

Alerts Introduction

Slide 1 of 16 - Alerts Introduction

CMS
CENTERS FOR MEDICARE & MEDICAID SERVICES

COB&R
Coordination of
Benefits and Recovery

Workers' Compensation Medicare Set-Aside Portal (WCMSAP)

Alerts

Version 7.2, 04/07/2025
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) Alerts course.

Slide 2 of 16 - Disclaimer

Disclaimer

While all information in this document is believed to be correct at the time of writing, this Computer Based Training (CBT) is for educational purposes only and does not constitute official Centers for Medicare & Medicaid Services (CMS) instructions for the WCMSAP. All affected entities are responsible for following the applicable CMS instructions found at the following link:

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

Slide notes

While all information in this document is believed to be correct at the time of writing, this Computer Based Training (CBT) is for educational purposes only and does not constitute official Centers for Medicare & Medicaid Services (CMS) instructions for the WCMSAP.

All affected entities are responsible for following the applicable CMS instructions found at the following link: [WCMSAP Website](#).

Slide 3 of 16 - Course Overview

Course Overview

- Alerts Explained
- Accessing Alerts
- Responding to Alerts



Slide notes

This course will describe what an alert is, explains the different ways to access an alert, and clarifies what to do when an alert is received.

Slide 4 of 16 - Email Notifications

The slide features a white background with two dark blue rectangular accents in the top-left and top-right corners. The title "WCM SAP Email Notifications" is centered at the top in a dark blue font. Below the title, there are two light blue rectangular boxes with black text. The first box contains the text "WCRC reviews submitted case for completeness and accuracy". The second box contains the text "If errors are found WCRC sends email alert to email address provided during account setup". A thin teal horizontal line is positioned near the bottom of the slide area.

Slide notes

Workers' Compensation Medicare Set-Aside (WCMSA) cases that have been submitted are reviewed by the Workers' Compensation Recovery Center (WCRC) for completeness and accuracy.

If errors are found, the WCRC will send an alert email to the email address provided during account setup.

Slide 5 of 16 - Email Notification

CMS **Workers' Compensation Set-Aside Web Portal** **COB&R**
CENTERS FOR MEDICARE & MEDICAID SERVICES Coordination of Benefits and Recovery

From: cobva@ghimedicare.com
 Sent: October 01, 2010 2:42 PM
 To: All E-mail addresses associated with case
 Subject: Alert ## Has Been Posted

Account Number: #####
 Case Control Number: #####
 Alert Type: See values below

A/An [Alert Type] alert has been posted on the Workers' Compensation Medicare Set-Aside Portal. This alert contains information relating to recent activity on case ##### for account number #####.

Note: Alert Types are: Below Threshold, Development, Deny, Zero Set Aside, Under Threshold, Approval, Closeout, Commingled Documentation, and Deceased Beneficiary.

Please log into the website <https://www.cob.cms.hhs.gov/WCMMSA> to review the alert details.
*****PLEASE DO NOT REPLY TO THIS EMAIL*****

Confidentiality Note:
 This electronic message transmission is intended only for the person or entity to which it is addressed and may contain information that is privileged, confidential, or otherwise protected from disclosure. If you have received this transmission but are not the intended recipient, you are hereby notified that any disclosure, copying, distribution, or use of the contents of this information is strictly prohibited. If you have received this e-mail in error, please contact the Electronic Data Interchange (EDI) Department at 646-458-6740 and delete and destroy the original message and all copies.

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

Slide notes

A sample of an email alert is shown here.

The email alert will contain the case 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.

You must read the alert and respond if necessary.

Slide 6 of 16 - WCMSAP View Alerts Link

Slide notes

Once logged into WCMSAP Portal the main page will appear. From the main menu select “View Alerts”.

The Alerts page will appear.

By default, this page lists all alerts for the previous 60 days associated with the Account ID you are registered under.

The data is sorted by Creation Date in descending order; however, you may sort the listing by case number and/or creation date.

Note: A new link, “Medicare.gov” has been added to the CMS Links dropdown menu and the “General Medicare” link has been renamed to “CMS.gov”.

Slide 7 of 16 - Alerts Page

The screenshot shows a web application interface for viewing alerts. At the top is a navigation bar with links: Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Logoff. The main heading is "Alerts". Below the heading, it states "7 items found, displaying all items." and provides instructions on how to filter alerts by Account ID, Alert ID, Alert Creation Date, and Case Number. There are search input fields for Case Control Number, Alert Status (set to "Not Archived"), Medicare ID, and SSN. A date range selector is also present. Below the search fields are radio buttons for sorting: "Order by Date, then Case Number" (selected) and "Order by Case Number, then Date". There are "Search" and "Clear" buttons. At the bottom, a table displays the search results.

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

Slide notes

If the specific Alert is not in the current display list, you have the ability to search for the alert using various search criteria.

You may search for alerts using any or all of the following fields to narrow down your search results:

- Case-Control Number - the number assigned to the WCMSAP case by the system
- Alert Status - the status associated to the alert. Options are Read, Not Read and, Archived
- Medicare ID - the Medicare ID Number of the Beneficiary/Claimant associated to the alert
- SSN - the Social Security Number of the Beneficiary/Claimant associated to the alert
- Creation From and To Date Range - the beginning and ending case creation dates

Please Note: Dates must be entered in a two-position month, two-position day, and four-position year format.

Once you have populated all relevant search criteria, click the Search button.

Note: A new WCMSAP Commingled Follow-up alert has been added to allow the WCRC to mark a case as comingled up to four times per review session. Also, a new letter/alert (using a separate template

with different verbiage than the existing commingled letter/alert) will be automatically sent to submitters (using the same CC rule as the existing commingled letter/alert) after the second instance of commingling within the same WCRC review session.

Slide 8 of 16 - Alerts Page

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

Alerts

7 items found, displaying all items.

QUICK HELP
[Help About This Page](#)

This page lists all alerts that correspond to the Account ID(s) you are registered under. You can select a notification to view by clicking on the Alert ID. The data is sorted by Alert Creation Date (descending) and Case Number (ascending).

Enter the search criteria in the provided fields and click 'Search.' Selecting 'Cancel' will return you to the Home page. If a date range is not provided, the application will present alerts for the most current 60 days.

Case Control Number:

Alert Status: **Not Archived** ▼

Medicare ID: OR SSN: - -

Date Range:

Alert Creation Date Range:
From Date / / To Date: / /

Order by Date, then Case Number
 Order by Case Number, then Date

Alert ID	Alert Creation Date	Alert Type	Case Number	Creator	Status	Medicare ID/SSN	Bene Name
364116	01/24/2024	Commingled Follow-up	WC1123400010186	WCSA	Not Read	*****9555A	HIEN VO
163	02/14/2011	Closeout	WC1103900010517	WCSA	Not Read	*****2013A	MARY JONES
161	02/14/2011	Commingled	WC1103900010518	WCSA	Read	*****-8155	JOHN SMITH
143	02/09/2011	Development	WC1103900010519	WCSA	Read	*****-9474	GLORIA MAINE
125	02/08/2011	Under Threshold	WC1103900010420	WCSA	Read	*****-3214	JAMES DOE
115	01/15/2011	Zero	WC1103900010148	WCSA	Read	*****-8450	KIM BAKER

Slide notes

The Alerts page will reappear. The only alerts listed will be those that matched the search criteria that were also associated to your Account ID.

The Alert listing in the lower half of the Alerts page includes the following information related to the Alert:

- Alert ID - the ID number associated to the alert
- Alert Date - the date the alert was created
- Alert Type - the 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 a case where the claimant is currently a Medicare beneficiary and the total settlement amount is \$25,000 or less; or the claimant does not have a reasonable expectation of Medicare enrollment within 30 months of the settlement date and the total settlement amount is \$250,000 or less.
 - 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 (MSA) Amount of zero dollars.
- Approval - indicates the settlement has been approved. This alert includes recommendation attachments.
- Closeout - indicates the WCMSA case has been closed.
 - Note: A case has expired if it has remained in Closeout status for more than 12 months since the date of the last Closeout Letter.
- Deceased Beneficiary - indicates that 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 if the replacement documentation is not received within 10 business days).
- Case Number - the Case Control Number associated with the alert;
- Creator - the entity that entered the alert. Options are WCRC and Regional Office (RO).
- Status - the status of the alert. Options are Open or Archived.
- Medicare ID/SSN - the Medicare ID or SSN of the beneficiary or claimant associated with the case. The first 5 digits of the Medicare ID or SSN are masked by asterisks.
- Bene Name - the name of the beneficiary or claimant associated with the case.

Slide 9 of 16 - Alert ID Link

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

Alerts

7 items found, displaying all items.

QUICK HELP
[Help About This Page](#)

This page lists all alerts that correspond to the Account ID(s) you are registered under. You can select a notification to view by clicking on the Alert ID. The data is sorted by Alert Creation Date (descending) and Case Number (ascending).

Enter the search criteria in the provided fields and click 'Search.' Selecting 'Cancel' will return you to the Home page. If a date range is not provided, the application will present alerts for the most current 60 days.

Case Control Number:

Alert Status: Not Archived ▼

Medicare ID: OR SSN: - -

Date Range:

Alert Creation Date Range:

From Date / / To Date: / /

Order by Date, then Case Number
 Order by Case Number, then Date

Alert ID	Alert Creation Date	Alert Type	Case Number	Creator	Status	Medicare ID/SSN	Bene Name
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143	02/09/2011	Development	WC1103900010519	WCSA	Read	*****-9474	GLORIA MAINE
125	02/08/2011	Under Threshold	WC1103900010420	WCSA	Read	*****-3214	JAMES DOE
115	01/15/2011	Zero	WC1103900010118	WCSA	Read	*****-8450	KIM BAKER

Slide notes

To view a specific alert, click on the Alert ID.

Slide 10 of 16 - Alert Detail Page

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

Archive this Alert Close This Window



MEDICARE - Combination of Benefits
1-800-999-1118 or (TTY/TDD): 1-800-318-8782

02/14/2011

Sue Smith
RE: Workers' Compensation Medicare Set-aside Arrangement for:
Claimant: M JONES
Medicare ID: *****2013A
SSN:
Date of Injury: 01/01/2009
CMS Case Control Number: WC1103900010517

Dear Sue Smith:

We recently requested additional information from your office to determine the appropriate Medicare set-aside for the claimant named above. Since that time, either ten business days have expired without our receiving a reply, or the reply we received did not include what we need.

We still need:

Freeform text would display here..

Therefore, we are closing this case and treating it as ineligible for review due to lack of sufficient information. This action may result in the non-payment of the Medicare beneficiary's claims that are related to the workers' compensation injury or illness. **Note: The case will automatically reopen when the requested information is appended/received.** If you have any questions regarding our request for additional information, please contact the WCRC toll free at 301-575-0160.

Sincerely,
Ann Young

Slide notes

When the Alert ID is clicked, the system will display the Alert Detail page for the selected alert.

The Alert Detail page will include all details for 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.

Slide 11 of 16 - Alert Case Number Link

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

Alerts

7 items found, displaying all items.

QUICK HELP
[Help About This Page](#)

This page lists all alerts that correspond to the Account ID(s) you are registered under. You can select a notification to view by clicking on the Alert ID. The data is sorted by Alert Creation Date (descending) and Case Number (ascending).

Enter the search criteria in the provided fields and click 'Search.' Selecting 'Cancel' will return you to the Home page. If a date range is not provided, the application will present alerts for the most current 60 days.

Case Control Number:

Alert Status: **Not Archived** ▼

Medicare ID: OR SSN: - -

Date Range:

Alert Creation Date Range:
 From Date / / To Date: / /

Order by Date, then Case Number
 Order by Case Number, then Date

Alert ID	Alert Creation Date	Alert Type	Case Number	Creator	Status	Medicare ID/SSN	Bene Name
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143	02/09/2011	Development	WC1103900010519	WCSA	Read	*****-9474	GLORIA MAINE
125	02/08/2011	Under Threshold	WC1103900010420	WCSA	Read	*****-3214	JAMES DOE
115	01/15/2011	Zero	WC1103900010416	WCSA	Read	*****-8450	KIM BAKER

Slide notes

You may also have the option to view all alerts associated to a specific case by clicking on a specific Case Number.

When the case number link is selected, the system will display the Alert Listing page where all alerts associated to the selected case will be displayed.

You can then click an Alert ID link to view a specific alert.

Slide 12 of 16 - Alert Listing Page

The screenshot shows the 'Alert Listing' page for case number WC1103900010518. The page features a navigation bar with links for Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Logoff. The main content area includes a 'QUICK HELP' button and a table of alerts. The table has columns for Alert ID, Alert Creation Date, Alert Type, Creator, Status, Medicare ID/SSN, and Bene Name. A single alert is listed with ID 161, creation date 02/14/2011, type 'Commingled', creator 'WCSA', status 'Read', Medicare ID '*****-8155', and bene name 'JOHN SMITH'. A 'Previous' button is located below the table. The footer contains links for CMS/HHS Vulnerability Disclosure Policy, Privacy Policy, User Agreement, and Adobe Acrobat.

Alert ID	Alert Creation Date	Alert Type	Creator	Status	Medicare ID/SSN	Bene Name
161	02/14/2011	Commingled	WCSA	Read	*****-8155	JOHN SMITH

Slide notes

When the case number link is selected, the system will display the Alert Listing page where all alerts associated to the selected case will be displayed.

You can then click an Alert ID link to view a specific alert.

Slide 13 of 16 - Alert Detail Page

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

Archive this Alert Close This Window

 
CENTERS for MEDICARE & MEDICAID SERVICES MEDICARE - Combination of Benefits
1-800-999-1118 or (TTY/TDD): 1-800-318-8782

02/14/2011

Sue Smith
RE: Workers' Compensation Medicare Set-aside Arrangement for:
Claimant: M JONES
Medicare ID: *****2013A
SSN:
Date of Injury: 01/01/2009
CMS Case Control Number: WC1103900010517

Dear Sue Smith:

We recently requested additional information from your office to determine the appropriate Medicare set-aside for the claimant named above. Since that time, either ten business days have expired without our receiving a reply, or the reply we received did not include what we need.

We still need:

Freeform text would display here..

Therefore, we are closing this case and treating it as ineligible for review due to lack of sufficient information. This action may result in the non-payment of the Medicare beneficiary's claims that are related to the workers' compensation injury or illness. **Note: The case will automatically reopen when the requested information is appended/received.** If you have any questions regarding our request for additional information, please contact the WCRC toll free at 301-575-0160.

Sincerely,
Ann Young

Slide notes

Again, once an Alert ID is clicked, the system will display the Alert Detail page for the selected Alert.

Once a specific alert has been accessed, you should read the alert and determine what actions need to be taken. If the alert requires changes to the account, access the case using the Case Lookup link on the WCMSAP Home page.

Please see the [Case Lookup](#) CBT for more information on how to access a WCMSA case.

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

Slide 14 of 16 - Course Summary

Course Summary

- Alerts Explained
- Accessing Alerts
- Responding to Alerts



Slide notes

This course described what an alert is, explained the different ways to access an alert, and clarified what to do when an alert is received.

Slide 15 of 16 - Conclusion



You have completed the WCMSAP Alerts 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 Alerts course.

The information in this course can be referenced by using the document at the following link: [WCMSAP User Guide PDF](#).

Slide 16 of 16 - 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>.

Slide notes

If you have any questions or feedback on this material, please go to the following URL: [WCMSAP Training Survey](https://www.surveymonkey.com/s/WCMSAPTraining).