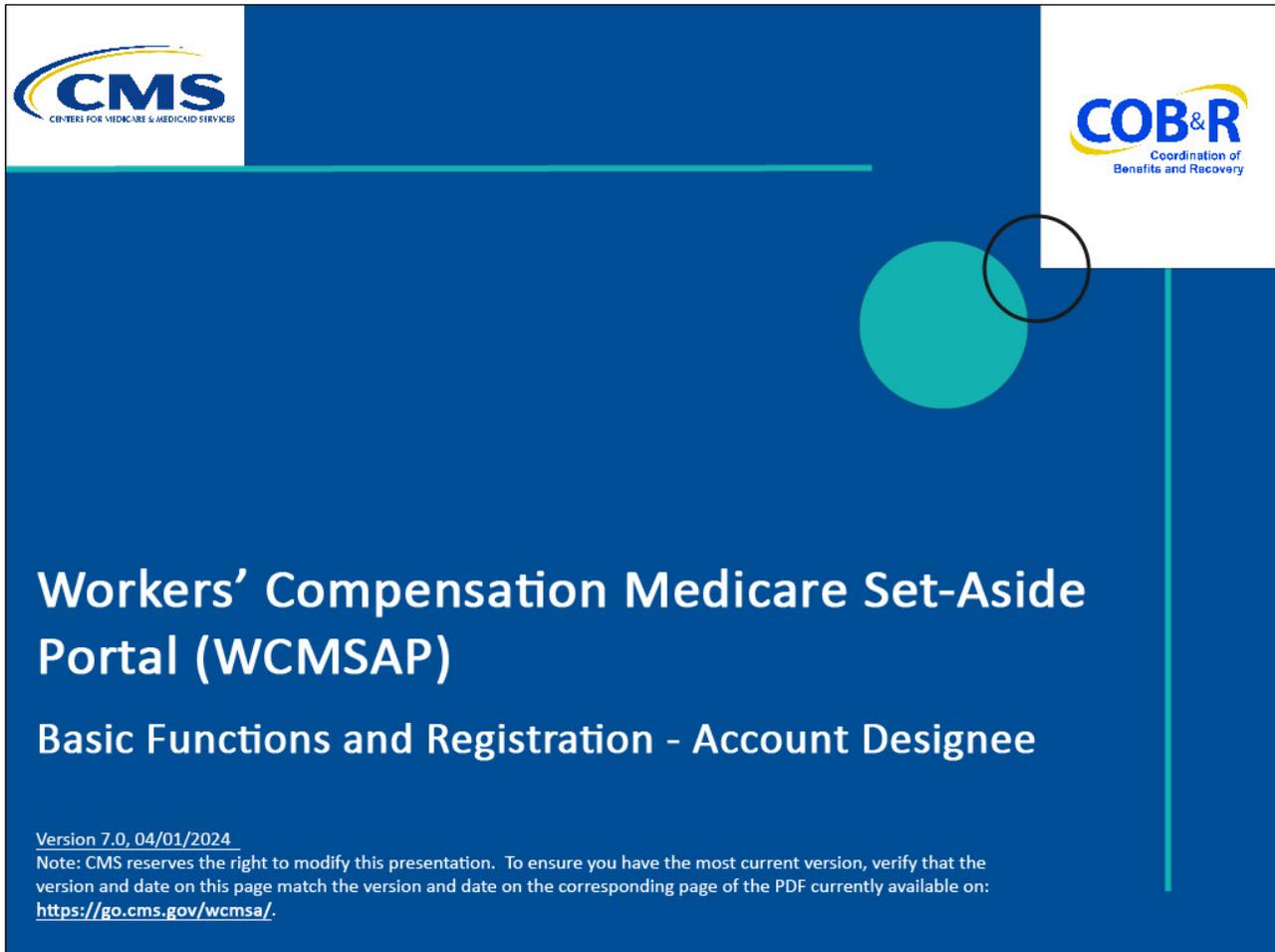


Basic Functions and Registration - Account Designee

Slide 1 of 22 - Basic Functions and Registration - Account Designee



The slide features a dark blue background. In the top left corner is the CMS logo (Centers for Medicare & Medicaid Services). In the top right corner is the COB&R logo (Coordination of Benefits and Recovery). A large teal circle is positioned on the right side, partially overlapping the COB&R logo. A thin teal vertical line runs down the right edge of the slide.

Workers' Compensation Medicare Set-Aside Portal (WCMSAP)

Basic Functions and Registration - Account Designee

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) Basic Functions & Registration - Account Designee course.

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

Slide 3 of 22 - Course Overview

Course Overview

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

- Explain the role of the Account Designee
- Discuss the basic functions of the Account Designee
- Complete registration as the Account Designee



Slide notes

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

- Explain the role of the Account Designee,
- Discuss the basic functions of the Account Designee, and
- Complete registration as the Account Designee.

Slide 4 of 22 - Account Designee Role

Account Designee - Role

Account Manager	Account Designee
May invite Account Designees to have access to the WCMSAP for the Account Manager's account	May assist Account Manager in managing specific account



Slide notes

An Account Manager for Corporate or Representative Account types may invite other individuals, known as Account Designees, to have access to the WCMSAP for the Account Manager's account.

Corporate accounts may have up to 20 Account Designees associated with one WCMSAP account; Representative accounts may have up to 5. Account Designees may assist the Account Manager in managing a specific account.

Note: The Account designee can also be an Account Manager for other accounts. You can also change an Account Designee into an Account Manager by calling your EDI Representative.

Slide 5 of 22 - Basic Functions

Account Designee - Basic Functions

Account Designee can (to their associated account)	Account Designee cannot
<ul style="list-style-type: none">• Be associated with multiple WCMSAP accounts (if invited by Account Manager)• Change personal information• Submit new cases• Perform case lookups and view cases• Update a case (including appending documentation)• Replace documentation• Access alerts• Update work-in-progress information	<ul style="list-style-type: none">• Be an Account Representative for any WCMSAP account• Be the Account Manager for the same WCMSAP account• Invite other users to the WCMSAP account• Update WCMSAP account information

Slide notes

Account Designees can be associated with multiple WCMSAP accounts but only if invited by the Account Manager for those accounts. They are able to:

Change their personal information on the WCMSAP;

Submit new cases for a given WCMSAP account;

Perform case lookups and view cases with which they are associated (cases submitted by the Account Designee or assigned to them by the Account Manager);

Update (append documentation too) a case that they have been associated with;

Replace documentation for cases that they have been associated with;

Access alerts for cases that they have been associated with; and

Update work-in-progress case information for cases that they have created or are associated with, as assigned by the Account Manager.

Account Designees cannot be an Account Representative for any WCMSAP account, be the Account Manager for the same WCMSAP account, invite other users to the WCMSAP account, or update WCMSAP account information.

Slide 6 of 22 - Account Designee Registration

Account Designee - Registration

Account Designees are required to register once on the WCMSAP and obtain a Login ID and Password

Account Designee will begin by clicking URL in invitation email from cobva@ghimedicare.com

- Email contains specific token link
- Token link becomes inactive after 30 days of non-use
- Will also need Passphrase from Account Manager

Slide notes

Account Designees are required to register on the WCMSAP and obtain a Login ID and Password before they can use the system.

The Account Designee will only register once.

Only one Login ID is needed no matter how many account IDs they will ultimately be associated with.

The Account Designee will begin the registration process by clicking on the URL in the invitation email that was sent by the Benefits Coordination & Recovery Center (BCRC).

The email will come from cobva@ghimedicare.com.

Ensure that your spam filter software has been updated to allow receipt from this email address.

The URL in this email contains a specific token which grants access to the registration site.

The token link becomes inactive after 30 days of non-use, so it is imperative that the Account Designee registers as soon as possible after receiving the invitation email.

Slide 7 of 22 - Login Warning

The screenshot shows a web page titled "Login Warning" with a "Print this page" link. The main heading is "UNAUTHORIZED ACCESS TO THIS COMPUTER SYSTEM IS PROHIBITED BY LAW". Below this, there are several paragraphs of text: a notice about privacy and security, a statement that unauthorized use is prohibited, a limitation on social media use, and a consent statement. Three bullet points follow, detailing expectations of privacy and government monitoring. A URL is provided: <http://www.cms.hhs.gov/About-CMS/Agency-Information/Aboutwebsite/Security-Protocols.html>. There are three more sections: "Privacy Act Statement" (authorizing collection of information for Medicare), "Attestation of Information" (a declaration of truthfulness), and a "LOG OFF IMMEDIATELY" instruction. At the bottom, there are two links: "I Accept" and "Decline".

Slide notes

Once the URL in the invitation email has been clicked, the Login Warning page will appear, detailing the Data Use Agreement (DUA).

The DUA provides information about WCMSAP security measures including access, penalty and privacy laws.

All users must agree to the terms of this warning each time they access the WCMSAP application.

Slide 8 of 22 - Login Warning

[Login Warning](#)  [Print this page](#)

UNAUTHORIZED ACCESS TO THIS COMPUTER SYSTEM IS PROHIBITED BY LAW

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

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

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

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

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

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

Privacy Act Statement

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

Attestation of Information

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

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

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

[Decline](#)

Slide notes

Users must review the DUA and click the [I Accept] link at the bottom of the page to continue otherwise they will be denied access to the WCMSAP site and will be unable to register.

Slide 9 of 22 - Designee Registration

The screenshot shows the 'Designee Registration' page. At the top, there are logos for CMS (Center for Medicare & Medicaid Services) and COB&R (Coordination of Benefits and Recovery), along with the title 'Workers' Compensation Set-Aside Web Portal'. A navigation bar includes links for 'About This Site', 'CMS Links', 'How To...', 'Reference Materials', and 'Contact Us', with a 'Skip Navigation' link on the right. The main heading is 'Designee Registration'. Below this, a message states: 'Manager listed below has invited you to be a Designee for the following account:'. To the right of this message is a box labeled 'The Account' and a 'QUICK HELP' button with a link 'Help About This Page'. The 'Submitter Information' section shows 'Submitter ID: 88888'. The 'Account Manager Information' section lists: 'First Name: Jane', 'Last Name: Smith', 'Phone: (555) 555-5555', and 'E-Mail: jane.smith@anycorp.com'. A paragraph explains that a Login ID and pass-phrase are needed, and provides instructions on what to do if the pass-phrase is not received. It also includes a link to the 'Workers' Compensation Medicare Set-Aside Welcome Page' at <https://www.imp.cob.cms.hhs.gov/WCMSA/>. There is a text input field for 'Enter the passphrase:'. A note states that the user must read and accept the User Agreement, with a link to 'View and print the agreement below'.

Slide notes

If the Account Designee accepts the terms of the Login Warning, the Designee Registration page will appear.

The Designee Registration page informs the user that they have been assigned as an Account Designee for the listed Account ID.

Slide 10 of 22 - Designee Registration

The screenshot shows the 'Designee Registration' 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 'Designee Registration'. Below this, a message states: 'Manager listed below has invited you to be a Designee for the following account:'. To the right of this message is a 'The Account' label and a 'QUICK HELP' button with a 'Help About This Page' link. The 'Submitter Information' section shows 'Submitter ID: 88888'. The 'Account Manager Information' section lists: 'First Name: Jane', 'Last Name: Smith', 'Phone: (555) 555-5555', and 'E-Mail: jane.smith@anycorp.com'. A paragraph explains that a Login ID and pass-phrase are needed, and provides instructions to contact the Account Manager if the pass-phrase is missing. It also provides a URL for already registered users: <https://www.imp.cob.cms.hhs.gov/WCMSA/>. A red-bordered box highlights the 'Enter the passphrase:' label and an empty text input field. Below this, there is a note about reading and accepting the User Agreement, and a link to 'View and print the agreement below'.

Slide notes

The Account Designee will enter the Passphrase given to them by the Account Manager.

Note: The Passphrase is case-sensitive. It must be entered exactly as it was given by the Account Manager.

Slide 11 of 22 - Review User Agreement

Account Manager Information

First Name: Jane Last Name: Smith
Phone: (555) 555-5555
E-Mail: jane.smith@anycorp.com

To set up a Login ID for you to act as a Designee, you will need the pass-phrase created by the Account Manager. If you do not have the pass-phrase, please contact the above Account Manager.

If you have already registered, please visit the Workers' Compensation Medicare Set-Aside Welcome Page at <https://www.imp.cob.cms.hhs.gov/WCMSA/> to login.

Enter the passphrase:

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) Se

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

Please check the following box:

I accept the User Agreement and Privacy Policy above

Slide notes

The Account Designee must review the User Agreement, check the box to accept the terms, and click Next to continue.

Slide 12 of 22 - Personal Information

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

[Skip Navigation](#)

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

Designee Personal Information

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: * ▼

Zip Code: * -

Slide notes

The Designee Personal Information page will appear. Enter the required information and click Next to continue. Note: Required fields are denoted by an asterisk (*).

Slide 13 of 22 - Designee Login Information

The screenshot shows the 'Designee Login Information' page. At the top, there are logos for CMS (Center for Medicare & Medicaid Services) and COB&R (Coordination of Benefits and Recovery). The page title is 'Workers' Compensation Set-Aside Web Portal'. A navigation bar 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 'Designee Login Information'. A 'QUICK HELP' box contains a link to 'Help About This Page'. The text explains that security information is required for authentication and provides a list of password requirements: 7-character unique IDs in AA999AA format, 60-day password rotation, 8-character passwords with uppercase, lowercase, numbers, and special characters, and 4-character changes from the previous password. Below this, a note states that an asterisk (*) indicates a required field. The form includes three input fields: 'Login ID *', 'Password *' (masked with dots), and 'Re-enter Password *'. A section for 'Security Questions' follows, with a dropdown menu for 'Security Question 1 *' currently set to 'Please Select'.

Slide notes

The Designee Login Information page will appear. The Account Designee must set up a Login ID and Password, and also select their Security Questions.

Slide 14 of 22 - Password

Designee Login Information

- Password
 - Must be changed every 60 days
 - Must be 8 characters in length
 - Must contain a mix of upper case letters, lower case letters, and numbers and a special character
 - Cannot be changed more than
 - Does not contain 4 consecutive characters from the previous password
 - Must be different from the last 6
 - Cannot contain reserved words

**Slide notes**

When choosing a password, ensure that:

Login IDs are 7 characters,

Login IDs are in the format of AA999AA (first two alphabetic, next three numeric, last two alphabetic),

Password is changed every 60 days,

Is 8 characters in length,

Contains at least one upper-case letter,

One lowercase letter,

one number,

One special character,

is not changed more than once per day,

Does not contain 4 consecutive characters from the previous password,

Is different from the last 6 Passwords, and
Does not contain a reserved word.

Slide 15 of 22 - Security Questions

[Skip Navigation](#)

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

Designee 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 an Account Designee.

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 uppercase letter, one lowercase 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 a reserved word (See Help About This Page for a complete list).

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 *

Slide notes

The Security Questions will be used to assist the Account Designee in regaining account access if they forget their password.

The answers provided to these questions should be actual answers and not hints for the password.

Enter all required information and then click Next to continue.

Note: Additional security questions have been added to the Forgot Login ID and Forgot Password processes.

Slide 16 of 22 - Designee Summary

[Skip Navigation](#)

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

Designee Summary

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 Registration' 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: Test MI: Last Name: ADTest
E-Mail Address: DesigneeTest@gmail.com
Phone: 580-580-5800 ext.

Login ID

Login ID: AT123AT

Mailing Address:

Address Line 1: 123 Test Ave
Address Line 2:
City: Durant
State: Oklahoma
Zip Code: 74701

Slide notes

The Designee Summary page will appear.

This page provides a summary of the information that has been entered during the Account Designee registration process.

Review this page for accuracy and completeness.

To make any corrections, click the Edit button next to the section that requires updates.

This action will return the user to the corresponding page.

Slide 17 of 22 - Updating Your Information

[Skip Navigation](#)

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

Designee Personal Information

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: * ▼

Zip Code: * -

Slide notes

Change any of the information as needed and click Next to navigate back to the Designee Summary page.

Slide 18 of 22 - Designee Summary

[Skip Navigation](#)

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

Designee Summary

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 Registration' 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: Amanda MI: Last Name: ADTest
E-Mail Address: DesigneeTest@gmail.com
Phone: 580-580-5800 ext.

Login ID

Login ID: AT123AT

Mailing Address:

Address Line 1: 123 Test Ave
Address Line 2:
City: Durant
State: Oklahoma
Zip Code: 74701

Slide notes

When all information has been verified for accuracy and completeness, click Submit Registration.

Slide 19 of 22 - Designee Thank You

The screenshot shows the 'Designee 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 'Designee Thank You'. Below the heading, a message states: 'You have successfully completed registration for the Workers' Compensation Set-Aside Web site and established yourself as a Designee for the Account ID. Please print this page for your records.' A 'Print this page' icon is provided. To the right, a 'QUICK HELP' box contains a link for 'Help About This Page'. Under the heading 'Next Steps', the text reads: 'You may now return to the Workers' Compensation Set-Aside Web site welcome page, login using the Login ID and Password you just created to access accounts associated with your ID.' A link is provided: 'You can visit the Workers' Compensation Medicare Set-Aside Welcome Page at <https://www.imp.cob.cms.hhs.gov/WCMSA/>'.

Slide notes

The Designee Thank You page will appear stating that the Account Designee has been successfully registered on the WCMSAP.

Click the Workers' Compensation Medicare Set-Aside Welcome page link to go to the WCMSAP Welcome page to log in to the site and manage account information.

Slide 20 of 22 - Course Overview

Course Summary

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

- Explain the role of the Account Designee
- Discuss the basic functions of the Account Designee
- Complete registration as the Account Designee



Slide notes

You should now be able to:

- Explain the role of the Account Designee,
- Discuss the basic functions of the Account Designee, and
- Complete registration as the Account Designee.

Slide 21 of 22 - Conclusion



You have completed the WCMSAP Basic Functions and Registration 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 Basic Functions and Registration 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 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:
[https://www.surveymonkey.com/s/WCMSAPTraining.](https://www.surveymonkey.com/s/WCMSAPTraining)