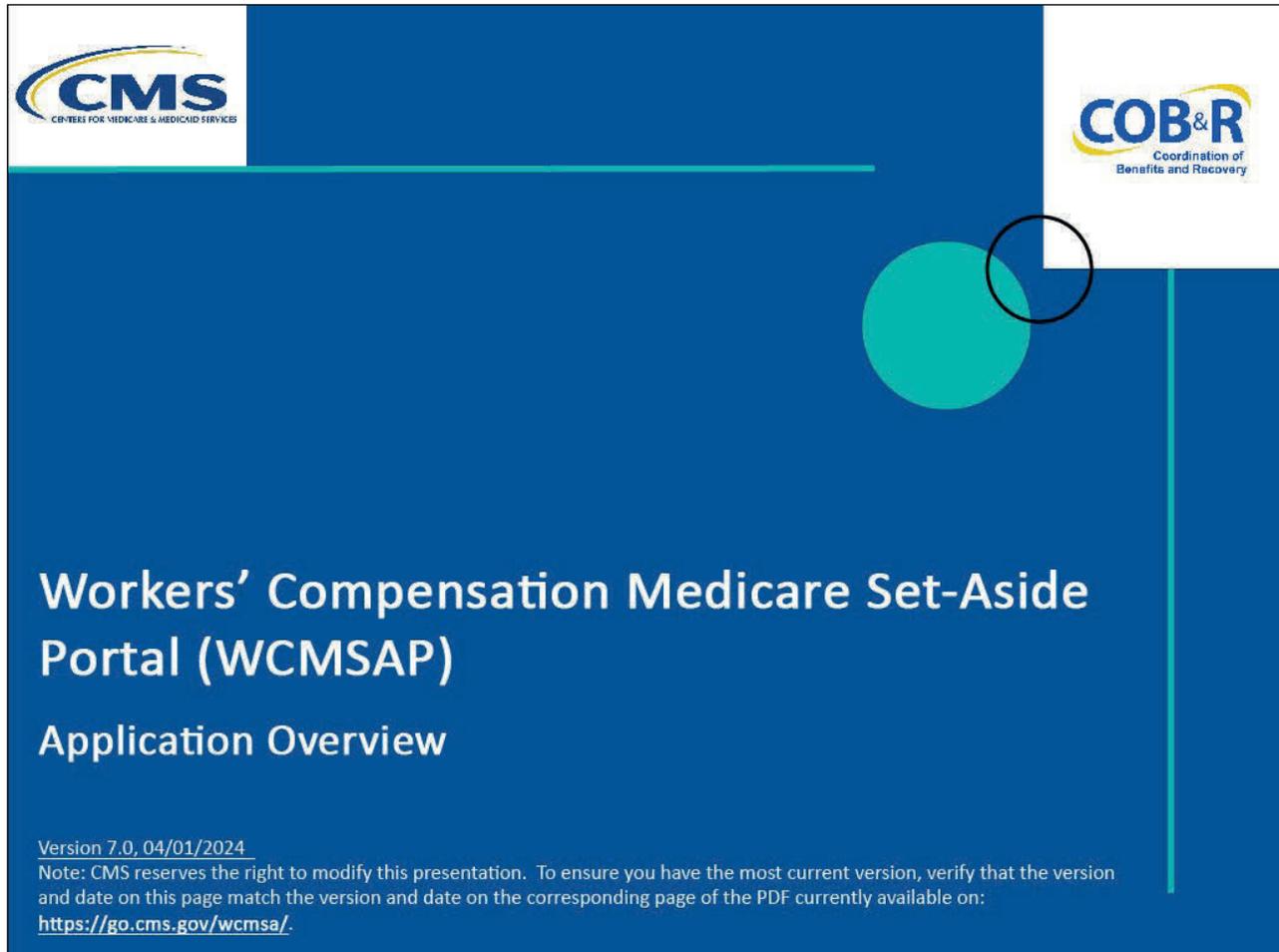


## Application Overview

### Slide 1 of 29 - Application Overview



The slide features a dark blue background with a teal circle on the right side. In the top left corner, there is a white box containing the CMS logo (Centers for Medicare & Medicaid Services). In the top right corner, there is a white box containing the COB&R logo (Coordination of Benefits and Recovery). The main title is centered in white text, and a version note with a URL is located at the bottom left.

**CMS**  
CENTERS FOR MEDICARE & MEDICAID SERVICES

**COB&R**  
Coordination of  
Benefits and Recovery

# Workers' Compensation Medicare Set-Aside Portal (WCMSAP)

## Application Overview

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) Application Overview course.

## Slide 2 of 29 - 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 29 - Course Overview**

## Course Overview

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

- Navigate the WCMSAP
- Discuss menu options within the WCMSAP
- Complete the Yearly Attestation Information



**Slide notes**

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

- Navigate the WCMSAP,
- Discuss menu options within the WCMSAP, and
- Complete the Yearly Attestation Information.

## Slide 4 of 29- Menu Options

**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 [Skip Navigation](#)

[How To Use This Site](#)

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

## WCMSAP

The WCMSAP provides an interface for entry of Workers' Compensation Medicare Set-Aside (WCMSA) proposals. You may use this site to enter the case information directly. The site also provides the ability to track submitted cases and the statuses without inquiry to BCRC or CMS. Case Lookup and View Alert functions are also available. Click the desired link below to perform that function.

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

**I'd like to...**

[Create a New Case](#)

[Case Lookup](#)

[View Alerts](#)

**Account Settings**

[Update Account Information](#)

[Designee Maintenance](#)

[View Account Activity](#)

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

## Slide notes

After a successful login, the WCMSAP Home page will appear.

The navigation menu at the top of each page gives the user access to various parts of the WCMSAP to facilitate using the application through the following menu options: "About This Site"; "CMS Links"; "How To"; "Reference Materials"; and "Contact Us".

About This Site navigates to the How to Use This Site link, offering general information on how to use the WCMSAP application.

Slide 5 of 29 - CMS Links

The screenshot displays the 'Workers' Compensation Set-Aside Web Portal' interface. 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 for Home, About This Site, CMS Links (highlighted with a red box), How To..., Reference Materials, Contact Us, and Logoff. A 'Skip Navigation' link is also present. The CMS Links dropdown menu is open, showing four options: Workers Compensation Agency Services, General Medicare, Medicare.gov, and Coordination of Benefits. Below the navigation bar, the main content area is titled 'WCMSAP'. It contains a paragraph explaining the system's purpose: 'The WCMSAP provides an interface for entry of Workers' Compensation Medicare Set-Aside (WCMSA) proposals. You may use this site to enter the case information directly. The site also provides the ability to track submitted cases and the statuses without inquiry to BCRC or CMS. Case Lookup and View Alert functions are also available. Click the desired link below to perform that function.' Below this paragraph, it states: 'You may modify Account Settings by clicking the appropriate link under the Account Settings list.' To the right of the main content, there are two boxes: 'QUICK HELP' with a link to 'Help About This Page', and 'Account Settings' with links for 'Update Account Information', 'Designee Maintenance', and 'View Account Activity'. At the bottom of the page, there is a footer with links for 'CMS/HHS Vulnerability Disclosure Policy', 'Privacy Policy', 'User Agreement', and 'Adobe Acrobat'. Below the screenshot, there is a section for 'Slide notes' which provides context on the CMS Links menu changes.

Slide notes

CMS Links provides links to the Workers' Compensation Agency Services page, the Medicare Website, Medicare.gov, and the Coordination of Benefits Website.

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 6 of 29 - How To Options

The screenshot displays the WCMSAP web portal. The header includes the CMS logo (Center for Medicare & Medicaid Services) and the COB&R logo (Coordination of Benefits and Recovery). The main 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 'How To...' dropdown menu is open, listing the following options: How to Get Started, How To Request Your Login ID, How To Request Your Password, How To Change Your Password, How To Reset Your PIN, How To Change Your Authorized Representative, How To Change Your Account Manager, and How To Invite Account Designees. The main content area features the title 'WCMSAP' and a paragraph explaining the portal's purpose: 'The WCMSAP provides an interface for entry of Workers' Compensation Set-Aside (WCMSA) proposals. You may use this site to enter the case information directly. The site also provides the ability to track submitted cases and the statuses without inquiry to BCRC or CMS. Case Lookup and View Alert functions are also available. Click the desired link below to perform that function.' Below this, there is a section titled 'I'd like to...' with links for 'Create a New Case', 'Case Lookup', and 'View Alerts'. On the right side, there are two boxes: 'QUICK HELP' with a link to 'Help About This Page', and 'Account Settings' with links for 'Update Account Information', 'Designee Maintenance', and 'View Account Activity'. The footer contains links for 'CMS/HHS Vulnerability Disclosure Policy', 'Privacy Policy', 'User Agreement', and 'Adobe Acrobat'.

## Slide notes

The How To section provides detailed information on performing the following functions:

- “Getting Started”,
- “Requesting your Login ID”,
- “Requesting your Password”,
- “Changing your Password”,
- “Resetting your PIN”,
- “Changing your Authorized Representative”,
- “Changing Your Account Manager”, and
- “Inviting Account Designees”.

Slide 7 of 29 - Reference Materials

The screenshot shows the 'Workers' Compensation Set-Aside Web Portal' with the 'Reference Materials' menu item highlighted in red. Below the menu, a dropdown menu is visible with the link 'WCMSAP site User Manual'. 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. Case Lookup and View Alert functions are also available. Click the desired link below to perform that function.' Below this paragraph, it states 'You may modify Account Settings by clicking the appropriate link under the Account Settings list.' To the right, there are two boxes: 'QUICK HELP' with a link 'Help About This Page' and 'Account Settings' with links 'Update Account Information', 'Designee Maintenance', and 'View Account Activity'. At the bottom, there is a footer with links for 'CMS/HHS Vulnerability Disclosure Policy', 'Privacy Policy', 'User Agreement', and 'Adobe Acrobat'.

Slide notes

Reference Materials provides a link to the WCMSAP site User Manual.

## Slide 8 of 29 - Contact Us

The screenshot shows the 'Contact Us' page of the Workers' Compensation Set-Aside Web Portal. The page features a navigation bar with links for Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us (highlighted), and Logoff. A 'Skip Navigation' link is also present. The main content area is titled 'WCMSAP' and contains the following text: 'The WCMSAP provides an interface for entry of Workers' Compensation Medicare Set-Aside (WCMSA) proposals. You may use this site to enter the case information directly. The site also provides the ability to track submitted cases and the statuses without inquiry to BCRC or CMS. Case Lookup and View Alert functions are also available. Click the desired link below to perform that function. You may modify Account Settings by clicking the appropriate link under the Account Settings list.' Below this text are three links: 'I'd like to...', 'Create a New Case', 'Case Lookup', and 'View Alerts'. On the right side, there are two boxes: 'QUICK HELP' with a link to 'Help About This Page', and 'Account Settings' with links for 'Update Account Information', 'Designee Maintenance', and 'View Account Activity'. The footer contains links for 'Privacy Policy', 'User Agreement', and 'Adobe Acrobat'.

## Slide notes

Contact Us displays a message which includes information on how to contact the Benefits Coordination & Recovery Center (BCRC).

\*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

If you have a program or technical problem involving your Section 111 data exchange, the first person to contact is your own EDI representative. Your EDI Representative should always be sought out first to help you find solutions for any questions, issues, or problems you have.

If you have not yet been assigned an EDI Representative, please call the EDI Department number at 646-458-6740 for assistance.

## Slide 9 of 29 - Quick Help

The screenshot displays the 'Workers' Compensation Set-Aside Web Portal' interface. At the top, there are logos for CMS (Center for Medicare & Medicaid Services) and COB&R (Coordination of Benefits and Recovery). A navigation bar includes links for Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Logoff, along with a 'Skip Navigation' link. The main content area is titled 'WCMSAP' and contains a paragraph explaining the system's purpose: 'The WCMSAP provides an interface for entry of Workers' Compensation Medicare Set-Aside (WCMSA) proposals. You may use this site to enter the case information directly. The site also provides the ability to track submitted cases and the statuses without inquiry to BCRC or CMS. Case Lookup and View Alert functions are also available. Click the desired link below to perform that function.' Below this, it states: 'You may modify Account Settings by clicking the appropriate link under the Account Settings list.' A section titled 'I'd like to...' lists three links: 'Create a New Case', 'Case Lookup', and 'View Alerts'. On the right side, there are two highlighted 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', 'Designee Maintenance', and 'View Account Activity'. At the bottom, a footer contains links for 'CMS/HHS Vulnerability Disclosure Policy', 'Privacy Policy', 'User Agreement', and 'Adobe Acrobat'.

## Slide notes

Users can select Quick Help to obtain access to online help documentation.

Users may also view/modify Account Settings. Access to the Account Settings functions is limited by user role (i.e., whether or not the user is set up as the Account Manager or the Account Designee).

For more information on the various Account Settings, see the [Login and User Maintenance](#) and [Basic Functions-Account Manager](#) CBT's.

## Slide 10 of 29 - Users of WCMSAP

The screenshot displays the WCMSAP web portal. At the top, there are logos for CMS (Center for Medicare & Medicaid Services) and COB&R (Coordination of Benefits and Recovery). The main title is "Workers' Compensation Set-Aside Web Portal". A navigation bar includes links for Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Logoff. A "Skip Navigation" link is also present. The main content area is titled "WCMSAP" and contains a paragraph explaining the portal's purpose: "The WCMSAP provides an interface for entry of Workers' Compensation Medicare Set-Aside (WCMSA) proposals. You may use this site to enter the case information directly. The site also provides the ability to track submitted cases and the statuses without inquiry to BCRC or CMS. Case Lookup and View Alert functions are also available. Click the desired link below to perform that function." Below this, it states: "You may modify Account Settings by clicking the appropriate link under the Account Settings list." To the right, there are two boxes: "QUICK HELP" with a link "Help About This Page", and "Account Settings" with links "Update Account Information", "Designee Maintenance", and "View Account Activity". A red-bordered box on the left is titled "I'd like to..." and contains links "Create a New Case", "Case Lookup", and "View Alerts". The footer contains links for "CMS/HHS Vulnerability Disclosure Policy", "Privacy Policy", "User Agreement", and "Adobe Acrobat".

## Slide notes

Users of the WCMSAP can access and make changes to cases associated to their assigned Account ID(s). Account Managers have access to all associated cases, while Account Designees' case access is controlled by the Account Manager.

Case management is handled using the following functions:

- Create a New Case,
- Case Lookup, and
- View Alerts.

Slide 11 of 29 - Create a New Case Link

The screenshot displays the 'Workers' Compensation Set-Aside Web Portal'. At the top left is the CMS logo (Center for Medicare & Medicaid Services). At the top right is 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. A 'Skip Navigation' link is also present. The main content area is titled 'WCMSAP' and contains a paragraph explaining the system's purpose: 'The WCMSAP provides an interface for entry of Workers' Compensation Medicare Set-Aside (WCMSA) proposals. You may use this site to enter the case information directly. The site also provides the ability to track submitted cases and the statuses without inquiry to BCRC or CMS. Case Lookup and View Alert functions are also available. Click the desired link below to perform that function.' Below this is another paragraph: 'You may modify Account Settings by clicking the appropriate link under the Account Settings list.' To the right, there are two boxes: 'QUICK HELP' with a link 'Help About This Page', and 'Account Settings' with links 'Update Account Information', 'Designee Maintenance', and 'View Account Activity'. Under the heading 'I'd like to...', there are three links: 'Create a New Case' (highlighted with a red box), 'Case Lookup', and 'View Alerts'. The footer contains links for 'CMS/HHS Vulnerability Disclosure Policy', 'Privacy Policy', 'User Agreement', and 'Adobe Acrobat'.

Slide notes

Use the Create a New Case link to input Workers' Compensation Medicare Set-Aside case information and all relevant documentation.

Slide 12 of 29 - New Case Creation Page

**Workers' Compensation Set-Aside Web Portal**

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

### New Case Creation

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

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

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

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

An asterisk (\*) indicates a required field.

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

Medicare ID: \*  OR SSN: \*  -  -

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

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

Last Name: \*  First Name: \*  MI:

Gender: \* -Select-

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

Proposed Settlement Amount: \* \$  ,

Slide notes

When the Create a New Case link is selected, the New Case Creation page will appear.

The data entered on this screen will be used to verify that the case meets all new case requirements (e.g., a duplicate case does not already exist and that the proposed settlement amount is not under the threshold amount).

From the New Case Creation page, users can select Cancel or Continue. Cancel will return you to the Home page. The information entered will not be saved.

Continue will save your changes and take you to the Beneficiary/Claimant Information page if the case meets the minimum requirements.

## Slide 13 of 29 - Case Information Tabs

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

## Case Information

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

Notes Documents \* Summary

### Beneficiary/Claimant Information

A superscript <sup>(1)</sup> indicates a field required for submission.

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

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

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

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

## Slide notes

The WCMSAP uses the following tabbed pages to store information related to the WCMSA case:

- Beneficiary/Claimant,
- WCMSA Administrator,
- Diagnosis Codes,
- Medical,
- Prescriptions,
- Workers' Compensation (WC) Carrier,
- Employer,
- Attorney,
- Notes,
- Documents, and
- Summary.

Tabs denoted with an asterisk indicate that data is required to be entered for that page.

For additional information on WCMSAP case creation, see the [Case Submission](#) CBT.

Slide 14 of 29 - Case Information Page - WCMSA Administrator Tab

Slide notes

As part of the new case creation process, you are required to identify the administrator of the WCMSA. The default option is 'Self'. A self-administrator is a Medicare beneficiary who is administering their WCMSA on their own behalf. The Rep Payee option is for non-corporate entities who are administering the WCMSA on behalf of a beneficiary.

The Professional Administrator option means that a professional entity will administer and account for the WCMSA that was established to protect Medicare's interests. Click Continue to proceed or save the case as a work-in-progress.

\*Note: When the Administrator Type is 'Professional Administrator', a copy of the Professional Administrator Agreement is required before you can submit this case. You can upload this document on the Documents tab. For additional information on WCMSAP case creation, see the [Case Submission](#) CBT.

Slide 15 of 29 - Case Lookup Link

The screenshot displays the 'Workers' Compensation Set-Aside Web Portal'. At the top left is the CMS logo (Center for Medicare & Medicaid Services). At the top right is 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. A 'Skip Navigation' link is also present. On the right side, there are two boxes: 'QUICK HELP' with a link to 'Help About This Page', and 'Account Settings' with links for 'Update Account Information', 'Designee Maintenance', and 'View Account Activity'. The main content area is titled 'WCMSAP' and contains text explaining the system's purpose and how to use it. Below this text, under the heading 'I'd like to...', there are three links: 'Create a New Case', 'Case Lookup' (which is highlighted with a red box), and 'View Alerts'. At the bottom of the page, there is a footer with links for 'CMS/HHS Vulnerability Disclosure Policy', 'Privacy Policy', 'User Agreement', and 'Adobe Acrobat'.

Slide notes

The Case Lookup function is used to access and make changes to cases under an assigned Account ID(s). When a user clicks on the Case Lookup link, the Case Lookup screen will display.

### Slide 16 of 29 - Narrowing Search Results

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

## Case Lookup

You can access Workers' Compensation Medicare Set-Aside (WCMSA) cases that have been submitted through the Web portal and are associated with your Login ID using various search criteria.

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

Enter the search criteria in the provided fields and click 'Search.' Selecting 'Cancel' will return you to the Home page.

**Helpful Hints:**

- WIP cases do not have a Submission Date
- Date Range is limited to a maximum of six months

All Cases (Both submitted and WIP cases)  
 Submitted Cases Only  
 WIP Cases Only

Enter one of the following:

Case Control Number:

Medicare ID:  OR SSN:

Date Range:

Case Creation Date Range:

From Date:  /  /  To Date:  /  /

Case Submission Date Range:

From Date:  /  /  To Date:  /  /

### Slide notes

From this page, users may access cases that are associated with their Login ID using various user-specified criteria.

The fields on this page can be used to narrow search results.

Case listings may be requested for all cases (both submitted cases and work-in-progress (WIP) cases), submitted cases only, or work-in-progress cases only.

### Slide 17 of 29 - Optional Fields

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

## Case Lookup

You can access Workers' Compensation Medicare Set-Aside (WCMSA) cases that have been submitted through the Web portal and are associated with your Login ID using various search criteria.

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

Enter the search criteria in the provided fields and click 'Search.' Selecting 'Cancel' will return you to the Home page.  
**Helpful Hints:**

- WIP cases do not have a Submission Date
- Date Range is limited to a maximum of six months

All Cases (Both submitted and WIP cases)  
 Submitted Cases Only  
 WIP Cases Only

Enter one of the following:

Case Control Number:

Medicare ID:  OR SSN: --

Date Range:

Case Creation Date Range:

From Date:  /  /  To Date:  /  /

Case Submission Date Range:

From Date:  /  /  To Date:  /  /

### Slide notes

The remaining fields are all optional but can also be used to narrow down the search results. Please see the [Case Lookup](#) CBT for more information on the Case Lookup function.

## Slide 18 of 29 - Viewing Alerts

The screenshot displays the WCMSAP web portal. At the top, there are logos for CMS (Center for Medicare & Medicaid Services) and COB&R (Coordination of Benefits and Recovery). The main title is "Workers' Compensation Set-Aside Web Portal". 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. On the right side, there is a "QUICK HELP" section with a link to "Help About This Page" and an "Account Settings" section with links for "Update Account Information", "Designee Maintenance", and "View Account Activity". The main content area is titled "WCMSAP" and contains text explaining the portal's purpose: "The WCMSAP provides an interface for entry of Workers' Compensation Medicare Set-Aside (WCMSA) proposals. You may use this site to enter the case information directly. The site also provides the ability to track submitted cases and the statuses without inquiry to BCRC or CMS. Case Lookup and View Alert functions are also available. Click the desired link below to perform that function." Below this text, it states: "You may modify Account Settings by clicking the appropriate link under the Account Settings list." Under the heading "I'd like to...", there are three links: "Create a New Case", "Case Lookup", and "View Alerts". The "View Alerts" link is highlighted with a red rectangular box. At the bottom of the page, there is a footer with links for "CMS/HHS Vulnerability Disclosure Policy", "Privacy Policy", "User Agreement", and "Adobe Acrobat".

## Slide notes

The View Alerts function is used to access alerts for a WCMSA case.

After cases have been submitted, the Workers' Compensation Recovery Center (WCRC) reviews each case for completeness and accuracy. If errors have been found in a submitted case, the WCRC sends an alert email to the email address provided during account setup.

The alert email will contain the case number and the type of error found.

Most alerts are informational; however, some require action on the case. Users must read the alert and respond if necessary.

Slide 19 of 29 - Alert Fields

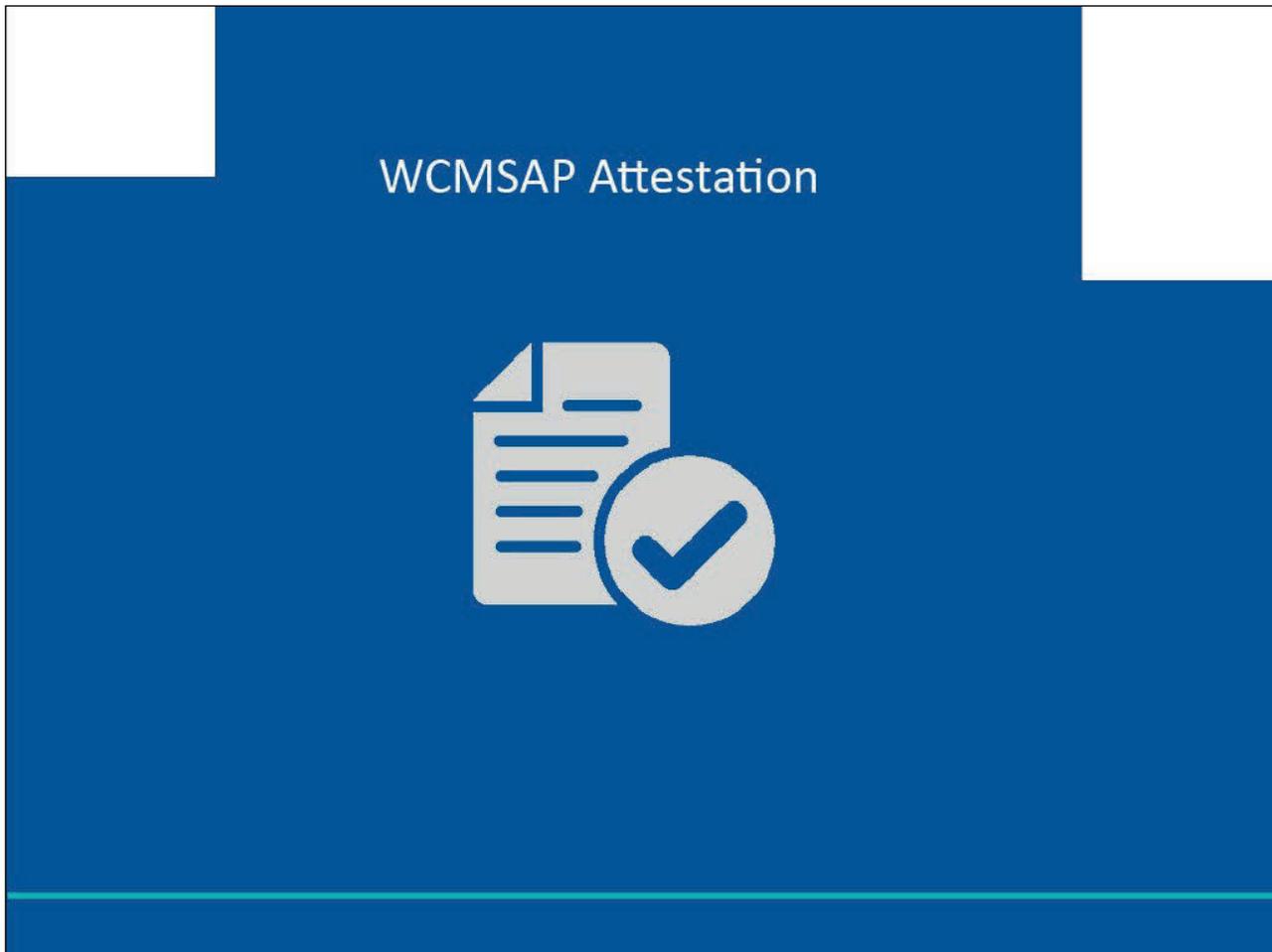
Alert ID	Alert Creation Date	Alert Type	Case Number	Creator	Status	Medicare ID/SSN	Bene Name
364116	01/24/2024	Commingled Follow-up	WC1123400010186	WCSA	Not Read	*****9555A	HIEN VO
163	02/14/2011	Closeout	WC1103900010517	WCSA	Not Read	*****2013A	MARY JONES
161	02/14/2011	Commingled	WC1103900010518	WCSA	Read	*****-8155	JOHN SMITH
143	02/09/2011	Development	WC1103900010519	WCSA	Read	*****-9474	GLORIA MAINE
125	02/08/2011	Under Threshold	WC1103900010420	WCSA	Read	*****-3214	JAMES DOE

Slide notes

The Alerts page will appear. By default, this page will list all the alerts for the previous 60 days that are associated with the Account ID(s) the user registered under. Users can use the fields on the page to limit the alerts that are displayed. Users have two options for viewing Alerts. They may click the Alert ID number link which will display the specific alert or letter on the Alert Detail page. They may also click a Case Number link which will display all alerts for the selected case on the Alert Listing page. Please see the [Alerts](#) CBT for additional information on the various alerts that may be received for a case on the WCMSAP.

Note: A new WCMSAP Commingled Follow-up alert has been added to allow the WCRC to mark a case as comingled up to four times per review session. Also, a new letter/alert (using a separate template with different verbiage than the existing commingled letter/alert) will be automatically sent to submitters (using the same CC rule as the existing commingled letter/alert) after the second instance of commingling within the same WCRC review session.

**Slide 20 of 29 - WCMSAP Attestations**



**Slide notes**

When beneficiaries access their account from Medicare.gov., they will be taken directly to the Case Documentation Page.

Slide 21 of 29 - Case Documentation Page

The screenshot shows a web application interface for Case Documentation. At the top is a navigation bar with links: Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Logoff. A 'Skip Navigation' link is also present. Below the navigation bar is the page title 'Case Documentation'. The main content area displays case information: 'Smith, John', 'Medicare ID: 123456789A', and 'Case ID: XXXXXX'. To the right is a 'QUICK HELP' box with a link 'Help About This Page'. Below the case information is a paragraph explaining that the page shows documentation submitted for the selected case and provides instructions on how to search for documents. Below this is a search section with 'From Date' and 'To Date' fields (format MM/DD/CCYY) and 'Search' and 'Clear' buttons. At the bottom is a table with two columns: 'Document Category' and 'Creation Date'. The table contains six rows of document categories and their respective 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

Slide notes

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

This page displays all documentation submitted for the selected case/ Select the case link to view the document. To select another case, use the Case Listing button to view your case list. You can also use the WCMSA Attestation Information to view your WCMSA balance or submit your yearly attestation.

Note: Beneficiaries, when logged into Medicare.gov, will now have read-only access in the WCMSAP to the documentation received for non-portal cases after the files have been marked as reviewed and not commingled.

Slide 22 of 29 - Case Listing Page

The screenshot shows the 'Case Listing' page for user John Smith. At the top, there are logos for CMS (Center for Medicare & Medicaid Services) and COB&R (Coordination of Benefits and Recovery). A navigation bar includes links for Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Logoff. A 'Skip Navigation' link is also present. The main heading is 'Case Listing'. Below this, the user's name 'Smith, John' is displayed. A 'QUICK HELP' box contains a link to 'Help About This Page'. A descriptive paragraph states: 'This page lists all submitted Workers' Compensation Medicare Set-Aside cases that are associated with you. If documentation is available to view for a case, you can select the Case Number to see documents submitted for the case. Selecting "Logoff" will sign you out of this session.' A table with the following data is shown:

Case Number	Date of Injury	Case Status	Case Location	Submission Date
<a href="#">WC123456</a>	01/19/2010	Received	WCRC	02/23/2010
<a href="#">WC798654</a>	11/17/2009	Received	WCRC	12/05/2009

At the bottom of the page, there is a footer with links for CMS/HHS Vulnerability Disclosure Policy, Privacy Policy, User Agreement, and Adobe Acrobat.

Slide notes

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

Slide 23 of 29 - WCMSA Account Balance and Attestation Submission Page

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## WCMSA Account Balance and Attestation Submission

[Top of the Attestation Page](#) **QUICK HELP**  
[Help About This 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. Individuals who have a CMS-approved WCMSA as part of a workers' compensation settlement agreement may only use the funds in the WCMSA account to pay for Medicare-covered medical services and Medicare-covered prescription drug expenses that are related to their workers' compensation injury, illness, or disease.

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

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

Case ID: WC123456	Medicare ID: 123456A	Payout Schedule: 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		

Payment	Amount	Payment Date
1	5833.33	6/1/2017
2	5833.33	6/1/2018
3	5833.33	6/1/2019
4	5833.33	7/1/2019
5	5833.33	8/1/2019

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

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

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

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

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

Slide notes

If you select the WCMSA Attestation Information from the Case Information screen, you will be taken to the WCMSA Account Balance and Attestation Submission page.

Every year, no later than 30 days after the anniversary date of your Worker's Compensation settlement, the administrator of the WCMSA funds must send an attestation to Medicare's Benefits Coordination Recovery Center (BCRC) stating that the funds in the account have been used correctly.

Slide 24 of 29 - Attestation Page Cont.

Name: GDIT Corp	Date of Injury: 4/12/2019	<table border="1"> <thead> <tr> <th>Payment</th> <th>Amount</th> <th>Payment Date</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>5833.33</td> <td>6/1/2017</td> </tr> <tr> <td>2</td> <td>5833.33</td> <td>6/1/2018</td> </tr> <tr> <td>3</td> <td>5833.33</td> <td>6/1/2019</td> </tr> <tr> <td>4</td> <td>5833.33</td> <td>7/1/2019</td> </tr> <tr> <td>5</td> <td>5833.33</td> <td>8/1/2019</td> </tr> </tbody> </table>	Payment	Amount	Payment Date	1	5833.33	6/1/2017	2	5833.33	6/1/2018	3	5833.33	6/1/2019	4	5833.33	7/1/2019	5	5833.33	8/1/2019
Payment	Amount		Payment Date																	
1	5833.33		6/1/2017																	
2	5833.33		6/1/2018																	
3	5833.33		6/1/2019																	
4	5833.33	7/1/2019																		
5	5833.33	8/1/2019																		
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																				

Bottom of the Attestation Page

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](#)

Slide notes

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

Slide 25 of 29 - WCMSA Attestation Submission Verification Page

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

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### WCMSA Attestation Submission Verification

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

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

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

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

**Slide notes**

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

Slide 26 of 29 - WCMSA Attestation Submission Confirmation Page

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

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### WCMSA Attestation Submission Confirmation

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

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

[Continue](#)

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

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

Slide notes

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

Slide 27 of 29 - Course Summary

## Course Summary

You are now able to:

- Navigate the WCMSAP
- Discuss menu options within the WCMSAP
- Complete the Yearly Attestation Information



### Slide notes

You are now able to:

- Navigate the WCMSAP,
- Discuss menu options within the WCMSAP, and
- Complete the Yearly Attestation Information.

**Slide 28 of 29 - Conclusion**



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

Slide 29 of 29 - 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).