Registration Process- Self Submitter

Slide 1 - of 31 - Registration Process - Self-Submitter

Workers' Compensation Medicare Set-Aside Portal (WCMSAP)

Registration Process - Self Submitter

Version 6.7, 01/09/2023
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) Registration Process course.

This module is intended for those individuals who will register for a self-submitter account.

A self-submitter account indicates that the submitter will be submitting a case for themselves.

A self-submitter must be a Medicare beneficiary or have a reasonable expectation of becoming a Medicare beneficiary within 30 months.

Slide 2 - of 31 - 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://go.cms.gov/wcmsa/.

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://go.cms.gov/wcmsa/.

Slide 3 - of 31 - Course Overview

Slide notes

This course will provide instruction on how to complete a self-submitter registration on the WCMSAP and the steps to follow once the registration has been submitted.

Slide 4 - of 31 - WCMSAP URL

Slide notes

All users must register for a Web portal account on the WCMSAP website.

To create your self-submitter account, you must go to the WCMSAP website at https://www.cob.cms.hhs.gov/WCMSA/ to begin the registration process.

Slide 5 - of 31 - Login Warning Page

Slide notes

Each time you visit the WCMSAP website, the Login Warning page will display.

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

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

Slide 6 - of 31 - 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 site and will be unable to register.

Slide 7 - of 31 - Welcome WCMSAP

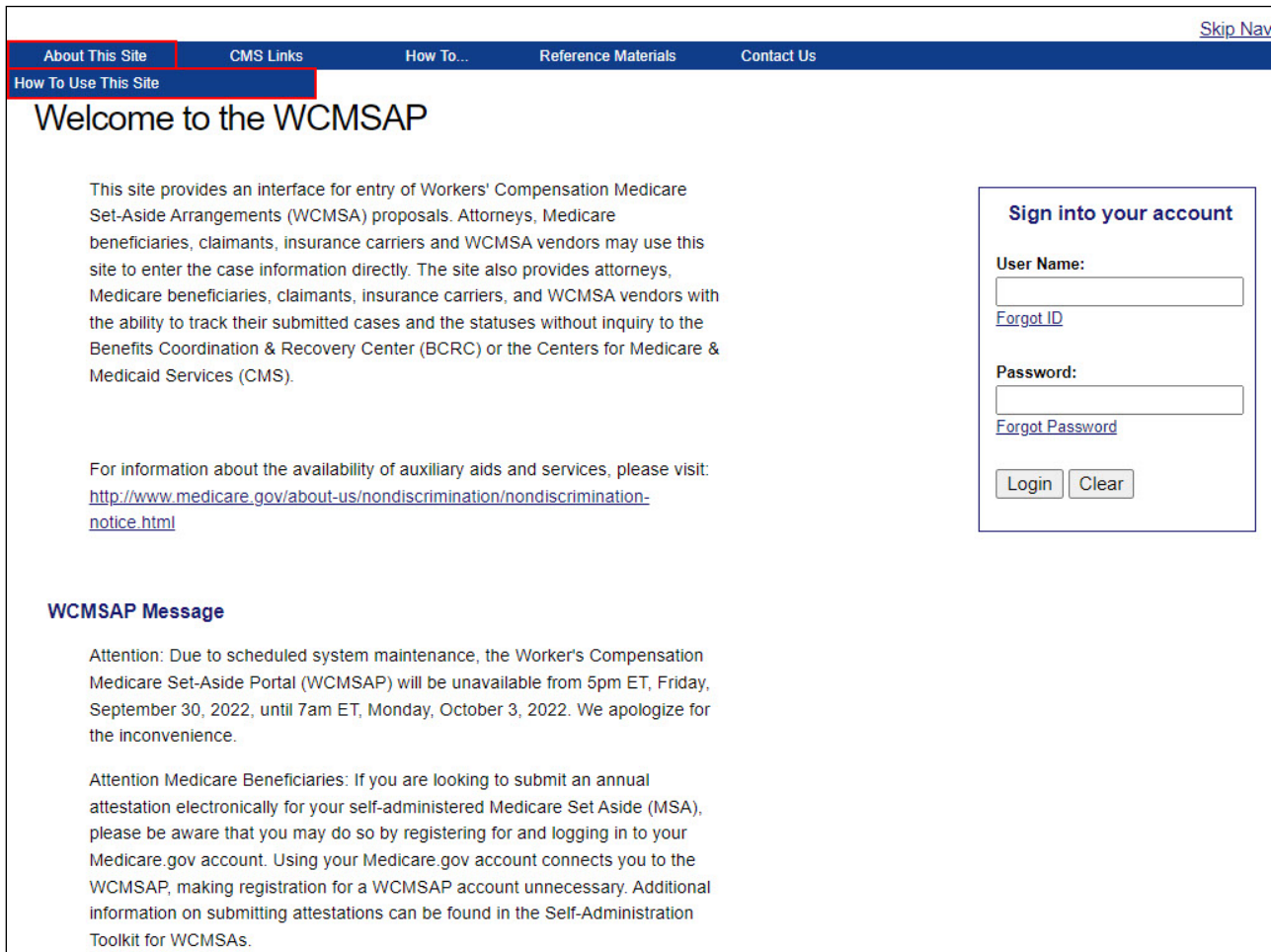**Slide notes**

Once you have clicked the [I Accept] link, the Login (Welcome to the WCMSAP) page will appear.

Here you will find various menu options.

Slide 8 - of 31 - 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 9 - of 31 - CMS Links

Slide notes

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

Slide 10 - of 31 - 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, and

Inviting Account Designees.

Slide 11 - of 31 - Reference Materials

Slide notes

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

Slide 12 - of 31 - Contact Us Link
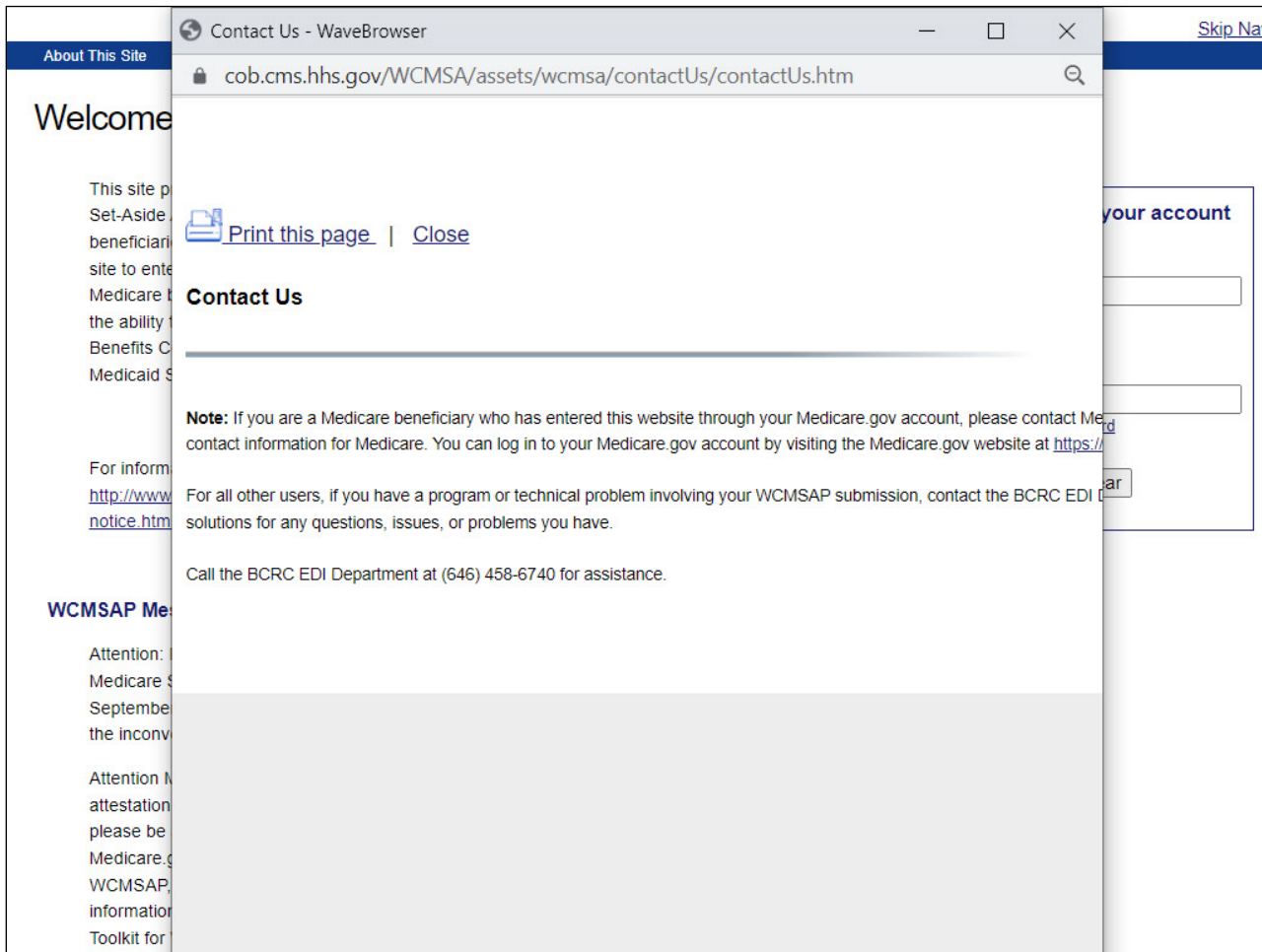
Slide notes

"Contact Us" shows the following message which provides information on how to contact the EDI Department.

Slide 13 - of 31 - New Registration Process

Slide notes

The first step in the WCMSAP registration process is Account Registration.

To begin this process, click New Registration.

Slide 14 - of 31 - Select Account Type

Slide notes

The Select Account Type page appears.

This page describes the differences between each account type.

Slide 15 - of 31 - Account Types

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, and
- 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.

Slide 16 - of 31 - Select Account Type - Self

Slide notes

To register as a self-submitter, select the Self button and then click Next.

Slide 17 - of 31 - Beneficiary/Claimant Information

Slide notes

After the Self account type is selected, you will be directed to the Beneficiary/Claimant Information page.

Slide 18 - of 31 - Beneficiary/Claimant Information

Slide notes

Complete this page for the beneficiary or claimant associated with the case that will be created using this Account ID.

The address entered will be used to send the Profile Report and any correspondence from the BCRC regarding this Account ID.

Fields marked with an asterisk (*) are required.

Once this page is complete, click Next.

Slide 19 - of 31 - Beneficiary Information Validation

Beneficiary Information Validation

- System validates each field on the registration page
- If errors are found
  - System displays message indicating errors found
  - Cursor is placed on the first field that generates an error
  - User must correct the error before being allowed to proceed
- Once the data is corrected, the system revalidates the data

Slide notes

The system will validate each field on the 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) was 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 20 - of 31 - Registration Summary Page

Slide notes

As long as all information was entered correctly on the Beneficiary/Claimant Information page, the Registration Summary page will display next.

This page lists all the information that was previously entered.

All information should be reviewed and verified before continuing.

Slide 21 - of 31 - Print this Page Link

Slide notes

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

Slide 22 - of 31 - 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 23 - of 31 - Editing Your Information

Slide notes

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

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

Slide 24 - of 31 - Submitting Your Registration

Slide notes

When all of the registration information has been verified, click Submit Registration.

Slide 25 - of 31 - WCMSA Registration Completed Successfully. Thank You Page

Slide notes

The WCMSA Registration Completed Successfully. Thank You page displays.

This page outlines the next steps in the registration process.

Slide 26 - of 31 - Next Steps

Slide notes

Once your registration application has been submitted, the information provided will be validated by the BCRC. You will need to record or print the submitter ID for use in later steps.

Within 7 business days, the BCRC will send an email to you with a personal identification number (PIN).

If this is not received within 7 business days, contact a BCRC Electronic Data Interchange (EDI) Representative.

*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 27 - of 31 - Next Steps Continued

Next Steps

- Complete Account Setup on the WCMSAP Web site
  - Enter the Account ID/Submitter ID and PIN on the main page
- Profile Report
  - Will be emailed to you once the Account Setup is completed
  - Will include all information previously entered
  - May take up to 10 business days to receive
  - Must be reviewed, signed, and returned to the BCRC within 60 days
  - When returning the signed Profile Report via email, include '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

Account Setup must be completed on the WCMSAP website. You will need to enter the Account ID/Submitter ID and PIN on the main page to begin Account Setup.

Once the Account Setup is completed, the BCRC will send an email notification to you, including a Profile Report denoting all information previously recorded during registration and any additional information provided during the Account Setup.
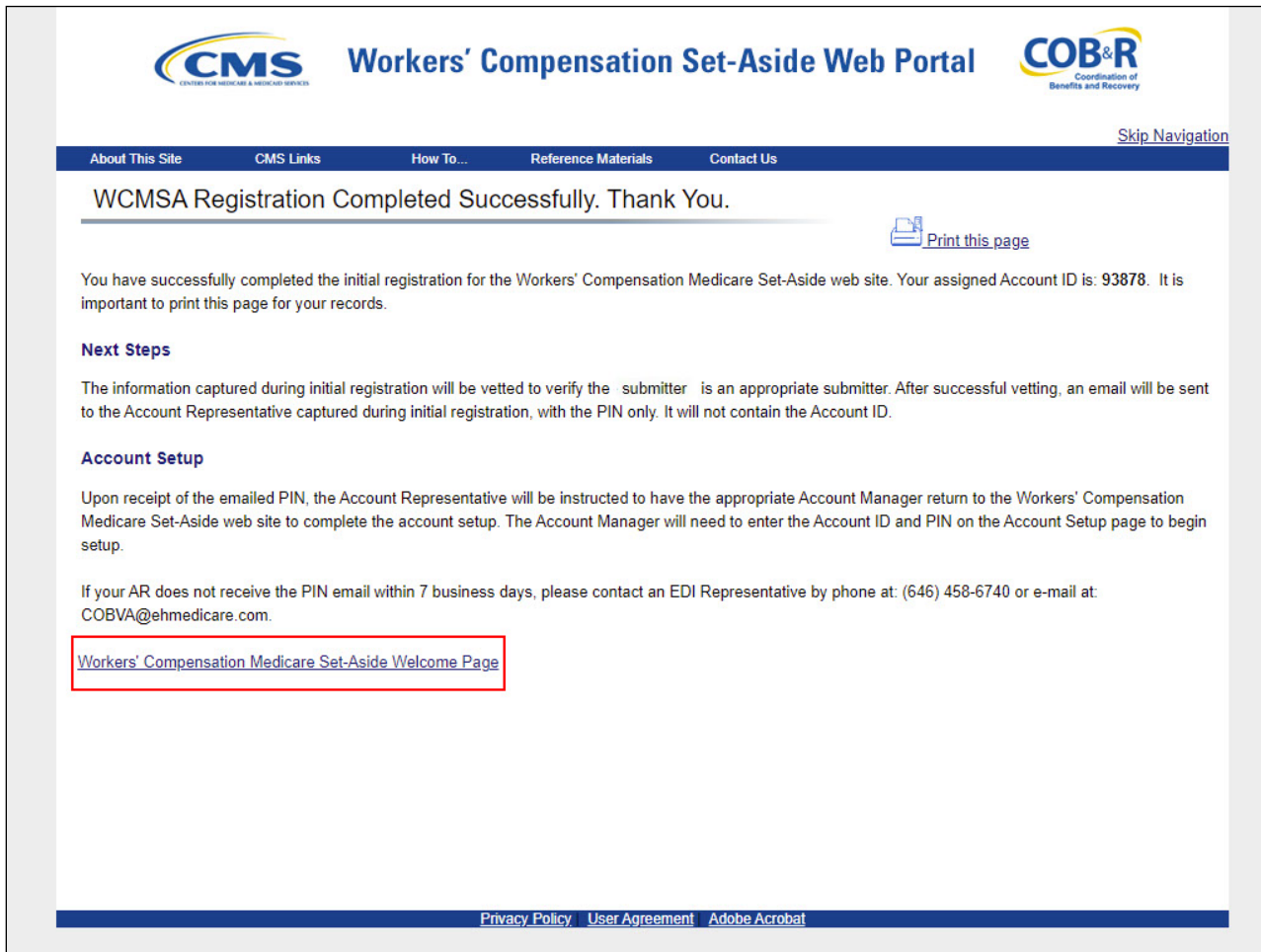
It may take up to 10 business days to receive the Profile Report.

The Profile Report must be reviewed, signed, and returned to the BCRC within 60 days.

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, the registration process must be restarted from the beginning.

Slide 28 - of 31 - Returning back to the Welcome/Login Page

Slide notes

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

Slide 29 - of 31 - Course Summary

Course Summary

- Self-Submitter Registration

- Next Steps

SUMMARY

Slide notes

This course provided instruction on how to complete a self-submitter registration on the WCMSAP and the steps to follow once the registration has been submitted.

Slide 30 - of 31 - Conclusion

Slide notes

You have completed the Registration Process for Self-Submitters 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 31 - of 31 - Training Survey

Slide notes

If you have any questions or feedback on this material, please go to the following URL:
https://www.surveymonkey.com/s/WCMSAPTraining.