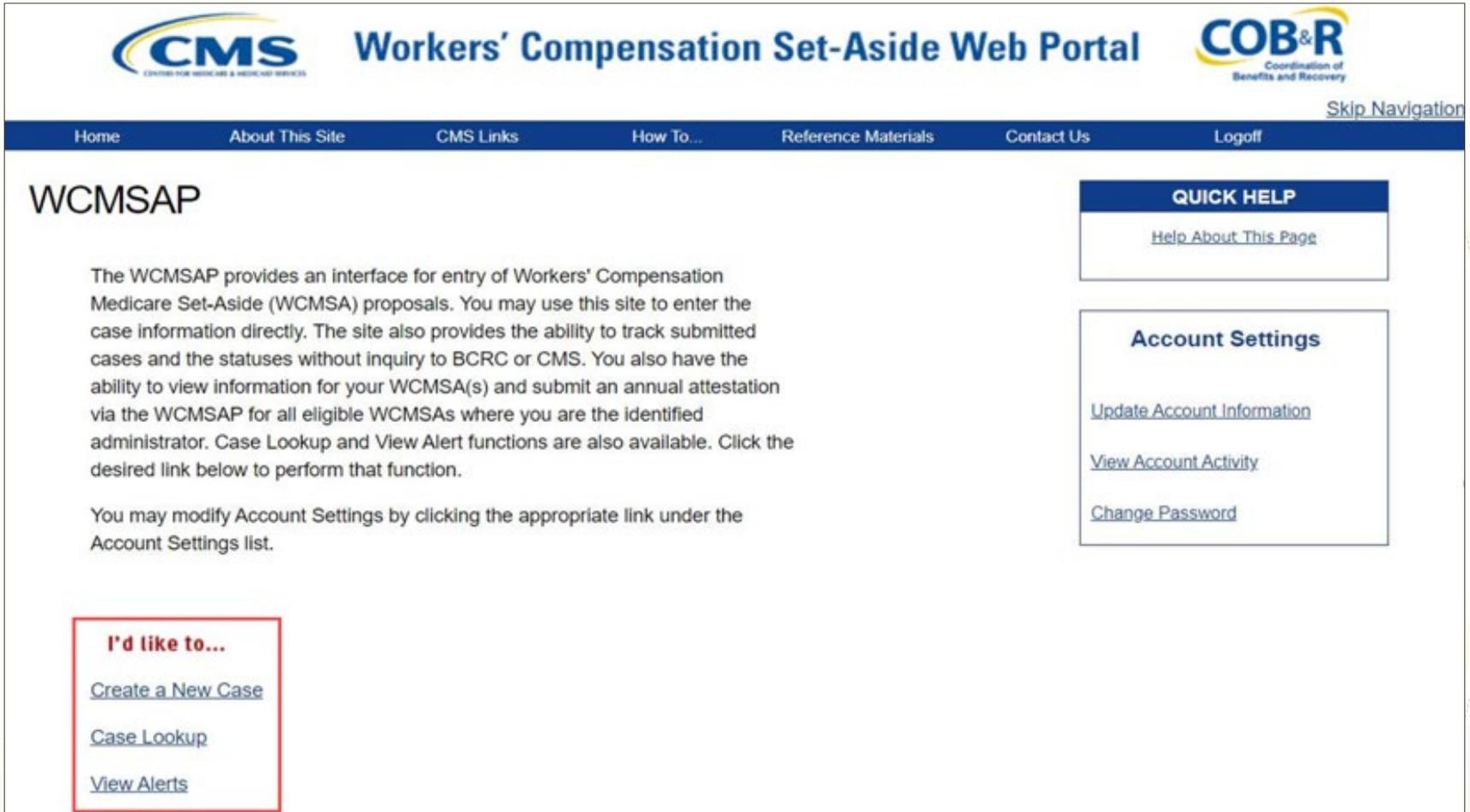
Documentation uploaded: WCMSA Account Records.pdf 2019-01-20 Details

1.

2.

# Updated Functions for Self and Representative Accounts

# WCMSAP Home Page (Self/Rep)



The screenshot shows the WCMSAP Home Page. At the top left is the CMS logo (Centers for Medicare & Medicaid Services). In the center is the title "Workers' Compensation Set-Aside Web Portal". At the top right is the COB&R logo. Below the title is a navigation bar with links: Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Logoff. On the right side of the navigation bar is a "Skip Navigation" link. The main content area is titled "WCMSAP" and contains a paragraph describing the system's purpose: "The WCMSAP provides an interface for entry of Workers' Compensation Medicare Set-Aside (WCMSA) proposals. You may use this site to enter the case information directly. The site also provides the ability to track submitted cases and the statuses without inquiry to BCRC or CMS. You also have the ability to view information for your WCMSA(s) and submit an annual attestation via the WCMSAP for all eligible WCMSAs where you are the identified administrator. Case Lookup and View Alert functions are also available. Click the desired link below to perform that function." Below this paragraph is another paragraph: "You may modify Account Settings by clicking the appropriate link under the Account Settings list." To the right of the main text are two boxes. The first is titled "QUICK HELP" and contains a link "Help About This Page". The second is titled "Account Settings" and contains three links: "Update Account Information", "View Account Activity", and "Change Password". At the bottom left, there is a red-bordered box titled "I'd like to..." containing three links: "Create a New Case", "Case Lookup", and "View Alerts".

# Case Information (Self)

- New tab, “WCMSA Administrator” will appear.
- Administrator Type is a required field as indicated by the asterisk.
- Default option is “Self.”
- If you are not the administrator of the case, you will need to select the Rep Payee or Professional Administrator radio button.

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 (Self) (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 (Self) (3)

- Professional Administrator: A professional entity will administer and account for the WCMSA that was established to protect Medicare's interests.
- Requires a copy of the Professional Administrator 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 (Self/Rep)

- 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.

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](#)

**QUICK HELP**

[Help About This Page](#)

# Case Summary Cont. (Self/Rep)

- Use “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 doc type 30 was not added.
- Click “Submit Case” once you have verified all information is correct.

Delete	Drug Name	Dosage	NDC	Frequency Per Day	Frequency Per Week	Frequency # Per Month	Frequency # Years
	ACETAMINOPHEN		62901-2690-04	1.0			15
	OXAZEPAM	10 MG	00172-4804-60	3.0			15

**Edit**

**Case Notes**

**Bottom Section**

2010-02-08 John Smith Attached additional medical forms.  
2010-01-10 John Smith Collecting documentation, saving as work in progress case.

**Edit**

**Case Documents**

05 - Submitter Letter or Other Summary Documents \*

subLetter.pdf

10 - Consent Form \*

ConsentForm.pdf

15 - Rated Age Information or Life Expectancy

20 - Life Care Plan \*

longCare.pdf

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

longCare.pdf

**30 - Set-Aside Administrator or Copy of Agreement**

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

Medical.pdf

40 - Payment History \*

payment.pdf

45 - Future Treatment Plans

50 - Supplement/Additional Information

# Additional Resources

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

# Questions & Answers



## **Slide 1: Workers' Compensation Attestation Enhancement Webinar for Self-Administration and Representative Account Users**

Welcome to the Workers' Compensation Attestation Enhancement Webinar for Self-Administration and Representative account users.

## **Slide 2: Presentation Topics**

Throughout this presentation, we will look at the background information, purpose of the enhancement, some high-level summary of changes, new functionality for users accessing WCMSAP through MyMedicare.gov, functionality for Self and Representative Accounts 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, when the WCMSA account had no money left, you were required to send in an attestation letter attesting that the funds had been depleted.

## **Slide 4: Purpose of Enhancement**

With that being said, CMS has identified process improvements to the WCMSA account expenditure tracking and attestation process by adding the electronic option. Additionally, although previous WCMSAP functionality did not allow users to access cases that were submitted via mail/CD-ROM, that functionality has been updated and users can now view all cases on the WCMSAP no matter how submitted.

## **Slide 5: High Level Summary of Changes**

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

## **Slide 6: Updated Functions for Users accessing their information from MyMedicare.gov**

We will begin by looking at the updated functions for beneficiary users accessing their information from MyMedicare.gov.

## **Slide 7: Accessing MSA from MyMedicare**

Log in to MyMedicare.gov to access the Home page.

**Slide 8: Accessing MSA from MyMedicare (2)**

After logging in, select the My Claims link from the menu at the top. On the My claims page, you will have a link to access your MSA cases.

**Slide 9: Accessing MSA from MyMedicare (3)**

After selecting the link, the disclaimer page will be displayed, and you will have to select “I Accept” before accessing your MSA Case list.

**Slide 10: Accessing MSA from MyMedicare (4)**

From your MSA Case list, select the Workers’ Compensation case you wish to review.

**Slide 11: Case Documentation (MyMedicare)**

From the MSA case list page, you will be taken directly to the “Case Documentation” page. 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 if you are the identified administrator. First, we will look at the “Case Listing” page.

**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 12: WCMSA Account Balance & Attestation Submission (MyMedicare)**

If you select the “WCMSA Attestation Information” button from the “Case Documentation” 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. If the beneficiary has not been identified as the administrator, they will not be able to submit an attestation but will be able to view attestations previously submitted on their behalf.

**Slide 13: WCMSA Account Balance & Attestation Submission (MyMedicare) (2)**

If you are the administrator of your case, you will be able to submit your attestation. To submit your attestation, review the information, 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 and you will be returned to the Welcome Page.

**Slide 14: WCMSA Attestation Submission Verification (MyMedicare)**

The information entered will display on the “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 15: WCMSA Attestation Submission Confirmation (MyMedicare)**

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

### **Slide 16: View Attestation Submissions Page (MyMedicare)**

Once you have submitted attestations, you will be able to view that information from the “View Attestations” button at the bottom of the “WCMSA Account Balance and Attestation Submission” page. In order to access this page from the Case Documentation page, you will click the WCMSA Attestation Information button and then the View Attestations button from the WCMSA Account Balance and Attestation Submission Page.

### **Slide 17: Updated Functions for Self and Representative Accounts**

Next, we will look at the updated functions for Self and Representative Accounts.

### **Slide 18: WCMSAP Home Page (Self/Rep)**

Your Account Home Screen has been updated to include information pertaining to your ability to submit an annual attestation for your case(s). To submit an attestation, you will use the same functionality as a MyMedicare user. Your case functions have not changed but we will take a look at a few changes within them.

### **Slide 19: Case Information (Self)**

When creating a case through your “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. This is required information as you will see indicated by the asterisk next to Administrator Type. The default option is “Self.” A Self Administrator is a Medicare beneficiary who is administering their WCMSA on their own behalf. If you are not the administrator of the case, you will need to select the Rep Payee or Professional Administrator radio button and enter their information as explained on the next slides.

### **Slide 20: Case Information (Self) (2)**

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

### **Slide 21: Case Information (Self) (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 22: Case Documents (Self/Rep)**

If you selected the Administrator Type of Professional Administrator, you will be required to upload a copy of the Set-Aside Administrator or Copy of Agreement under the 30 - Set-Aside Administrator or Copy of Agreement “Add Files” link on the Documents tab before you will be able to submit your case. You will see that the form is marked with an asterisk indicating that it is a required form. Select the “Add Files” link and attach your form.

**Slide 23: Case Summary Cont. (Self/Rep)**

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 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 24: Additional Resources**

Additional information can be found in the [WCMSAP User Manual](#) 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. Questions can be submitted to [mspcentral@cms.hhs.gov](mailto:mspcentral@cms.hhs.gov).

**Slide 25: Questions & Answers**

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

**Acronyms**

BCRC	Benefits Coordination & Recovery Center
CMS	Centers for Medicare & Medicaid Services
EDI	Electronic Data Interchange
MSA	Medicare Set-Aside
WCMSAP	Workers' Compensation Medicare Set-Aside Portal