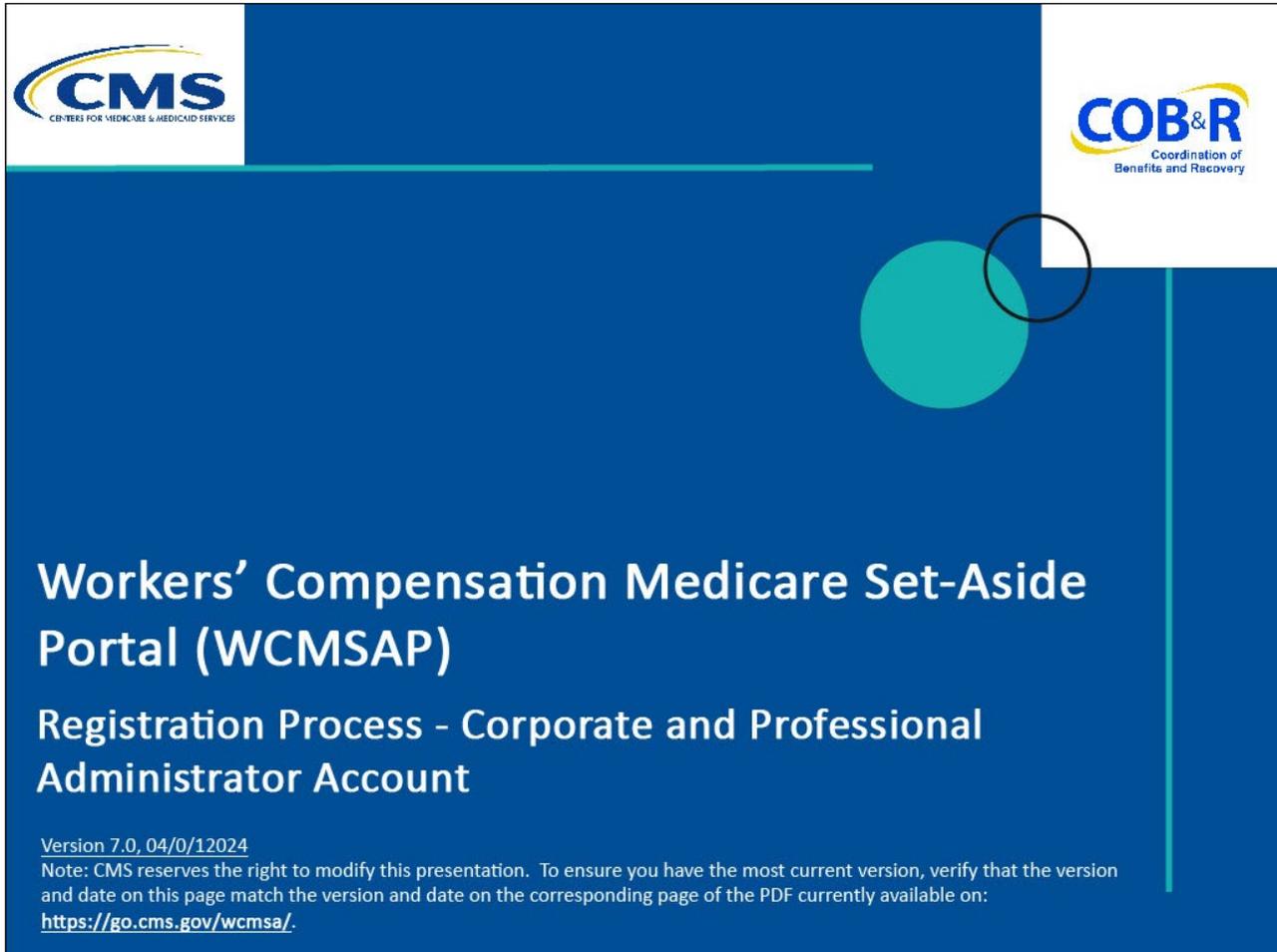## Registration Process- Corporate and Professional Administrator Account

Slide 1 - of 41 Registration Process- Corporate and Professional Administrator Account

Slide notes

Welcome to the Workers' Compensation Medicare Set-Aside Portal (WCMSAP) Registration Process for Corporate and Professional Administrator Account course.

Slide 2 - of 41 - 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: CMS WCMSAP Website.

Slide 3 - of 41 - Course Overview

Course Overview

- Corporate Registration

- Professional Administrator Registration

- Next Steps

Slide notes

This course will provide instruction on how to complete a Corporate and Professional Administrator registration on the WCMSAP and the steps to follow once the registration has been submitted.

Slide 4 - of 41 - Getting Started

Slide notes

Users must be authorized to access the WCMSAP.

Before a new user can become authorized, the corporate or professional administrator entity must complete the registration process which involves the following steps:

- New Registration
- Account Setup

New Registration must be completed by the person named as the Account Representative. Account Setup must be completed by the person named as the Account Manager.

Note: The focus of this CBT is on the New Registration process.

For more information on Account Setup, please see the Corporate and Professional Administrator Account Setup CBT.

Slide 5 - of 41 - Account Representative

Slide notes

To begin the New Registration, the corporate entity must identify their Account Representative.

The Account Representative is the individual who has the legal authority to bind the company to a contract and the terms of WCMSAP requirements and processing.

Note: If the person named as the Account Representative needs to be changed after the registration has been completed, the Account Manager can make the change.

The Account Representative may also be associated with more than one account.

Slide 6 - of 41 - Account Representative Responsibilities
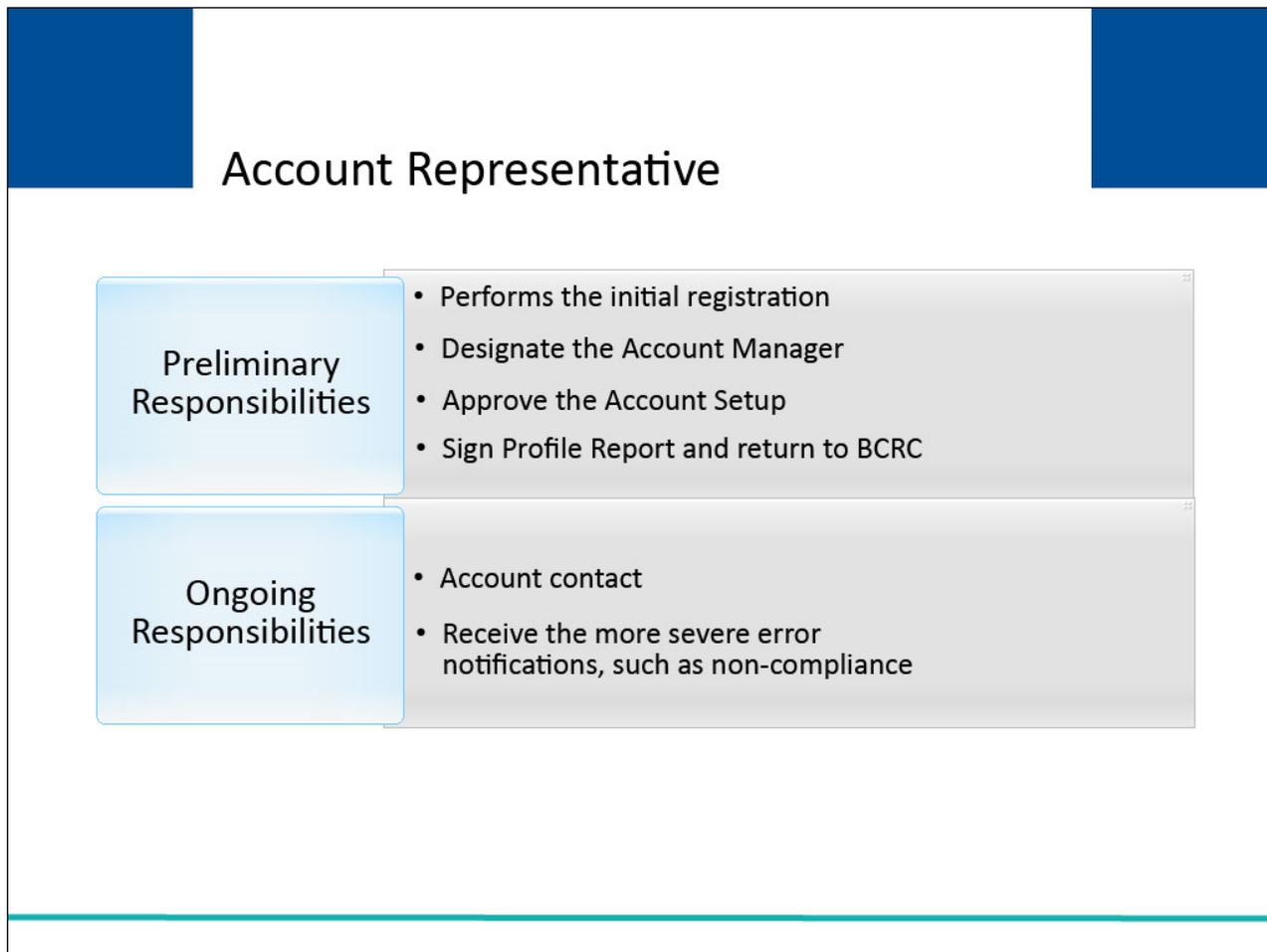
Slide notes

The Account Representative performs the New Registration on the WCMSAP and provides all of the information requested by the system.

This person is responsible for designating the Account Manager.

Additionally, the Account Representative must approve the Account Setup by physically signing the Profile Report and returning it to the Benefits Coordination and Recovery Center (BCRC).

The Account Representative will be the account contact and recipient of the more severe error notifications, such as non-compliance.

Slide 7 - of 41 - Account Representative

Slide notes

The Account Representative cannot be an actual user of the WCMSAP (i.e., cannot be the Account Manager or Account Designee) and cannot register as the Account Representative for more than one WCMSAP account.

Please note: Only those individuals who are assigned the role of an Account Manager or Account Designee can access and use the WCMSAP.

Slide 8 - of 41 - Account Manager and Account Designee

Slide notes

The Account Manager is assigned by the Account Representative. This individual will administer the account on the WCMSAP.

This includes submitting new cases, viewing, and updating cases, adding/replacing documentation, inviting others to assist (Account Designees), granting Designer account access to a case, and remove or revoke an AD's access to a case or account.

An Account Designee can perform similar functions as the Account Manager, but these individuals cannot modify WCMSAP account information or invite other users to assist.

Slide 9 - of 41 - WCMSAP URL

Slide notes

All users must register for a Web portal account on the WCMSAP URL. To create your corporate or professional administrator account, your Account Representative must go to the WCMSAP Website <https://www.cob.cms.hhs.gov/WCMSA/> to begin the registration process.

Slide 10 - of 41 - 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

Each time you visit the WCMSAP website, the Login Warning page will appear. 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 11 - of 41 - Login Warning Page

Slide notes

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 website and will be unable to register.

Slide 12 - of 41 - Welcome to the WCMSAP Page

Slide notes

Once you have clicked on the I Accept link, you will be brought to the Login/Welcome to the WCMSAP page. Here you will find various menu options.

Slide 13 - of 41 - About This Site

Slide notes

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

Slide 14 - of 41 - CMS Links

Slide notes

"CMS Links" provides links to the Workers' Compensation Agency Services page, the CMS.gov Medicare website, and the Coordination of Benefits & Recovery Overview website.

Slide 15 - of 41 - The How To Section

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 Account Representative
- Changing your Account Manager
- Inviting Account Designees

Slide 16 - of 41 - Reference Materials

Slide notes

"Reference Materials" provides a link to the WCMSAP User Guide.

Slide 17 - of 41 - Contact Us
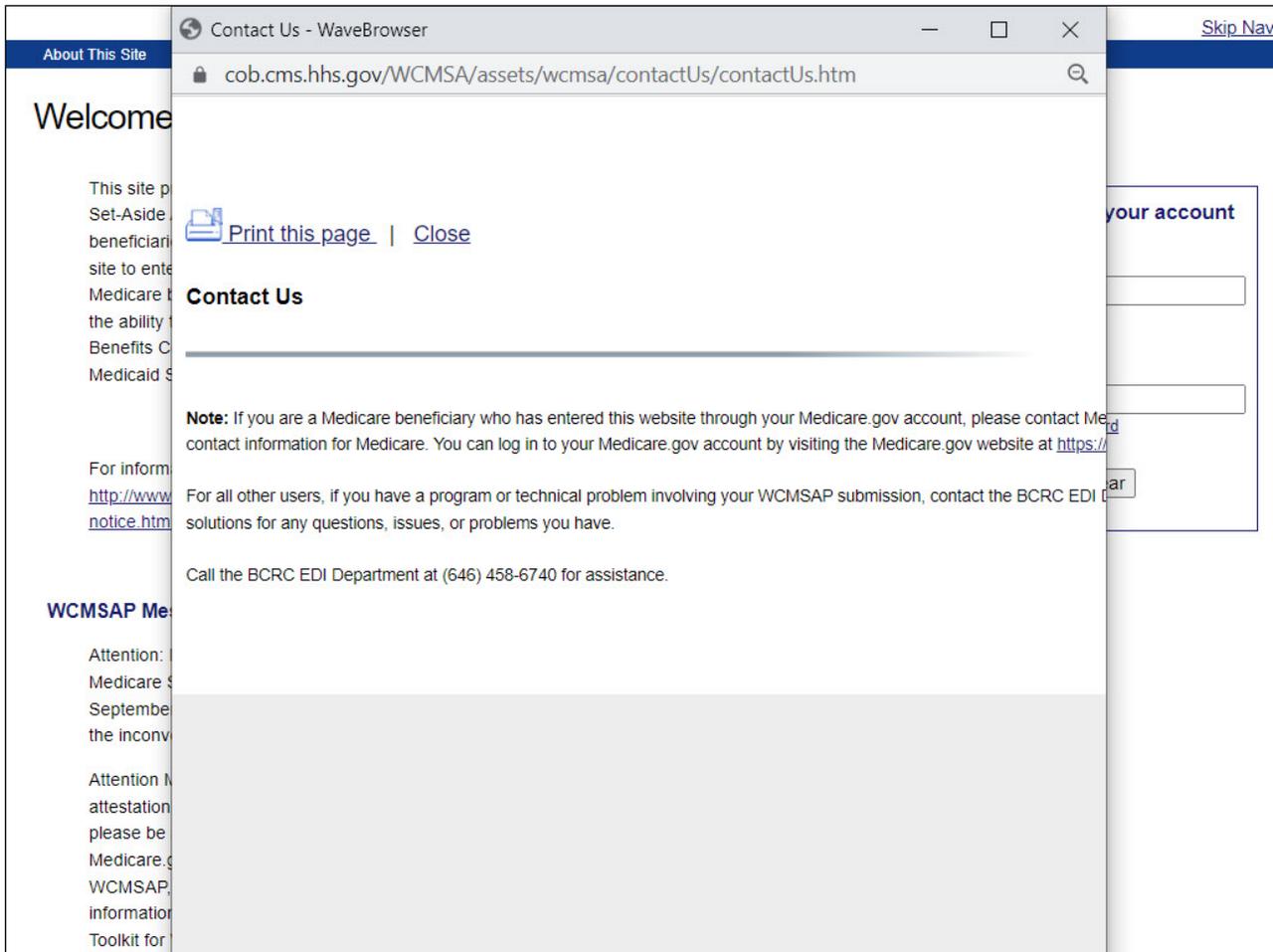
Slide notes

"Contact Us" displays the following message which provides information on how to contact the 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

Slide 18 - of 41 - New Registration Link

Slide notes

The first step in the WCMSAP registration process is Account Registration. During this step, basic information related to your company and your Account Representative are required.

To begin this process, your designated Account Representative must click the New Registration button.

Slide 19 - of 41 - Select Account Type Page

Slide notes

The Select Account Type page displays. This page describes the differences between each account type.

Slide 20 - of 41 - Account Type

Account Type

- Corporate
  - Corporate entity with an Employer Identification Number (EIN)
  - Will regularly submit WCMSAP requests
- Representative
  - Non-corporate WCMSAP submitter with no EIN
  - Will submit multiple cases
- Self
  - Medicare beneficiary/claimant
  - Submit a case for themselves
- Professional Administrator
  - Professional Administrator with an Employer Identification Number (EIN)
  - Administers MSA Funds and report to Medicare

Slide notes

Users will be required to first specify the type of account for which they are registering. There are four types of WCMSAP accounts:

- Corporate
- Representative
- Self
- Professional Administrator

A corporate account type indicates that the submitter is registering as a corporate entity with an Employer Identification Number (EIN). Those registering as a corporate account type will be regularly submitting WCMSAP requests.

A representative account type is for a non-corporate WCMSAP submitter. These submitters do not have an EIN but will be submitting multiple cases.

A self-submitter account type is for a Medicare beneficiary or a claimant who has a reasonable expectation of becoming a Medicare beneficiary within 30 months and is submitting a case on their own behalf.

The self-submitter can only submit cases for themselves.

A professional administrator account type indicates that the entity is registering with an Employer Identification Number (EIN) and will be the responsible party for administering MSA funds and reporting to Medicare.

The account type selected will determine both the basic information that is captured during the registration process and the level of vetting that is subsequently undertaken.

Slide 21 - of 41 - Select Account Type

Slide notes

To register as a Corporate user, select the Corporate button and then click Next.

Slide 22 - of 41 - Corporate Information Page

Slide notes

After the Corporate account type is selected, the Account Representative will be directed to the Corporate Information page.

Slide 23 - of 41 - Corporate Information Page

Slide notes

Enter the EIN associated with the corporation reflected under this WCMSAP registration. If you have more than one EIN, you may submit this registration with any one of those EINs. Next, enter the corporation's mailing address.

The business address will be used by the BCRC to send the Profile Report and any correspondence regarding this Account ID to the corporation. Fields marked with an asterisk (*) are required.

*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 24 - of 41 - Corporate Information Page

Slide notes

If you need to cancel the registration process, click cancel. Once clicked, information entered on the current page and any previous pages will NOT be saved. To continue with the registration process, click Next.

Slide 25 - of 41 - Corporate Information Validation

Corporate Information Validation

- System validates each field on each registration page
- If errors are found
  - System displays message indicating what errors were found
  - Cursor is placed on the first field that generates an error
  - User must correct the error before being allowed to proceed
- The system will revalidate the data once it has been entered

Slide notes

The system will validate each field on each registration page for accuracy and completeness.

If errors are found, the system will display applicable error messages on the screen indicating what error condition(s) were found.

When errors are discovered, the cursor will be placed on the first field that generates an error condition. This will either be a required field that is missing data or a field that contains a data error.

The user must correct the error before the system will allow the user to proceed to the next page. Once the data has been corrected, the system will revalidate all data that has been entered.

Slide 26 - of 41 - Account Representative Information

Slide notes

As long as all information was entered correctly on the Corporate Information page, the Account Representative (AR) Information page will display next. This page captures information related to the Account Representative.

As the Account Representative, you must enter your personal information here.

Note: An Account Representative can only have that one role; the Account Representative cannot function as an Account Manager or an Account Designee.

Email addresses for each user role will be verified upon entry, and any address matches between the Account Manager, Account Designee, or Account Representative roles will be denied. Fields marked with an asterisk (*) are required.

Slide 27 - of 41 - Registration Process

Slide notes

Once the Account Representative Information page is complete, click the Next button to continue the registration process.

Slide 28 - of 41 - Registration Summary Page

Slide notes

The Registration Summary page will then display. This page lists all the information that was previously entered. All information should be reviewed and verified before continuing.

Slide 29 - of 41 - Print this Page Link

Slide notes

This page may be printed for your records using the "Print this page" link in the upper right-hand corner.

Slide 30 - of 41 - Editing Your Information

Slide notes

To make any corrections, click the Edit button next to the applicable section. Once clicked, the system will display that information entry page.

Slide 31 - of 41 - Add, Change, or Delete Information

Slide notes

Add, change, or delete any of the information as needed.

Slide 32 - of 41 - Representative Information

Slide notes

Once all corrections have been made, click Next to navigate back to the Registration Summary page.

Slide 33 - of 41 - Registration Summary

Slide notes

To complete the registration process, click the Submit Registration button.

Slide 34 - of 41 - WCMSA Registration Completed Successfully. Thank You Page

Slide notes

Once the registration has been submitted, the WCMSA Registration Completed Successfully. Thank You page will appear, outlining the next steps in the registration process.

Note: To register as a Professional Administrator, you would follow the same steps as registering for a corporate account.

Slide 35 - of 41 - Next Steps
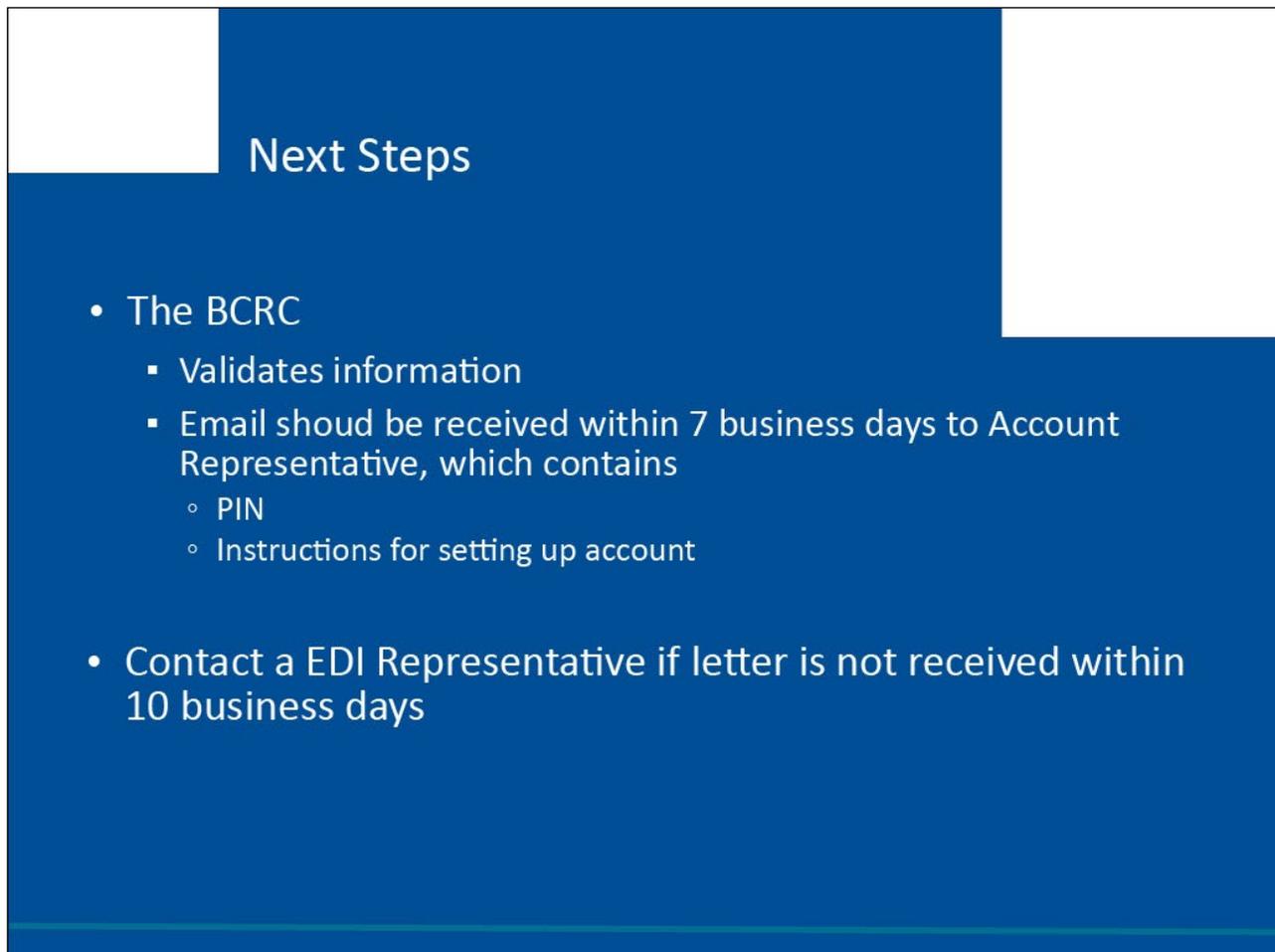
Slide notes

Once your registration application has been submitted, the information provided will be validated by the BCRC. Your submitter ID will display and need to be recorded for the Account Manager to complete setup.

Within 7 business days, the Account Representative will receive an email that contains the PIN along with instructions for setting up the account (which will be completed by the Account Manager).

If an email is not received within 7 business days, contact an EDI Representative.

Slide 36 - of 41 - Next Steps
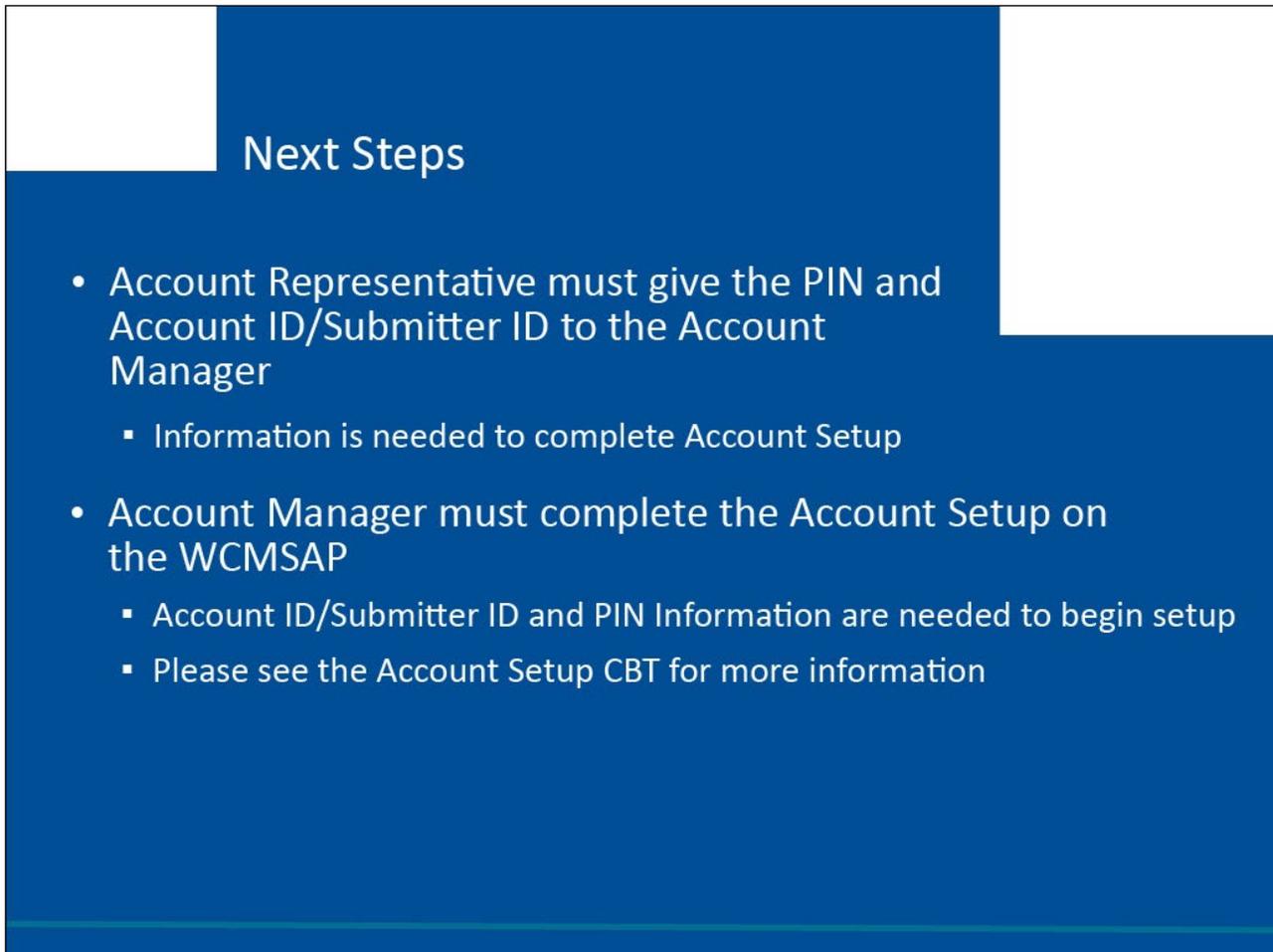
Next Steps

- Account Representative must give the PIN and Account ID/Submitter ID to the Account Manager
  - Information is needed to complete Account Setup
- Account Manager must complete the Account Setup on the WCMSAP
  - Account ID/Submitter ID and PIN Information are needed to begin setup
 - Please see the Account Setup CBT for more information

Slide notes

When the Account Representative has received the PIN, they must provide this information as well as the Account ID/Submitter ID to the Account Manager for the Corporate account.

The Account Manager (AM) needs this information in order to complete the next step in the registration process which is Account Setup. AM Account Setup must be completed on the WCMSAP website.

The Account Manager must return to the WCMSAP to complete the Account Setup. The Account Manager will need to enter the Account ID/Submitter ID and PIN on the main page to begin setup.

For more information on the Account Setup process, please see the [Account Setup CBT.](#)

Slide 37 - of 41 - Next Steps
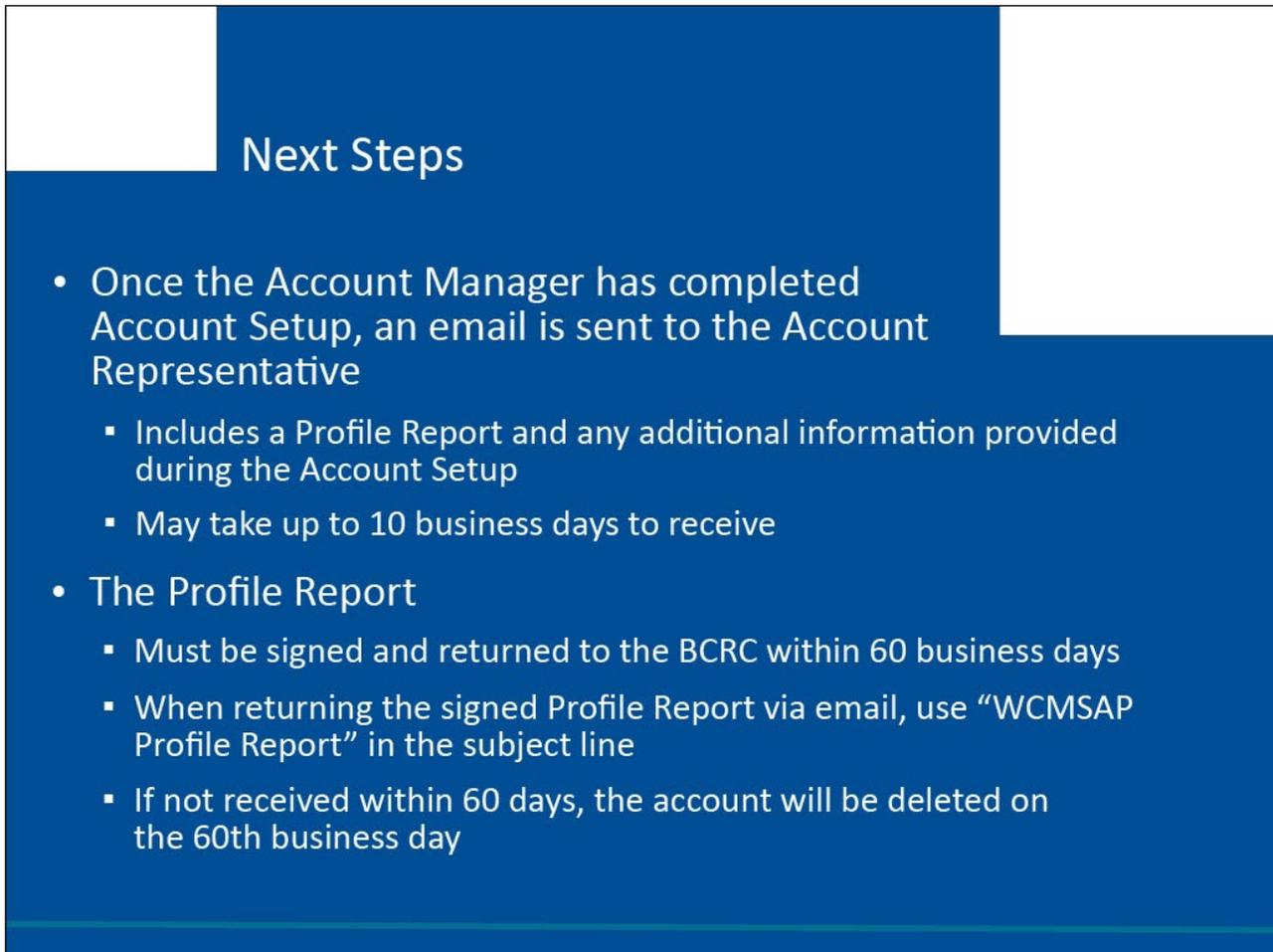
Next Steps

- Once the Account Manager has completed Account Setup, an email is sent to the Account Representative
  - Includes a Profile Report and any additional information provided during the Account Setup
  - May take up to 10 business days to receive
- The Profile Report
  - Must be signed and returned to the BCRC within 60 business days
  - When returning the signed Profile Report via email, use "WCMSAP Profile Report" in the subject line
  - If not received within 60 days, the account will be deleted on the 60th business day

Slide notes

Once the Account Manager has completed the Account Setup, an email notification will be sent to you, the Account Representative.

This notification will include a Profile Report denoting all information previously recorded during registration, and any additional information provided during the Account Setup.

It may take up to 10 business days to receive the Profile Report. 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.

Slide 38 - of 41 - Returning Back to the Welcome Page

Slide notes

To return to the WCMSAP Welcome page, click the Workers' Compensation Set-Aside Welcome Page link.

Slide 39 - of 41 - Course Summary

Course Summary

- Corporate Registration
- Professional Administrator Registration
- Next Steps

Slide notes

This course provided instruction on how to complete a Corporate and Professional Administrator registration on the WCMSAP and the steps to follow once the registration has been submitted.

Slide 40 - of 41 - Conclusion

You have completed the WCMSAP Registration Process 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/user Manual/WCMSAUserManual.pdf

Slide notes

You have completed the WCMSAP Registration Process course for Corporate and Processional Administrator Accounts. The information in this course can be referenced by using the document at the link below. WCMSAP User Manual PDF.

Slide 41 - of 41 - Training Survey
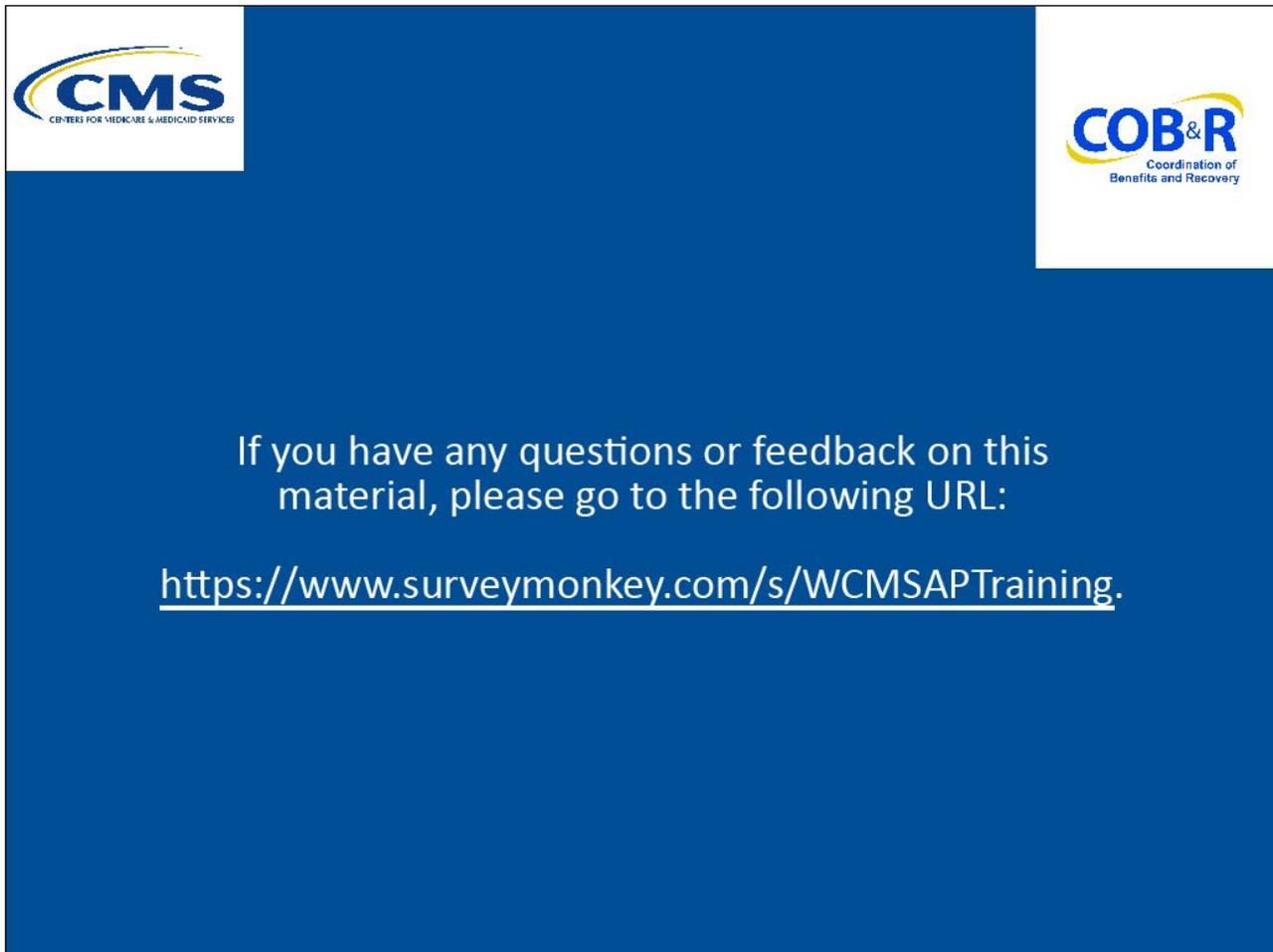
Slide notes

If you have any questions or feedback on this material, please go the following URL: WCMSAP Training Survey.