

Account Setup - Representative Account

Slide 1 of 22 - Account Setup - Representative Account

Workers' Compensation Medicare Set-Aside Portal (WCMSAP)
Account Setup - Representative Account

Version 7.0, 04/01/2024
Note: CMS reserves the right to modify this presentation. To ensure you have the most current version, verify that the version and date on this page match the version and date on the corresponding page of the PDF currently available on:
<https://go.cms.gov/wcmsa/>.

Slide notes

Welcome to the Workers' Compensation Medicare Set-Aside Portal (WCMSAP) Account Setup course.

Note: This module is for the Account Manager of the representative account.

A representative account indicates that the submitter is registering as a non-corporate entity with no Employer Identification Number (EIN) but will be submitting multiple WCMSA requests.

Slide 2 of 22 - Disclaimer

Disclaimer

While all information in this document is believed to be correct at the time of writing, this Computer Based Training (CBT) is for educational purposes only and does not constitute official Centers for Medicare & Medicaid Services (CMS) instructions for the WCMSAP. All affected entities are responsible for following the applicable CMS instructions found at the following link:

<https://www.cms.gov/medicare/coordination-benefits-recovery/workers-comp-set-aside-arrangements/portal>.

Slide notes

While all information in this document is believed to be correct at the time of writing, this Computer Based Training (CBT) is for educational purposes only and does not constitute official Centers for Medicare & Medicaid Services (CMS) instructions for the WCMSAP.

All affected entities are responsible for following the applicable CMS instructions found at the following link: [WCMSAP Website](#).

Slide 3 of 22 - Course Overview

Course Overview

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

- Explain how to setup a WCMSAP account as a Representative
- Establish login identification (ID/Password) as a Representative
- Describe next steps once the registration has been completed



Slide notes

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

- Explain how to setup a WCMSAP account as a Representative,
- Establish login identification (ID/Password) as a Representative, and
- Describe the next steps once registration has been completed.

Slide 4 of 22 - Getting Started

Getting Started

- **Account Manager**
 - **Responsible for completing Account Setup**
 - Once New Registration is complete
 - Representative has received an email from the Benefits Coordination & Recovery Center (BCRC)
 - Personal Identification Number (PIN)

***Note: The contact address for the BCRC has changed. As a result, the system-generated Profile Report Email Notifications have been updated. The new address is:**

Section 111 Reporting Program
P.O. Box 138892
Oklahoma City, OK 73113

Slide notes

The Account Manager is responsible for completing the Account Setup once the New Registration step is completed and the representative has received an email from the Benefits Coordination & Recovery Center (BCRC) containing the Personal Identification Number (PIN) and has provided the Account ID/Submitter ID recorded on the WCMSA Registration Completed Successfully Page.

Upon receipt of the Account ID and PIN, you can provide the information to a designated Account Manager, or assign yourself to this role.

***Note: The contact address for the BCRC has changed. As a result, the system-generated Profile Report Email Notifications have been updated. The new address is:**

Section 111 Reporting Program

P.O. Box 138892

Oklahoma City, OK 73113

Slide 5 of 22 - Login Warning Page

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.

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

Slide notes

In order to perform the WCMSAP Account Setup, the Account Manager must go to the WCMSAP Website found at the following URL: [WCMSAP Website](#).

You must review the Login Warning page and click the I Accept link at the bottom of the page to continue. Otherwise, you will be denied access to the WCMSAP site and will be unable to complete Account Setup.

The Login Warning Page provides information about WCMSAP security measures including access, penalty, and privacy laws.

You must agree to the terms of this warning each time you access the WCMSAP application.

Slide 6 of 22 - Login/Welcome to the WCMSAP Page

The screenshot shows the 'Welcome to the WCMSAP' page. At the top, there is a navigation bar with links: 'About This Site', 'CMS Links', 'How To...', 'Reference Materials', and 'Contact Us'. The main heading is 'Welcome to the WCMSAP'. Below this, a paragraph explains the site's purpose for entering Workers' Compensation Medicare Set-Aside Arrangements (WCMSA) proposals. To the right, there is a 'Sign into your account' box with fields for 'User Name' and 'Password', and links for 'Forgot ID' and 'Forgot Password'. Below the sign-in box, there are 'Login' and 'Clear' buttons. Further down, a 'WCMSAP Message' section provides information for Medicare beneficiaries. Below that, a 'GETTING STARTED' section refers to the 'How To Get Started' menu option. At the bottom, a process flow shows two steps: 'STEP 1' with a 'New Registration' button and 'STEP 2' with an 'Account Setup' button. The 'Account Setup' button is highlighted with a red box and includes the text '(Account ID and PIN required)' below it.

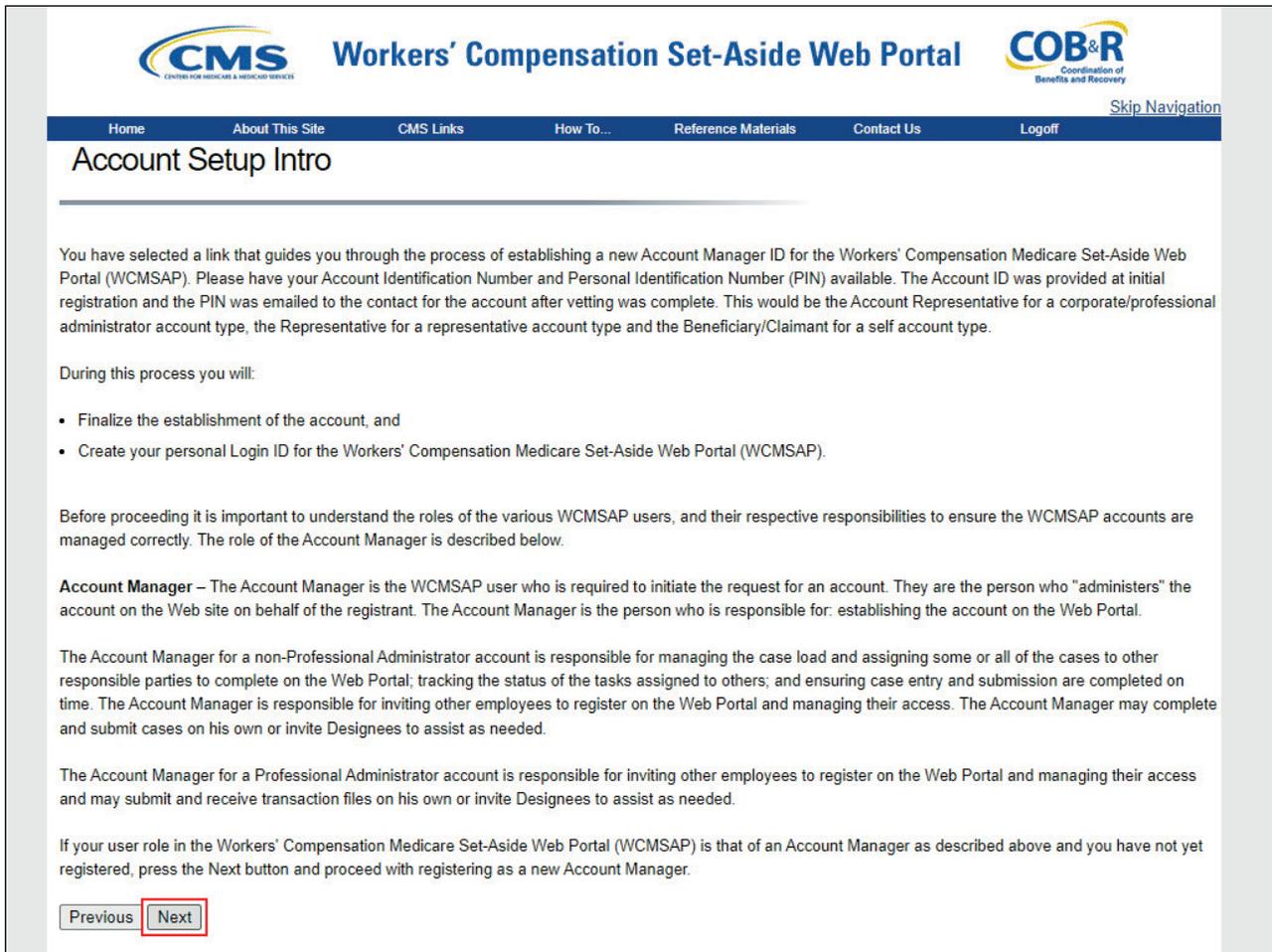
Slide notes

Once you have clicked the [I Accept] link, you will be brought to the Login/Welcome to the WCMSAP page.

To begin the next step in the registration process, click Account Setup.

Note: A new link, “Medicare.gov” has been added to the CMS Links dropdown menu and the “General Medicare” link has been renamed to “CMS.gov”.

Slide 7 of 22 - Account Setup Intro Page



The screenshot shows the 'Account Setup Intro' page of the Workers' Compensation Set-Aside Web Portal. The page header includes the CMS logo (Center for Medicare & Medicaid Services), the portal title 'Workers' Compensation Set-Aside Web Portal', and the COB&R logo (Coordination of Benefits and Recovery). A navigation bar contains links for Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Logoff, along with a 'Skip Navigation' link. The main content area is titled 'Account Setup Intro' and contains the following text:

You have selected a link that guides you through the process of establishing a new Account Manager ID for the Workers' Compensation Medicare Set-Aside Web Portal (WCMSAP). Please have your Account Identification Number and Personal Identification Number (PIN) available. The Account ID was provided at initial registration and the PIN was emailed to the contact for the account after vetting was complete. This would be the Account Representative for a corporate/professional administrator account type, the Representative for a representative account type and the Beneficiary/Claimant for a self account type.

During this process you will:

- Finalize the establishment of the account, and
- Create your personal Login ID for the Workers' Compensation Medicare Set-Aside Web Portal (WCMSAP).

Before proceeding it is important to understand the roles of the various WCMSAP users, and their respective responsibilities to ensure the WCMSAP accounts are managed correctly. The role of the Account Manager is described below.

Account Manager – The Account Manager is the WCMSAP user who is required to initiate the request for an account. They are the person who "administers" the account on the Web site on behalf of the registrant. The Account Manager is the person who is responsible for: establishing the account on the Web Portal.

The Account Manager for a non-Professional Administrator account is responsible for managing the case load and assigning some or all of the cases to other responsible parties to complete on the Web Portal; tracking the status of the tasks assigned to others; and ensuring case entry and submission are completed on time. The Account Manager is responsible for inviting other employees to register on the Web Portal and managing their access. The Account Manager may complete and submit cases on his own or invite Designees to assist as needed.

The Account Manager for a Professional Administrator account is responsible for inviting other employees to register on the Web Portal and managing their access and may submit and receive transaction files on his own or invite Designees to assist as needed.

If your user role in the Workers' Compensation Medicare Set-Aside Web Portal (WCMSAP) is that of an Account Manager as described above and you have not yet registered, press the Next button and proceed with registering as a new Account Manager.

At the bottom of the page, there are two buttons: 'Previous' and 'Next'. The 'Next' button is highlighted with a red border.

Slide notes

The Account Setup Intro page will appear. This page describes the Account Setup process and the role of the Account Manager.

As the Account Manager, you will establish and administer your WCMSAP account. Click Next to continue.

Slide 8 of 22 - Account Setup Page

The screenshot shows the 'Account Setup' page. At the top left is the CMS logo (Centers for Medicare & Medicaid Services). To its right is the page title 'Workers' Compensation Set-Aside Web Portal'. Further right is the COB&R logo (Coordination of Benefits and Recovery). A navigation bar contains links: 'About This Site', 'CMS Links', 'How To...', 'Reference Materials', and 'Contact Us'. A 'Skip Navigation' link is in the top right. The main heading is 'Account Setup'. Below it, instructions state: 'Please enter your Account Identification Number (Account ID) and Personal Identification Number (PIN). The Account ID was provided at initial registration and the PIN was emailed to the contact for the account after vetting was complete.' A 'QUICK HELP' box with a 'Help About This Page' link is on the right. A note says: 'New users must go through the process of creating a Login ID and Password.' The form contains: 'An asterisk (*) indicates a required field.' followed by four input fields: 'Account ID: *', 'Personal Identification Number (PIN): *', 'Account Manager's E-mail Address: *', and 'Re-enter E-Mail Address: *'. A 'Previous' and 'Next' button are at the bottom of the form. A footer bar contains links for 'CMS/HHS Vulnerability Disclosure Policy', 'Privacy Policy', 'User Agreement', and 'Adobe Acrobat'.

Slide notes

The Account Setup page will appear.

This page requires you to enter the Account ID and PIN for this representative account.

Your email address is also required in order to verify that you are a registered user. Your email address must be entered twice.

Note: If the email address you enter is found in the system, you will be prohibited from continuing the account setup process.

Slide 9 of 22 - Account Setup Page

The screenshot shows the 'Account Setup' page of the 'Workers' Compensation Set-Aside Web Portal'. At the top left is the CMS logo (Centers for Medicare & Medicaid Services). At the top right is the COB&R logo (Coordination of Benefits and Recovery). A navigation bar contains links: 'About This Site', 'CMS Links', 'How To...', 'Reference Materials', 'Contact Us', and 'Skip Navigation'. The main heading is 'Account Setup'. Below it, instructions state: 'Please enter your Account Identification Number (Account ID) and Personal Identification Number (PIN). The Account ID was provided at initial registration and the PIN was emailed to the contact for the account after vetting was complete.' A 'QUICK HELP' box with a 'Help About This Page' link is on the right. Further instructions state: 'New users must go through the process of creating a Login ID and Password.' A note says: 'An asterisk (*) indicates a required field.' The form contains four required fields: 'Account ID: *', 'Personal Identification Number (PIN): *', 'Account Manager's E-mail Address: *', and 'Re-enter E-Mail Address: *'. At the bottom of the form are 'Previous' and 'Next' buttons, with the 'Next' button highlighted by a red rectangular box. A footer bar contains links for 'CMS/HHS Vulnerability Disclosure Policy', 'Privacy Policy', 'User Agreement', and 'Adobe Acrobat'.

Slide notes

When you have completed the Account Setup page, click Next to continue. The system will validate the Account ID and PIN.

If the Account ID and/or PIN are invalid, the system will display an error message.

Slide 10 of 22 - Account Setup - Representative Information

The screenshot displays the 'Workers' Compensation Set-Aside Web Portal'. At the top left is the CMS logo (Center for Medicare & Medicaid Services). To its right is the portal title 'Workers' Compensation Set-Aside Web Portal'. Further right is the COB&R logo (Coordination of Benefits and Recovery). A navigation bar below the logos contains links: 'About This Site', 'CMS Links', 'How To...', 'Reference Materials', and 'Contact Us'. A 'Skip Navigation' link is located at the top right. The main heading is 'Account Setup - Representative Information'. On the right side, there is a 'QUICK HELP' box with a link 'Help About This Page'. The central area contains a red-bordered box titled 'Representative Information' with the following details: 'First Name: JaneM: A Last Name: Smith', 'Address Line 1: 200 Test Avenue', 'Address Line 2: Suite 2-B', 'City: Towson', 'State: Maryland', 'Zip Code: 21204- 3276', and 'Phone Number: 410-832-8350'. Below this information are 'Previous' and 'Next' buttons. At the bottom of the page, a footer contains links for 'CMS/HHS Vulnerability Disclosure Policy', 'Privacy Policy', 'User Agreement', and 'Adobe Acrobat'.

Slide notes

After all information has been verified by the system, the Account Setup page will appear.

This page displays information entered during the initial registration process.

Review the listed information. If any of the information is incorrect, contact an Electronic Data Interchange (EDI) Representative to have it corrected.

Slide 11 of 22 - Account Manager Personal Information Page

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

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

Account Manager Personal Information

Please click this button if information is identical to that provided during initial registration.

Same as Submitter

QUICK HELP
[Help About This Page](#)

An asterisk (*) indicates a required field.

First Name: * MI: Last Name: *

E-mail Address: *

Phone: * - - ext.

Mailing Address:

Address Line 1: *

Address Line 2:

City: *

State: * Please Select

Zip Code: * -

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

[View and print the agreement below](#)

User Agreement

Slide notes

The Account Manager Personal Information page will then appear.

Enter the required personal information.

The information you enter here is required for subsequent communications.

If the Account Manager information is the same information that was entered for the Representative during New Registration, click the Same as Submitter button to populate the fields.

Note: You can register as an Account Manager for an account if you are already a registered Medicare, Medicaid, and SCHIP Extension Act 2007 (MMSEA) Mandatory Reporting user.

Slide 12 of 22 - User Agreement

E-mail Address: *

Phone: * - - - ext.

Mailing Address:

Address Line 1: *

Address Line 2:

City: *

State: *

Zip Code: * -

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

[View and print the agreement below](#)

User Agreement

1. Purpose of Workers' Compensation Medicare Set-aside Portal (WCMSAP) Sec

The Workers' Compensation Medicare Set-Aside Portal (WCMSAP) will allow for the compensation Medicare set-aside arrangement (WCMSA) proposals for future medi introduction of a WCMSAP web portal, WCMSA submitters will receive prompt and c

Please check the following box:

I accept the User Agreement and Privacy Policy above

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

Slide notes

When the Account Manager information has been entered, scroll down to view the User Agreement.

You must read and accept the terms of this agreement. Click the "I accept" check box and then click Next to continue with the Account Setup.

You may print a copy of this for your records.

The system will validate that all required fields on this page have been entered.

If the Account Manager has entered incomplete or invalid information (i.e., the entered information does not pass the WCMSAP edits), the system will display an error message.

Slide 13 of 22 - Account Manager Login Information Page

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

Account Manager Login Information

The security information requested on this page will allow the system to authenticate your identity each time you log on. This will ensure only you are provided the access and updating privileges restricted to the Account Manager.

QUICK HELP
[Help About This Page](#)

Choose your Login ID and password carefully.

- Login IDs must be 7 characters
- Login IDs must be unique within the system
- Login IDs must be in the format of AA999AA (first two alphabetic, next three numeric, last two alphabetic)
- Password must be changed every sixty (60) days
- Password must consist of at least eight (8) characters
- Password must contain at least one upper-case letter, one lower-case letter, one number and one special character
- Password must contain a minimum of four (4) changed characters from the previous password
- Password cannot be changed more than once per day
- Password must be different from the previous twenty four (24) passwords
- Password cannot contain reserved words listed on the help page

An asterisk (*) indicates a required field.

Login ID *

Password *

Re-enter Password *

The Security Questions allow you to regain account access if you forget your password. Please note the answers you provide to these questions should be actual answers and not hints for your password.

Choose Security Questions and Provide Answers

Security Question 1 *

Answer 1 *

Slide notes

If you are a new user, the Account Manager Login Information page will appear, requesting you to set up a Login ID and Password using the following guidelines.

Note: If you have already registered to use the WCMSAP, this page will not display, and you will not be prompted to create a Login ID and Password.

Login IDs must be 7 characters and must be in the format of AA999AA:

- first two alphabetic,
- next three numeric,
- last two alphabetic.

Login ID and Password cannot be the same and the password must adhere to the following standards:

- must be changed every sixty days,
- must consist of at least eight characters,
- must contain at least one uppercase letter,
- one lowercase letter,

- one number, and
- one special character.

The password must also contain a minimum of four changed characters from the previous password. It cannot be changed more than once per day, must be different from the previous 24 passwords, and not contain any words from the reserved words list.

The updated Reserved Words List can be referenced in the latest WCMSAP User Guide.

Slide 14 of 22 - Account Manager Login/Security Questions

Choose your Login ID and password carefully.

- Login IDs must be 7 characters
- Login IDs must be unique within the system
- Login IDs must be in the format of AA999AA (first two alphabetic, next three numeric, last two alphabetic)
- Password must be changed every sixty (60) days
- Password must consist of at least eight (8) characters
- Password must contain at least one upper-case letter, one lower-case letter, one number and one special character
- Password must contain a minimum of four (4) changed characters from the previous password
- Password cannot be changed more than once per day
- Password must be different from the previous twenty four (24) passwords
- Password cannot contain reserved words listed on the help page

An asterisk (*) indicates a required field.

Login ID *

Password *

Re-enter Password *

The Security Questions allow you to regain account access if you forget your password. Please note the answers you provide to these questions should be actual answers and not hints for your password.

Choose Security Questions and Provide Answers

Security Question 1 *

Answer 1 *

Security Question 2 *

Answer 2 *

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

Slide notes

The security information requested on this page will allow the system to authenticate your identity each time you log in to the WCMSAP.

Create your Login ID and enter and re-enter a Password. Select 2 Security Questions and Answers and click Next.

You will use your Login ID and Password to enter the WCMSAP site and manage the account, create and view cases, and upload file attachments.

The Security Questions will allow you to access your Login ID and reset your Password in the event you forget either one.

When you have completed the Account Manager Login Information page, click Next to continue.

Slide 15 of 22 - Account Manager Summary Page

Account Manager Summary

Note: If the AM is a brand new AM, the text is below.

Please review your personal and login Information. If you need to change the information, click the 'Edit' button. If you are satisfied with the information click the 'Submit Account Setup' button to submit your information. Click 'Cancel' to cancel the setup process; all data will be lost. Please print this page for your records.

Note: If the AM is an existing AM, the text is below.

Please review your personal and login Information. If you are satisfied with the information click the 'Submit Account Setup' button to submit your information. Click 'Cancel' to cancel the setup process; all data will be lost. Please print this page for your records.

QUICK HELP
[Help About This Page](#)

Personal Information

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

Login ID

Login ID: AA123bb

Mailing Address:

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

Slide notes

The Account Manager Summary page will appear.

This page lists all of the information you entered during Account Setup.

All information should be reviewed and verified before continuing.

To make any corrections, or to change previously entered information, click the Edit button next to the section that needs to be modified.

This will return you to the applicable page to make modifications.

Slide 16 of 22 - Account Manager Login Information

Choose your Login ID and password carefully.

- Login IDs must be 7 characters
- Login IDs must be unique within the system
- Login IDs must be in the format of AA999AA (first two alphabetic, next three numeric, last two alphabetic)
- Password must be changed every sixty (60) days
- Password must consist of at least eight (8) characters
- Password must contain at least one upper-case letter, one lower-case letter, one number and one special character
- Password must contain a minimum of four (4) changed characters from the previous password
- Password cannot be changed more than once per day
- Password must be different from the previous twenty four (24) passwords
- Password cannot contain reserved words listed on the help page

An asterisk (*) indicates a required field.

Login ID *

Password *

Re-enter Password *

The Security Questions allow you to regain account access if you forget your password. Please note the answers you provide to these questions should be actual answers and not hints for your password.

Choose Security Questions and Provide Answers

Security Question 1 * Please Select

Answer 1 *

Security Question 2 * Please Select

Answer 2 *

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

Slide notes

Change any of the information as needed.

Once you have finished editing the information, click Next to return to the Account Manager Summary page.

Slide 17 of 22 - Account Manager Summary

Account Manager Summary

Note: If the AM is a brand new AM, the text is below.

Please review your personal and login Information. If you need to change the information, click the 'Edit' button. If you are satisfied with the information click the 'Submit Account Setup' button to submit your information. Click 'Cancel' to cancel the setup process; all data will be lost. Please print this page for your records.

Note: If the AM is an existing AM, the text is below.

Please review your personal and login Information. If you are satisfied with the information click the 'Submit Account Setup' button to submit your information. Click 'Cancel' to cancel the setup process; all data will be lost. Please print this page for your records.

Personal Information

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

Login ID

Login ID: AA123bb

Mailing Address:

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

QUICK HELP
[Help About This Page](#)

Slide notes

If you need to return to the Account Manager Login Information page, click Previous.

If you need to cancel the account setup, click Cancel.

To submit your information, click Submit Account Setup.

Slide 18 of 22 - Thank You

The screenshot shows the 'Thank You' page of the Workers' Compensation Set-Aside Web Portal. At the top, there are logos for CMS (Center for Medicare & Medicaid Services) and COB&R (Coordination of Benefits and Recovery). A navigation bar includes links for 'About This Site', 'CMS Links', 'How To...', 'Reference Materials', and 'Contact Us', along with a 'Skip Navigation' link. The main heading is 'Thank You'. Below it, a 'Print this page' icon is visible. A message states: 'You have successfully completed the Account Setup for the Workers' Compensation Medicare Set-Aside Web site and established yourself as the Account Manager for the Account ID. Please print this page for your records.' A red-bordered box highlights the 'Next Steps' section, which contains instructions: 'Upon account setup completion, you will receive an E-mail containing a Profile Report. This Profile Report must be signed and then returned to the COB in accordance with the instructions noted within the E-mail. You will not be able to create cases within the portal until a signed Profile Report has been received and processed by the COB. Prior to the submission of a signed Profile Report, you will have access to limited functionality within the portal. For example, you may return to the Workers' Compensation Medicare Set-Aside Web site Welcome page, login using the Login ID and Password you just created and invite other users to become Account Designees associated with your Account ID. This is done by using the "Designee Maintenance" link on the WCMSAP Home page after you have logged into the WCMSAP Workers' Compensation Medicare Set-Aside Web site.' Below this, a red-bordered box highlights a link: 'Workers' Compensation Set-Aside Welcome Page'. The footer contains links for 'CMS/HHS Vulnerability Disclosure Policy', 'Privacy Policy', 'User Agreement', and 'Adobe Acrobat'.

Slide notes

The system will display a Thank You page with instructions for your next steps after successful Account Setup.

Click the Workers' Compensation Medicare Set-Aside Welcome Page link to return to the Welcome page.

Slide 19 of 22 - Next Steps

Next Steps

- Account Manager controls administration of WCMSAP account
 - Once account setup is complete, email notification will be sent to you
 - Email will also include Profile Report
 - Contact EDI Department if Profile Report not received within 10 business days
 - Must review, sign, and return Profile Report to BCRC within 60 business days
 - You cannot submit, view, or create cases until the signed Profile Report is received by the BCRC
 - If sending by email, use “WCMSAP Profile Report” in subject line
 - If signed Profile Report is not received within timeframe, account will be automatically deleted on the 60th business day
 - If account is deleted, you must start the registration process from the beginning
 - Once Profile Report is received by BCRC, you may login to use your account

Slide notes

At this point, you will have successfully set up the account and registered yourself as the Account Manager.

As the Account Manager, you control the administration of the WCMSAP account.

Upon completion of all information for the account setup, an email notification will be sent to you.

The email will also include a Profile Report, noting all information previously recorded during registration and any additional information provided during the account setup.

Contact the EDI Department if you do not receive a Profile Report after 10 business days.

The profile report must be reviewed for accuracy then signed and returned to the BCRC.

You cannot submit, view, or create cases until the signed Profile Report is received by the BCRC.

You will have 60 business days to review, sign, and return the Profile Report to the BCRC.

When returning the signed Profile Report via email, use “WCMSAP Profile Report” in the subject line.

If a signed Profile Report is not received within that timeframe, the account will be automatically deleted on the 60th business day.

If the account is deleted, you must start the registration process from the beginning.

After the report has been received by the BCRC, you can login to the account to maintain account and case information, upload and replace documents, submit cases, and manage Designee access.

Slide 20 of 22 - Course Summary

Course Summary

You are now able to:

- Explain how to setup a WCMSAP account as a Representative
- Establish login identification (ID/Password) as a Representative
- Describe next steps once the registration has been completed



Slide notes

You are now able to:

- Explain how to setup a WCMSAP account as a Representative,
- Establish login identification (ID/Password) as a Representative, and
- Describe the next steps once registration has been completed.

Slide 21 of 22 - Conclusion



You have completed the WCMSAP Account Setup - Representative course. The information in this course can be referenced by using the document at the link below:

<https://www.cob.cms.hhs.gov/WCMSA/assets/wcmsa/userManual/WCMSAUserManual.pdf>

Slide notes

You have completed the WCMSAP Account Setup -Representative course. The information in this course can be referenced by using the document at the following link: [WCMSAP User Guide PDF](https://www.cob.cms.hhs.gov/WCMSA/assets/wcmsa/userManual/WCMSAUserManual.pdf).

Slide 22 of 22 - WCMSAP Training Survey



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

[https://www.surveymonkey.com/s/WCMSAPTraining.](https://www.surveymonkey.com/s/WCMSAPTraining)

Slide notes

If you have any questions or feedback on this material, please go to the following URL: [WCMSAP Training Survey](https://www.surveymonkey.com/s/WCMSAPTraining).