

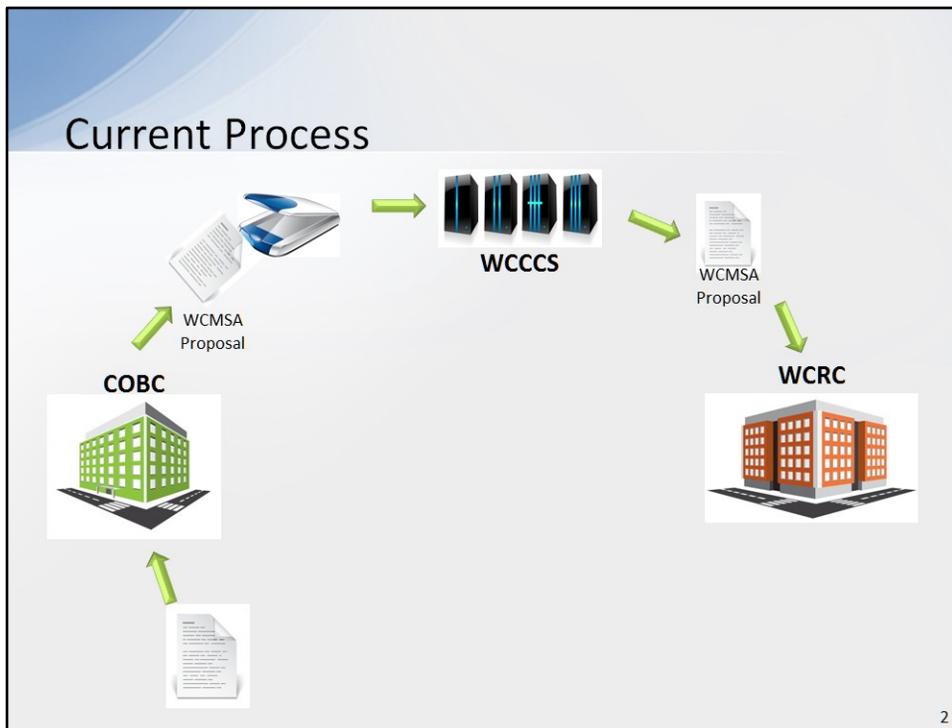


# Workers' Compensation Medicare Set-Aside Portal (WCMSAP)

## Webinar

**Note:** Coordination of Benefits (COB) activities for both Group Health Plans and Non-Group Health Plans (that is, liability insurance (including self-insurance), no-fault insurance, and workers' compensation laws or plans) and Recovery activities for Non-Group Health Plans will be transitioned from the COB contractor (COBC) and the Medicare Secondary Payer Recovery Contractor (MSPRC) effective February 1, 2014. The new Benefits Coordination & Recovery Center (BCRC) will assume these activities. Due to its historical content, this webinar presentation has not been updated with the new contractor name (BCRC).

Welcome to the Workers' Compensation Medicare Set-Aside Portal (WCMSAP) Webinar. The topics that will be discussed today include: the current WCMSA proposal submission process, the new submission process on the WCMSAP and an overview on the WCMSAP screens that will be used to enter and submit a Workers' Compensation Medicare Set-Aside Arrangement (WCMSA) proposal.



Currently, the initial processing of WCMsa proposals are handled manually by the Coordination of Benefits Contractor (COBC). A WCMsa proposal, including all paper documentation, is sent to the COBC. All eligible WCMsa proposals are then physically scanned into the Workers' Compensation Case Control System (WCCCS) in order to create a workers' compensation record on Medicare's System of records, i.e., the Common Working File (CWF). The WCCCS then electronically forwards these WCMsa proposals to the Workers' Compensation Review Contractor (WCRC) for independent review to assess both future medical and prescription drug costs.

## The WCMSAP

- The COBC along with the CMS have enhanced the current process by implementing the WCMSAP
  - A web-based application that allows for the electronic submission and tracking of WCMSA proposals submitted to CMS for review
    - Internet access is required



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The Coordination of Benefits Contractor (COBC) along with the Centers for Medicare & Medicaid Services (CMS) have enhanced the current process by implementing the WCMSAP. The WCMSAP is a web-based application that allows for the electronic submission and tracking of WCMSA proposals submitted to CMS for review. As a web-based application, users will need Internet access to be able to get into the system.

## The WCMSAP

**WCMSAP users will be able to submit and track WCMSA proposals independently**

- Submitters will be notified electronically of any missing documentation or incorrect data

**Appending new documents and/or replacing documentation is handled by the submitter through the WCMSAP**

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WCMSAP users will be able to submit and track WCMSA proposals independently without the need to make an inquiry to the COBC or CMS. Submitters will be notified electronically if any case documentation is missing or if any data was entered incorrectly. Appending new documents and/or replacing documentation to the WCMSA proposal will be handled directly by the submitter through the WCMSAP.

## The WCMSAP

**Once a case has been entered, the submitter will be able to access the case on the WCMSAP**

**Phone calls to obtain case status will no longer be necessary**

- Status on a given case can be viewed, on a real-time basis, via the web portal

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Once a case has been entered on the WCMSAP, the submitter will be able to access the case on the WCMSAP. Phone calls to obtain case status information will no longer be necessary; status on a given case can be viewed, on a real-time basis, via the web portal.

## The WCMSAP

- Authorized submitters (i.e., attorneys, beneficiaries, claimants, insurance carriers, representative payees, and WCMSA vendors) can
  - Create a work-in-progress case
  - Submit a case
  - Perform a case lookup
  - Append (or replace) documentation to a case
  - Receive alerts relating to case activity

Note: a work-in-progress case is a WCMSA proposal that was partially entered and saved, but not yet completed

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The WCMSAP allows authorized submitters (i.e., attorneys, beneficiaries, claimants, insurance carriers, representative payees, and WCMSA vendors) to: create a work-in-progress case, submit a case, perform a case lookup, append (or replace) documentation to a case, and receive alerts relating to case activity.

Note: a work-in-progress case is a WCMSA proposal that was partially entered and saved on the WCMSAP, to be completed and submitted at a later date. This option gives the user the opportunity to gather necessary case information prior to submitting a case to CMS for review.

## The WCMSAP and WCCCS Interface

- COBC will continue to support the manual submission of WCMSA proposals
- WCMSA proposals submitted by mail or CD-ROM
  - Not accessible on the WCMSAP
  - Only accessible on the WCCCS
- WCMSAP users cannot view/access any case that was manually processed by the COBC



The COBC will continue to support the manual submission of WCMSA proposals. However, any case that is submitted by mail or by CD-ROM will not be accessible on the WCMSAP. It will only be accessible on the WCCCS. This means WCMSAP users will not be able to view or access any case that was manually processed by the COBC.

## WCMSAP Users

Must register, be vetted and complete account setup before access will be granted

Once authorized, users can enter and submit WCMSA proposals and corresponding documentation directly

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In order to gain access to the WCMSAP, potential users must register, be vetted and complete account setup. Once users are authorized, they will be able to enter and submit WCMSA proposals and any corresponding documentation directly into the WCMSAP.

## Registration Process

**Submitters must determine their account type**

- Corporate
- Representative
- Self

**Submitters can only select one account type**

**Account type determines the information captured during registration and the level of vetting**

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Before beginning the registration process, submitters must determine their account type. There are three types of WCMSAP accounts: Corporate, Representative, and Self. Submitters can only select one account type. The account type selected determines both the basic information that is captured during the registration process and the level of vetting that is subsequently undertaken.

## Account Types

- Corporate account
  - Submitter is registering as a corporate entity with an EIN
  - Will regularly submit WCMSAP cases
- Representative account
  - Submitter is a non-corporate WCMSAP user
  - Does not have an EIN, but will submit multiple cases
- Self submitter account
  - Submitter is a Medicare beneficiary, or an individual with a reasonable expectation of becoming a Medicare beneficiary
  - Will submit the case for themselves

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A corporate account indicates that the submitter is registering as a corporate entity with an Employer Identification Number (EIN). Those registering as a Corporate account will regularly submit WCMSAP cases.

A representative account indicates that the submitter is a non-corporate WCMSAP user. These submitters do not have an EIN but will submit multiple cases.

A self submitter account indicates that the submitter is a Medicare beneficiary, or an individual with a reasonable expectation of becoming a Medicare beneficiary within 30 months, who wishes to submit a case for themselves.

## User Roles



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The WCMSAP permits multiple users per account type to assist in the account registration and case submission processes. Each user is defined by one of three possible roles, and each user can only have one role within the WCMSAP: Account Representative, Account Manager, or Account Designee.

## User Roles

- Account Representative
  - Corporate account only
  - Has the legal authority to bind the company to the contract and terms of WCMSAP requirements
- Account Manager
  - Controls the administration of an organization's account and manages cases, and case access
  - Each WCMSAP account is required to have only one Account Manager
- Account Designee
  - Invited by the Account Manager to have access to the WCMSAP for the Account Manager's account
  - Assist the Account Manager in the WCMSA submission process

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The Account Representative is for Corporate account types only. This is the individual who has the legal authority to bind the company to a contract and the terms of WCMSAP requirements and processing.

The Account Manager is the individual who controls the administration of an organization's account and manages cases, which includes managing case access. Each WCMSAP Account is required to have only one Account Manager.

At the organization's discretion, 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. These individuals will assist the Account Manager in the WCMSA submission process.

## Login ID and Password



During the registration process, new registrants will setup their WCMSAP Login ID and Password



The same Login ID and Password must be used to access the WCMSAP application

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During the registration process, new registrants will set up their WCMSAP Login ID and Password. WCMSAP users must use that same Login ID and Password to access the WCMSAP application.

## EDI Representative Support

- For assistance managing an account/personal information within the WCMSAP
  - Phone: 646-458-6740
  - E-mail: [COBVA@GHIMedicare.com](mailto:COBVA@GHIMedicare.com)
- EDI Representatives are available Monday-Friday, from 9:00 am to 5:00 pm, Eastern Standard Time



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If a user needs assistance managing an account or managing personal information within the WCMSAP, they may contact an Electronic Data Interchange (EDI) Representative for assistance by phone at 646-458-6740, or by e-mail at [COBVA@GHIMedicare.com](mailto:COBVA@GHIMedicare.com). EDI Representatives are available to assist users Monday through Friday, excluding Federal holidays, from 9:00 a.m. to 5:00 p.m., Eastern Standard Time.

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

## Logging into the WCMSAP

This web site is maintained by the U.S. Government and is protected by federal law. Use of this computer system without authority, ID and/or password, may be in violation of federal or relevant provisions of federal civil and criminal law.

Access the WCMSAP Web site at:  
<https://www.cob.cms.hhs.gov/WCMSA/>

Provides information about WCMSAP security measures including:

- Access
- Penalty
- Privacy laws

**Privacy Act Statement**  
 The collection of this information is authorized by 42 U.S.C. 1395y(b)(5). The information is used to 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 <http://www.cms.gov/WorkersCompAgencyServices/>

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

Click "I Accept" to access the WCMSAP Home Page

<sup>1</sup> A Privacy Act system of records is a group of any records about individuals and under the control of any Federal agency from which information is retrieved by the name or other personal identifier of the individual.

Privacy Policy | User Agreement

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Users will access the WCMSAP Web site at the following URL: <https://www.cob.cms.hhs.gov/WCMSA/>. Each time a user visits the WCMSAP Web site, the Login Warning page will display the Data Use Agreement (DUA). The DUA provides information about WCMSAP security measures including access, penalty and privacy laws. The Login Warning page can be printed by clicking the [Print this Page] link in the upper right corner of the page. 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.

**Welcome to the WCMSAP**

This site provides an interface for entry of Workers' Compensation Set-Aside Arrangements (WCMSA) proposals. Attorneys, insurance carriers, claimants, insurance carriers and WCMSA site to enter the case information directly. The site also provides Medicare beneficiaries, claimants, insurance carriers, and Medicaid Services (CMS).

**WCMSAP Message**  
The current message for the WCMSAP webpage is displayed. ENTER A TEXT MESSAGE AND CLICK CONTINUE.

**GETTING STARTED**  
For more information, refer to How To Get Started under the How To menu option.

**STEP 1**  
New Registration →

**STEP 2**  
Account Setup →  
(Account ID and PIN required)

**Sign into your account**

User Name:  
  
[Forgot ID](#)

Password:  
  
[Forgot Password](#)

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After the [I Accept] link is clicked, the WCMSAP Welcome page will display. Here, users must enter their "User Name" and "Password" to sign into their account and access the WCMSAP.

The screenshot shows the WCMASAP web portal interface. At the top left is the CMS logo (Centers for Medicare & Medicaid Services) and the title "Workers' Compensation Set-Aside Web Portal". To the right is the COB logo. 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 features a "WCMASAP" heading and introductory text. Below this, a blue callout box states: "From this page, the user can manage their account settings". To the right, a "QUICK HELP" box contains a link for "Help About This Page".

Below the introductory text, another blue callout box says: "Or, they can manage a case". Underneath, a section titled "I'd like to..." contains three links: "Create a New Case", "Case Lookup", and "View Alerts". Blue callout boxes explain each link:
 

- "Create a New Case": Used to input information and all relevant documentation for a WCMAS case.
- "Case Lookup": Used to search and/or access a previously submitted or saved case.
- "View Alerts": Used to examine any alerts that were sent for a case.

To the right of these links is an "Account Settings" box containing links for:
 

- Update Personal Information
- Update Account Information
- Designee Maintenance
- View Account Activity
- Change Password

At the bottom of the page, there are links for "Privacy Policy" and "User Agreement", and a page number "17".

When a user has successfully logged in, the WCMASAP Home Page will display. This page gives the user the ability to manage their account settings or manage a case. Users can access and make changes to cases under their assigned Account ID. Users will click the [Create a New Case] link to input information and all relevant documentation for a WCMAS case. [Case Lookup] will be used to search and/or access a previously submitted or saved case. [View Alerts] will be used to examine any alerts that were sent for a case.

# Entering a WCMSA Case

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

The information requested below will be systematically validated to ensure the Workers' Compensation Medicare Set-Aside Arrangements(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 total 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 Health Insurance Claim Number (HICN) must be provided. You may not provide both. The Initial Date of Injury CCYY may not be less than 1965.

HICN: \*  OR SSN: \*  -  -

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

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

Gender: \*

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

Proposed Settlement Amount: \* \$  -

Data is used to verify that a duplicate case does not already exist and that the proposed settlement amount is over the threshold amount for case submission and review

After the [Create a New Case] link is clicked, the New Case Creation page displays. Data entered on this screen will be used to verify that a duplicate case does not already exist and that the proposed settlement amount is over the threshold amount for case submission and review.

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

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

**Case Information**

Beneficiary/Claimant \* Diagnosis Codes \* WC Carrier \* Employer \* Attorney Notes Documents \* Summary

**Beneficiary/Claimant Information**

A superscript (¹) indicates a field is required for submission.

Quick Help  
[Help About This Page](#)

Last Name: Doe  
 First Name: John  
 MI: A  
 Beneficiary HICN:  
 Beneficiary/Claimant SSN: \*\*\*-\*\*-8521  
 Beneficiary/Claimant Date of Birth: 06/15/1966  
 Gender: Male

Address Line 1: ¹   
 Address Line 2:   
 City: ¹   
 State of Residence: ¹ -Select-  
 Zip Code: ¹  -   
 Phone:  -  -   
 State where injury occurred: ¹ -Select-  
 Submitter Type: ¹ -Select-

Next Save Work-In-Progress Case Summary Cancel Case Creation

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If the case creation criteria are met, the system will display the Case Information tabbed pages where the user will enter all information and relevant documentation for the WCMSA case. Tabs denoted with an asterisk indicate that data is required to be entered for that page. All required fields are denoted by a superscript (¹).

The first tabbed page that displays is the Beneficiary/Claimant Information page. When data-entry is completed on this page, the system will verify that the beneficiary is alive. If the beneficiary is deceased according to Medicare’s records, the user will be notified and asked if they wish to proceed with the entry. If the user proceeds and successfully submits the case, the case status will be set to DECD (Deceased), the case will be routed to the WCRC, and an alert will be sent to the submitter that states "Our records indicate the beneficiary is deceased. If there is evidence to the contrary, contact the WCRC. Within 10 business days, you must submit information that shows the beneficiary is not deceased."

The submitter must then provide supplemental information via the WCMSAP. If supplemental information is provided within 10 business days, the case status will change to DREC (Development Received). If supplemental information is not provided within 10 business days, the system will close the case and update the case status to CLOS (Manually Closed). After the 10th business day, if information is provided, the system will change the status to REOP (Case Reopened).

**Diagnosis Codes**

- A diagnosis lookup function will be available for the user to look up and select proper diagnosis codes
- Searches may be performed by specifying partial diagnosis codes or keywords
- Users are required to enter at least one Diagnosis Code, but may enter a maximum of 5
- Entered diagnosis codes are validated against the existing ICD-9 Diagnosis Code table

The next page in the WCMSAP case submission process is Diagnosis Codes. Users are required to enter at least one Diagnosis Code prior to the case submission, but may enter a maximum of 5 Diagnosis Codes for any given case.

A diagnosis lookup function will be available for the user to look up and select proper diagnosis codes. Searches may be performed by specifying partial diagnosis codes or keywords. If diagnosis codes are entered manually, they will be validated against the existing International Classification of Diseases, ninth revision (ICD-9) Diagnosis Code table. If the entered code is invalid, the user will be notified and will be required to correct it.

Prior to case submission, users will have the ability to delete any diagnosis code from the case.

Please note: WCMSA cases that have been submitted are reviewed in detail by the WCRC. If the WCRC identifies additional Diagnosis Codes, they will be included as a part of the WCRC's final recommendation.

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**Case Information**

Beneficiary/Claimant \* Diagnosis Codes \* **WC Carrier \*** Employer \* Attorney Notes Documents \* Summary

**Workers' Compensation (WC) Carrier**

An superscripted <sup>(1)</sup> indicates a field is required for submission.

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

Insurer Name: <sup>1</sup>   
 Address Line 1: <sup>1</sup>   
 Address Line 2:   
 City: <sup>1</sup>  State: <sup>1</sup>  Zip Code: <sup>1</sup>  -  -   
 Phone: <sup>1</sup>  -  -   
 Fax:  -  -   
 E-Mail:   
 Re-enter E-Mail:   
 Policy Number: <sup>1</sup>  OR Claim Number: <sup>1</sup>   
 Tax ID Number (TIN):   
 Rx PCN:  Rx BIN:

**Users are required to enter information for one Workers' Compensation Insurance Carrier upon case submission**

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Workers' Compensation (WC) Carrier is the next page in the WCMSAP case submission process. Users are required to enter information for one Workers' Compensation Insurance Carrier upon case submission.

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Case Information

Beneficiary/Claimant \* Diagnosis Codes \* WC Carrier \* **Employer \*** Attorney Notes Documents \* Summary

**Employer Information**

An superscripted (¹) indicates a field is required for submission.

Employer Name: ¹

Address Line 1: ¹

Address Line 2:

City: ¹  State: ¹ -Select- Zip Code: ¹  -

Phone: ¹  -  -

Employer Tax ID Number (TIN):

QUICK HELP  
[Help About This Page](#)

**Data entry is required on this page prior to case submission**

Previous Next Save Work-In-Progress Case Summary Cancel Case Creation

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The next page in the WCMSAP case submission process is Employer Information. Data entry is required on this page prior to case submission.

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 Workers' Compensation Set-Aside Web Portal  
 COB

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Skip Navigation

Case Information

Beneficiary/Claimant \* Diagnosis Codes \* WC Carrier \* Employer \* **Attorney** Notes Documents \* Summary

**Beneficiary/Claimant Attorney**

Please leave fields blank if not represented then Last Name, First Name, Address Line

If the beneficiary/claimant is represented by an attorney, the user is required to enter this data

If the beneficiary/claimant is not represented by an attorney, the user should leave these fields blank

Name:   
 Address Line 1:   
 Address Line 2:   
 City:  State:  Zip Code: -  
 Phone: --  
 Fax: --  
 Attorney E-mail Address:   
 Re-enter Attorney E-mail Address:   
 Address:

Previous Next Save Work-In-Progress Case Summary Cancel Case Creation

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The Beneficiary/Claimant Attorney page is next. If the beneficiary or claimant is represented by an attorney, the user is required to enter data on this page. However, if the beneficiary or claimant is not represented by an attorney, the user is instructed to leave these fields blank.

The screenshot shows the CMS Workers' Compensation Set-Aside Web Portal. The page title is "Case Information". Below the title are several tabs: "Beneficiary/Claimant \*", "Diagnosis Codes \*", "WC Carrier \*", "Employer \*", "Attorney \*", "Documents \*", and "Summary". The "Case Notes" tab is selected and highlighted with a red box. Below the tabs, there is a text box for adding a note and an "Add Note" button. A table below the text box shows the details of added notes, with columns for "Delete", "Date Added", "User", and "Notes".

**Users can add notes related to the WCMSA case to keep a listing of changes or other information**

**Notes may be deleted prior to submitting the case**

**Once a note is added, the system will immediately display the date the note was added, the user name, and the contents of the note**

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The Case Notes page provides the user with the ability to add notes related to the WCMSA case in order to keep a listing of changes or other miscellaneous information. Once a note is added, the system will immediately display the date the note was added, the name of the user that added the note, and the contents of the note on the Case Notes page. Notes may be deleted anytime prior to a case's submission. Data is not required on this page.

**Case Documents**

Used to

- Add documents to a case
- Delete documents prior to submitting a case
- Replace documents on submitted cases

Documents must be replaced when a case contains co-mingled documents

Only files flagged as replaceable can be replaced

Required for case submission

- Consent Form
- Rated Age Information or Life Expectancy
- Life Care Plan
- Proposed/Final Settlement Agreement or Court Order
- Medical Records
- Payment History
- Future Treatment Plans
- Supplement/Additional Information

The Case Documents page will be used to add documents to a case, delete documents prior to submitting a case, and/or replace documents on submitted cases. Typically, documents must be replaced when a case has been submitted and it contains co-mingled documents. Only files that have been flagged as replaceable by the WCRC can be replaced. A co-mingled alert will be listed on the Alert Lookup page in this instance.

Documents can be added to a case under the following document categories: Submitter Letter or Other Summary Documents, Consent Form, Rated Age Information or Life Expectancy, Life Care Plan, Proposed/Final Settlement Agreement or Court Order, Set-Aside Administrator or Copy of Agreement, Medical Records (1st Report of Injury through Recent Treatment). (Note: Medical records must be separated into files that contain less than 100 pages and these separate files must be created before attaching to a case); Payment History, Future Treatment Plans, and Supplement/Additional Information. The Consent Form is required for case submission.

• Provides a summary of all information that has been entered  
• Provides ability to verify/modify data pages before saving/submitting the case

Home Skip Navigation

Case Information

Beneficiary/Claimant \* Diagnosis Codes \* WC Carrier \* Employer \* Attorney Notes Documents \* **Summary**

**Summary Information**

Please review your case. If you are satisfied with the information entered, click the 'Submit Case' button to create the case. If you are not satisfied, click the 'Cancel' button to cancel the case. Print this page.

View Alerts

Case Number: WC1117400011021

**Claimant Information**

Last Name: Doe MI: A First Name: John  
Date of Birth: June 15, 1966  
Date of Injury: June 13, 2011  
HICN:  
SSN: 789-45-8521  
Address Line 1: 8 Test Ave  
Address Line 2:  
City: Towson  
State: Maryland  
Zip: 21204  
Phone: (111) 111-1111

**WC Carrier**

Insurer Name: AI  
Policy Number: .  
Claim Number: 7  
Rx PCN:  
Rx BIN:  
Tax ID Number (TIN):  
Address Line 1: 97 . Street  
**Address Line 2:**  
City: Towson  
State: Maryland  
Zip: 21204

Print this page

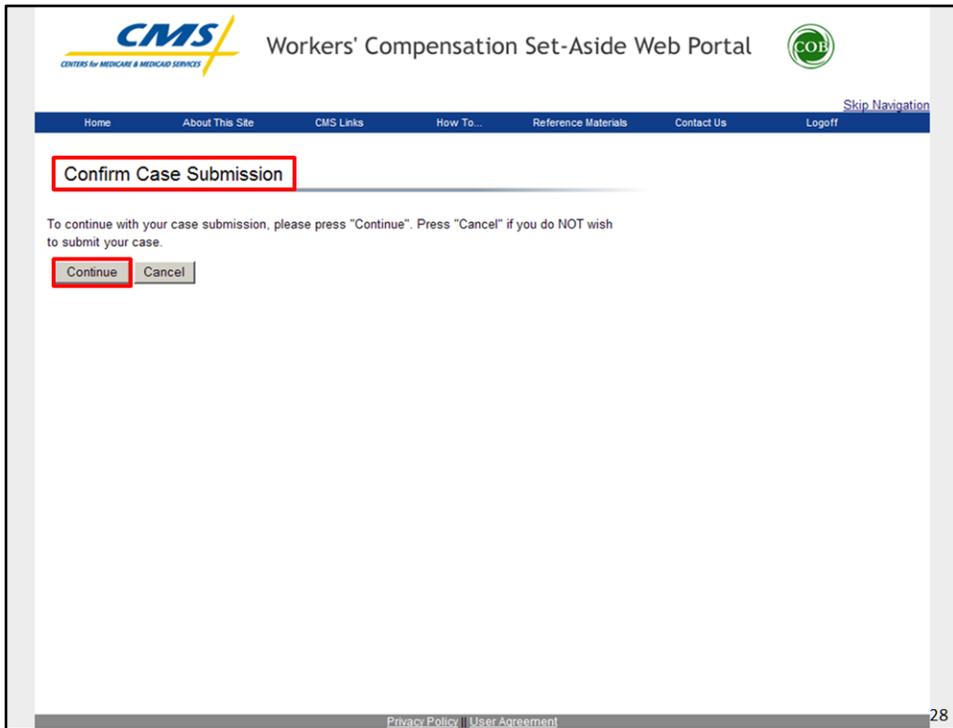
QUICK HELP  
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The Case Summary page provides a summary of all the information that has been entered for the WCMSA case and gives users the chance to verify and make any changes or additions to the data pages prior to saving or submitting the case.

With the exception of the Health Insurance Claim Number (HICN), Social Security Number (SSN), Initial Date of Injury, Proposed Settlement Amount, Last Name, First Name, Date of Birth and Gender, a user may modify data on all screens at any time prior to a case's submission. They may also add new files and/or delete previously added files. To make any required changes or additions the user will click the [Edit] button for the data page that needs modifications. This action will re-direct the user to the corresponding data page where changes can be made.

Once users have verified that all case information is complete and accurate and they are ready to submit the case, they will click the [Submit Case] button. The [Submit Case] button is active only after all required case information has been entered and a Consent Form has been uploaded. Once a case is submitted, it will be electronically sent to the WCRC for processing.



When a user has clicked on the [Submit Case] button, the Confirm Case Submission page displays. To continue with the case submission select the [Continue] button. The Successful Case submission page then displays.

## Work-In-Progress (WIP)

- May be used at any point during case creation
- Allows a user to input partial information if they do not have all of the information readily available
- User will receive a Case Control Number which will enable them to access the case at a later time
- Must be submitted within 60 business days from the initial WIP creation date, otherwise it will be deleted

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The WCMSAP provides a function that allows the user to save the case as a Work-In-Progress (WIP) at any point during the case creation. This option allows a user to input partial information for a case if they do not have all of the information readily available to submit the case. When a case is saved as a WIP, the user will receive a Case Control Number which will enable them to return to the case at a future point(s) in time in order to complete the case creation. Users must submit WIP cases within 60 business days from the initial WIP creation date, otherwise, the WIP case will be automatically marked as deleted.

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Workers' Compensation Set-Aside Web Portal

**Case Lookup**

**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 COBC 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](#)

**Used to access a**

- Case saved as a work-in-progress
- Previously submitted WCMSA Case

**QUICK HELP**

- [Help About This Page](#)

**Account Settings**

- [Update Personal Information](#)
- [Update Account Information](#)
- [Designee Maintenance](#)
- [View Account Activity](#)
- [Change Password](#)

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Cases that are saved as work-in-progress can be accessed for editing using the [Case Lookup] link on the WCMSAP Home Page. The [Case Lookup] feature can also be used to view a previously submitted WCMSA case.

**Case Lookup**

**Users may access cases associated to their Login ID**

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.

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

Case listings may be requested for:

- All cases (Both submitted and work-in-progress cases)
- Submitted cases only
- Work-in-progress cases only

results using:

Enter one of the following:

Case Control Number:

Health Insurance Claim Number (HICN):  OR SSN:  -  -

Date Range:

Case Creation Date Range:  
From Date  /  /  To Date:  /  /

Case Submission Date Range:  
From Date  /  /  To Date:  /  /

When a user clicks on the [Case Lookup] link from the WCMSAP home page, the Case Lookup screen will display. WCMSAP users may access cases that are associated with their Login ID using various user-specified criteria. Case listings may be requested for all cases (both submitted and work in progress cases), submitted cases only, or work-in-progress cases only. Users may narrow down the search results using the remaining, optional search fields: Case Control Number, Health Insurance Claim Number (HICN), Social Security Number (SSN), Case Creation Date Range and/or Case Submission Date Range. To begin the search, users will click the [Search] button.

The screenshot shows the CMS Case Listing page. At the top, a blue box explains the search criteria: "Display cases that met the search criteria associated to the User ID (submitted)". Below this, a list of case statuses is provided: DREC (user has successfully submitted files to a previously submitted case), DECD (beneficiary has been flagged as deceased), and DEVP (co-mingled documentation was found in the file or the WCRC/Regional Office (RO) made a request to the submitter for more information). A blue box also notes: "Current location of case as made for Submitter".

Callouts point to specific table columns:
 

- Case Control Number assigned by the system** points to the Case Number column.
- Date of the work-related injury or disease** points to the Date of Injury column.
- Allows Account Managers to manage access to the case by granting/revoking access** points to the Case Access column.

The table below shows the data displayed on the page:

Delete	Case Number	Claimant Name	Date of Injury	Case Status	Case Location	Creation Date	Submission Date	Case Access
	WC [redacted]	Doe, John	2011-06-13	Received	WCRC	2011-06-23	2011-06-23	<a href="#">Manage Access</a>
	WC [redacted]	[redacted]	2008-08-04	Received	WCRC	2011-06-20	2011-06-20	<a href="#">Manage Access</a>
	WC [redacted]	[redacted]	2008-08-03	Received	WCRC	2011-06-20	2011-06-20	<a href="#">Manage Access</a>
	WC [redacted]	[redacted]	2000-05-02	Received	WCRC	2011-06-13	2011-06-13	<a href="#">Manage Access</a>
	WC [redacted]	[redacted]	2000-06-01	Deceased	WCRC	2011-06-13	2011-06-13	<a href="#">Manage Access</a>
	WC [redacted]	[redacted]	[redacted]	Received	WCRC	2011-06-13	2011-06-13	<a href="#">Manage Access</a>
	WC [redacted]	[redacted]	[redacted]	Received	WCRC	2011-06-13	2011-06-13	<a href="#">Manage Access</a>

A blue callout box at the bottom of the table states: "To access/view a case, click on desired Case Number".

When the [Search] button has been clicked, the Case Listing page will display the cases that met the search criteria entered which are associated to the User ID. This page provides a summarized view of the case details including: Case Number, Claimant Name, Date of Injury, Case Status, Case Location, Creation Date, Submission Date, and Case Access.

- Case Number is the Case Control Number which is assigned by the system.
- Claimant Name is the name of the individual for whom the WCMSA has been submitted.
- Date of Injury is the date of the work-related injury or disease.
- Case Status is the current status of the case. It may be any of the following:
  - WIP (Work-in-Progress, case has been saved, but not yet submitted);
  - RECD (case has been successfully submitted);
  - DREC (user has successfully submitted files to a previously submitted case);
  - DECD (beneficiary has been flagged as deceased);
  - DEVP (co-mingled documentation was found in the file or the WCRC/Regional Office (RO) made a request to the submitter for more information);
  - CLOS (case has been closed);
  - REOP (case has been re-opened);
- Case Location is the current location of the case. This may be Submitter, WCRC, or RO.
- Creation Date is the initial date the case was created.
- Submission Date is the date the WCMSA case was successfully submitted.
- Case Access allows Account Managers to manage access to the case by granting or revoking access for all active Account Designees under the given WCMSAP account.

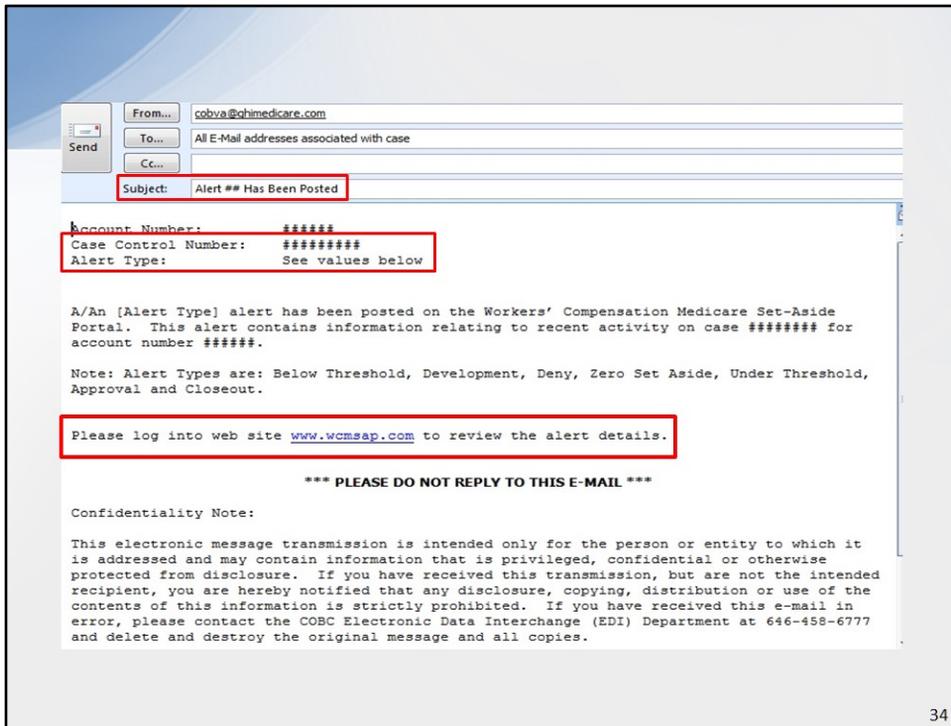
To access/view a case, the user will click on the desired Case Number. When the case is accessed, the Case Summary Page will be displayed where the user can view any section if the case has been submitted, or edit any section if the case is a WIP.

## Alerts

- WCRC reviews each submitted case for completeness and accuracy
- If errors are found or if additional information is needed, the WCRC will send an e-mail alert
  - For example, if any mandatory documents are missing, a Development Alert will be sent to the submitter requesting the missing information
- E-mail alert will be sent to the e-mail address provided during account setup

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WCMSA cases that have been submitted are reviewed in detail by the WCRC to ensure they are complete and accurate. During this review, if errors are found or if additional information is needed, the WCRC will send an e-mail alert to the submitter. For example, if any of the following mandatory documents are not included in the submission: Cover Letter, Consent Form, Medical Records, and Payment Information, a Development Alert will be sent via e-mail to the submitter requesting the missing information. The e-mail alert will be sent to the e-mail address provided during account setup. Please see the Alert Letter section of the WCMSAP User Guide for situations where the WCRC may send an Alert to the Submitter.



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A sample of an e-mail alert is shown here. The e-mail alert will contain the case control number and the type of error found and will invite the submitter to view the alert or letter on the WCMSAP. Most alerts are informational; however, some require action on the case.

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Workers' Compensation Set-Aside Web Portal

COB

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## 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 COBC 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](#)

**QUICK HELP**

[Help About This Page](#)

**Account Settings**

[Update Personal Information](#)

[Update Account Information](#)

[Designee Maintenance](#)

[View Account Activity](#)

[Change Password](#)

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To view Alerts, users will click on the [View Alerts] link from the WCMSAP Home Page.

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

**Alert Lookup**

Account Number: 30190

Fields can be used to search for a specific alert

**Type of Alert**

- Development – a need to gather additional information/documentation
- Below Threshold – case has a total settlement amount of \$250,000 or less for an individual who does not have a reasonable expectation of becoming a Medicare beneficiary within 30 months of settlement OR the case has a Total Settlement amount of \$25,000 or less for a Medicare beneficiary
- Approval
- Closeout
- Deceased
- Co-Mingling

**Entity that created the alert**

- Submitter
- WCRC
- RO

Click on Alert ID or Case Number to view the alert

Alert ID	Alert Creation Date	Alert Type	Case Number	Creator	Status	HICN/SSN	Bene Name
401	01/01/2014	Development	WC 123456789	WCSA	Read	****84713	
390	01/01/2014	Development	WC 987654321	WCSA	Not Read	****42204	

By default, the Alert Lookup page lists all alerts for the previous 60 days associated to the Users ID. Users can use the fields on the page to search for specific alerts. The Alert listing in the lower half of the Alerts page includes the following information related to the Alert:

**Alert ID** - identifier assigned to the alert by the system for tracking purposes. This is a unique number within the case.

**Alert Creation Date** - Date the alert was created.

**Alert Type** - Type of alert. Most alerts are a letter, and the Alert Detail page will contain the letter in PDF format.

Values for Alert Type include:

- *Below Threshold* – indicates that the case has a Total Settlement amount of \$250,000 or less for an individual who does not have a reasonable expectation of becoming a Medicare beneficiary within 30 months of the settlement date OR that the case has a Total Settlement amount of \$25,000 or less for a Medicare beneficiary;
- *Development* – indicates that there is a need to gather additional information or documentation;
- *Deny* – indicates that the proposed WCMSA amount has been denied;
- *Zero Set-Aside* – indicates that the settlement has been approved with a Medicare Set-Aside Amount of zero dollars;
- *Approval* – indicates the settlement has been approved. This alert includes recommendation attachments;
- *Closeout* – indicates the WCMSA case has been closed;
- *Deceased Beneficiary* – indicates the system found a date of death for the beneficiary. This alert does not produce a letter;
- *Co-Mingling* - indicates that documents must be replaced on the case. Only files that have been flagged as replaceable can be replaced. This alert does not produce a letter. (**Note:** When co-mingling has occurred the system must check to confirm that a replacement file was provided by the user. The case will be automatically closed out if the replacement documentation is not received within 10 business days).

**Case Number** - the Case Control Number associated with the alert.

**Creator** - entity that has entered the alert. Options are Submitter, WCRC and RO.

**Status** - status of the alert. Options are Read, Not Read and Archived.

**HICN/SSN** - the HICN or SSN of the beneficiary or claimant associated with the case. The first 5 digits of the HICN or SSN are masked by asterisks.

**Bene Name** - Name of the beneficiary or claimant associated with the case.

To view an alert, the user can click on the “Alert ID” or the “Case Number” for the specific alert.

Where possible, please submit any requested documents via the website instead of faxing or mailing.

Archive This Alert Close This Window

Account Number: 30190  
Case Control Number: WC  
Date of Alert: 06/17/2011  
Alert Type: Commingled Documentation  
Alert Number: 390  
HICN/SSN: \*\*\*\*\*42204  
Claimant:

- Displays the selected alert
- Most times, the contents of the letter will be displayed in PDF format
- Users must read the alert and make any necessary changes to the WCMSA proposal

A review of the WCMSA submission indicates that the file contains commingled documents.

Any file containing commingled documents must be replaced with a file without commingled documents, via the web portal within 10 business days from the date of this alert. Instructions relating to the replacement of a commingled document can be found in Online Help on the WCMSAP *Case Documents* screen. If files containing commingled documents are not replaced within 10 business days from the date of this alert, the case will be closed automatically. Commingled documents have been discovered in:

MILLIE IS TESTING THE COMMINGLED BUTTON

If you have any questions regarding this alert, please contact the WCRC at (301) for additional information.

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The Alert Detail page displays the selected alert. Most alerts are accompanied by letters. In most instances, the Alert Detail page will display the contents of the letter in PDF format. Users are instructed to read the alert and review for any required changes. If changes are required to the case, the user will utilize the [Case Lookup] function to access the case and make any necessary changes.

After viewing the alert, click [Archive This Alert] to change the alert status to Archived. Click [Close this Window] to close the alert and return to the previous page.

The screenshot shows the CMS Workers' Compensation Set-Aside Web Portal. At the top left is the CMS logo with the text "CENTERS for MEDICARE & MEDICAID SERVICES". To its right is the page title "Workers' Compensation Set-Aside Web Portal" and a COB logo. A blue navigation bar at the top contains the text "Customer Service". Below this bar, a blue callout box with a white arrow pointing to the navigation bar contains the text: "Users have access to information at any time through the use of the navigation menu options". The main content area includes a "Help About This Page" link, an "Account Settings" section with links for "Update Personal Information", "Update Account Information", "Designee Maintenance", "View Account Activity", and "Change Password", and a section titled "I'd like to..." with links for "Create a New Case", "Case Lookup", and "View Alerts". The footer contains "Privacy Policy", "User Agreement", and the page number "38".

In all data management programs there is the potential for an occasional need of assistance. Users of the WCMSAP have access to information at any time through the use of the navigation menu options at the top of each page.

**CMS**  
CENTERS for MEDICARE & MEDICAID SERVICES

Workers' Compensation Set-Aside Web Portal

COB

Skip Navigation

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

How To Use This Site

**WCMSAP**

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

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](#)

**QUICK HELP**

- [Help About This Page](#)

**Account Settings**

- [Update Personal Information](#)
- [Update Account Information](#)
- [Designee Maintenance](#)
- [View Account Activity](#)
- [Change Password](#)

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“About This Site” will navigate a user to the How to Use This Site link which offers general information on how to use the WCMSAP application.

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Skip Navigation

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

**WCMSAF**

Workers Compensation Agency Services  
General Medicare  
Coordination of Benefits

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

**Account Settings**  
[Update Personal Information](#)  
[Update Account Information](#)  
[Designee Maintenance](#)  
[View Account Activity](#)  
[Change Password](#)

The WCMSAP provides an i Medicare Set-Aside (WCMS case information directly. Th cases and the statuses with View Alert functions are also that function.

You may modify Account Se Account Settings list.

**I'd like to...**  
[Create a New Case](#)  
[Case Lookup](#)  
[View Alerts](#)

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“CMS Links” provides links to the Workers’ Compensation Agency Services page, General Medicare (the Medicare Web site), and the Coordination of Benefits information page on the CMS Web site.

The screenshot shows the WCMSAP interface. At the top left is the CMS logo (Centers for Medicare & Medicaid Services). To its right is the title "Workers' Compensation Set-Aside Web Portal" and the COB logo. A navigation bar contains links for "About This Site", "CMS Links", "How To...", "Reference Materials", "Contact Us", and "Logoff". A "Skip Navigator" link is in the top right.

The main content area is titled "WCMSAP". Below the title, there is introductory text: "The WCMSAP provides an interface for Medicare Set-Aside (WCMSA) practitioners to enter case information directly. The site also provides a means for entering cases and the statuses without inquiry to COBC or CMS. Certain View Alert functions are also available. Click the desired link to perform that function. You may modify Account Settings by clicking the appropriate Account Settings list."

Below the text is a section titled "I'd like to..." with three links: "Create a New Case", "Case Lookup", and "View Alerts".

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 Account Manager", and "How To Invite Account Designees".

A callout box points to this menu with the text: "The How To... section provides detailed information on performing the functions listed in the drop down menu."

On the right side of the page, there is a "QUICK HELP" section with a link "Help About This Page". Below that is an "Account Settings" section with links for "Designee Maintenance", "View Account Activity", and "Change Password".

At the bottom of the page, there are links for "Privacy Policy" and "User Agreement", and the page number "41" is in the bottom right corner.

“How To...” provides detailed information on performing the functions listed in the drop down menu.

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Workers' Compensation Set-Aside Web Portal

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Skip Navigation

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WCMSAP site User Manual

**WCMSAP**

The WCMSAP provides an interface for entry of Workers' Compensation Medicare Set-Aside (WCMSA) proposals. You may use this site to enter case information directly. The site also provides the ability to track submit cases and the statuses without inquiry to COBC 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](#)

**CLICK HELP**

[About This Page](#)

**Settings**

[Update Personal Information](#)

[Update Account Information](#)

[Designee Maintenance](#)

[View Account Activity](#)

[Change Password](#)

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“Reference Materials” provides access to a link where users can view and download the WCMSAP User Guide.

**CMS** CENTERS for MEDICARE & MEDICAID SERVICES  
Workers' Compensation Medicare Set-Aside Web Portal

COB

About This Site CMS Links How To... Reference Materials **Contact Us** Logoff Skip Navigator

## WCMSAP

The WCMSAP provides an interface for entry of Workers' Compensation

**CMS** CENTERS for MEDICARE & MEDICAID SERVICES  
Workers' Compensation Medicare Set-Aside Web Portal

COB

[Print this page](#) | [Close](#)

### Contact Us

If you have a program or technical problem involving your WCMSAP submission, contact the COBC EDI Department. EDI Representatives can help you find solutions for any questions, issues, or problems you have.

Call the COBC EDI Department at (646) 458-6740 for assistance.

[View Alerts](#)

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“Contact Us” displays the following message which includes information on how to contact the COBC. Users can contact the EDI Department by phone or e-mail.

The screenshot shows the WCMSAP web portal. At the top left is the CMS logo (Centers for Medicare & Medicaid Services). To its right is the title "Workers' Compensation Set-Aside Web Portal" and a COB logo. A navigation bar contains links: "About This Site", "CMS Links", "How To...", "Reference Materials", "Contact Us", and "Logoff". A "Skip Navigator" link is on the far right. The main content area is titled "WCMSAP" and contains text about the interface for entering Medicare Set-Aside (WCMSA) proposals. A blue callout box points to the "Logoff" link in the navigation bar, containing the following text:

- Ends the session
- Logs the user out of the WCMSAP
- Displays the Login Warning page

Below the callout, the "Logoff" link is visible in the navigation bar. To the right of the main content is a "QUICK HELP" section with a link "Help About This Page". Below that is an "Account Settings" section with links: "Update Personal Information", "Update Account Information", "Designee Maintenance", "View Account Activity", and "Change Password". Under the heading "I'd like to...", there are links for "Create a New Case", "Case Lookup", and "View Alerts". At the bottom of the page, there are links for "Privacy Policy" and "User Agreement", and the page number "44".

“Logoff” ends the session, logs the user out of the WCMSAP and displays the Login Warning page. Once the Login Warning page is displayed, the user should close their browser.

## Next Steps

- Curriculum of CBTs to assist you in
  - Using WCMSAP
- We strongly encourage you to complete all appropriate CBTs offered

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This concludes this presentation. CMS has provided a curriculum of computer based training modules (CBTs) to assist you in using the WCMSAP. We strongly encourage you to complete all appropriate CBTs offered.

## Next Steps

- To register for the curriculum, send an e-mail to [techi@nhassociates.net](mailto:techi@nhassociates.net)
  - Company name
  - Account type (Corporate, Representative or Self)
  - Name
  - Phone number (formatted ###-###-####)
  - E-mail address
- E-mail notification will be sent containing the URL for the curriculum

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If you have not yet registered for the curriculum, send an e-mail to [techi@nhassociates.net](mailto:techi@nhassociates.net). Specify that you are requesting the WCMSAP CBT curriculum, and include your company name, Account type (i.e., Corporate, Representative or Self) and the name, phone number (formatted: ###-###-####), and e-mail address for each individual you would like to register. Once your request has been processed, an e-mail notification containing the URL for the curriculum will be sent.



This concludes the WCMSAP Webinar.