

## 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 7.0, 04/01/2024  
Note: CMS reserves the right to modify this presentation. To ensure you have the most current version, verify that the version and date on this page match the version and date on the corresponding page of the PDF currently available on:  
<https://go.cms.gov/wcmsa/>.

### Slide notes

Welcome to the Workers' Compensation Medicare Set-Aside Portal (WCMSAP) 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**

**WCM SAP Email Notifications**

WCRC reviews submitted case for completeness and accuracy

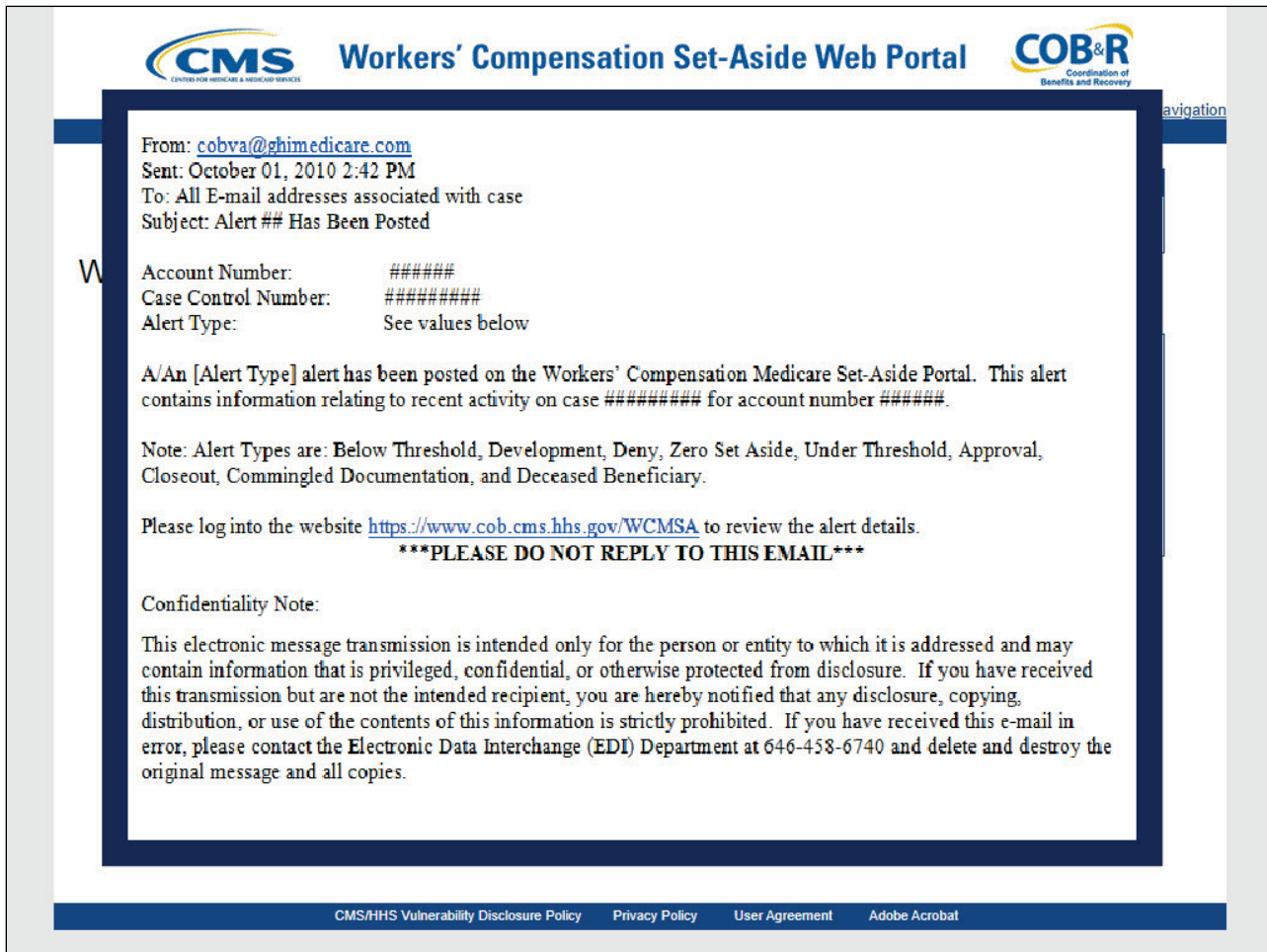
If errors are found WCRC sends email alert to email address provided during account setup

**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



Slide notes

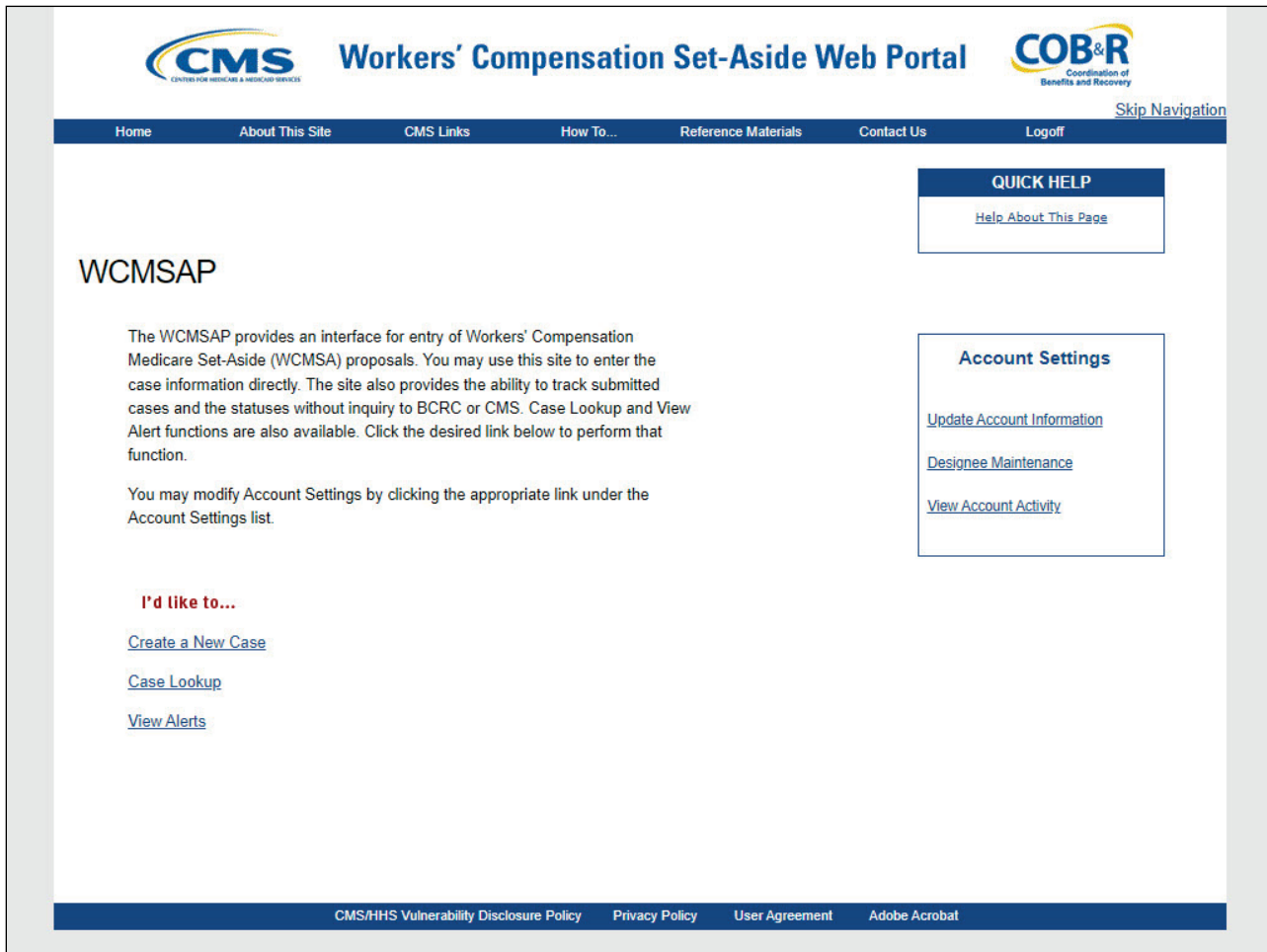
A sample of an email alert is shown here.

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. Below the navigation bar is the title 'Alerts' and a sub-header '7 items found, displaying all items.' To the right is a 'QUICK HELP' button with a link 'Help About This Page'.

The main content area contains instructions: '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.'

Search filters include:
 

- Case Control Number: [input field]
- Alert Status: [Not Archived] (dropdown menu)
- Medicare ID: [input field] OR SSN: [input field]-[input field]-[input field]
- Date Range: [input field]
  - Alert Creation Date Range: From Date [input field]/[input field]/[input field] To Date: [input field]/[input field]/[input field]
- Order by:
  - Order by Date, then Case Number
  - Order by Case Number, then Date

Buttons for 'Search' and 'Clear' are located below the filters.

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

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; and
- 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
<a href="#">364116</a>	01/24/2024	Commingled Follow-up	<a href="#">WC1123400010186</a>	WCSA	Not Read	*****9555A	HIEN VO
<a href="#">163</a>	02/14/2011	Closeout	<a href="#">WC1103900010517</a>	WCSA	Not Read	*****2013A	MARY JONES
<a href="#">161</a>	02/14/2011	Commingled	<a href="#">WC1103900010518</a>	WCSA	Read	*****-8155	JOHN SMITH
<a href="#">143</a>	02/09/2011	Development	<a href="#">WC1103900010519</a>	WCSA	Read	*****-9474	GLORIA MAINE
<a href="#">125</a>	02/08/2011	Under Threshold	<a href="#">WC1103900010420</a>	WCSA	Read	*****-3214	JAMES DOE
<a href="#">115</a>	01/15/2011	Zero	<a href="#">WC1103900010418</a>	WCSA	Read	*****-8450	KIM DAVEN

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
<a href="#">364116</a>	01/24/2024	Commingled Follow-up	<a href="#">WC1123400010186</a>	WCSA	Not Read	*****9555A	HIEN VO
<a href="#">163</a>	02/14/2011	Closeout	<a href="#">WC1103900010517</a>	WCSA	Not Read	*****2013A	MARY JONES
<a href="#">161</a>	02/14/2011	Commingled	<a href="#">WC1103900010518</a>	WCSA	Read	*****-8155	JOHN SMITH
<a href="#">143</a>	02/09/2011	Development	<a href="#">WC1103900010519</a>	WCSA	Read	*****-9474	GLORIA MAINE
<a href="#">125</a>	02/08/2011	Under Threshold	<a href="#">WC1103900010420</a>	WCSA	Read	*****-3214	JAMES DOE
<a href="#">115</a>	01/15/2011	Zero	<a href="#">WC1103900010418</a>	WCSA	Read	*****-8458	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 - Coordination 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
<a href="#">364116</a>	01/24/2024	Commingled Follow-up	<a href="#">WC1123400010186</a>	WCSA	Not Read	*****9555A	HIEN VO
<a href="#">163</a>	02/14/2011	Closeout	<a href="#">WC1103900010517</a>	WCSA	Not Read	*****2013A	MARY JONES
<a href="#">161</a>	02/14/2011	Commingled	<a href="#">WC1103900010518</a>	WCSA	Read	*****-8155	JOHN SMITH
<a href="#">143</a>	02/09/2011	Development	<a href="#">WC1103900010519</a>	WCSA	Read	*****-9474	GLORIA MAINE
<a href="#">125</a>	02/08/2011	Under Threshold	<a href="#">WC1103900010420</a>	WCSA	Read	*****-3214	JAMES DOE
<a href="#">115</a>	01/15/2011	Zero	<a href="#">WC1103900010416</a>	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. A 'Skip Navigation' link is also present. The main content area includes a 'Case Number: WC1103900010518' and a 'QUICK HELP' button with a 'Help About This Page' link. A descriptive text states: 'This page lists all the alerts for the selected case. The data is sorted by Alert Creation Date (descending)'. Below this is a table with the following data:

Alert ID	Alert Creation Date	Alert Type	Creator	Status	Medicare ID/SSN	Bene Name
<a href="#">161</a>	02/14/2011	Commingled	WCSA	Read	*****-8155	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.

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



MEDICARE - Coordination 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**



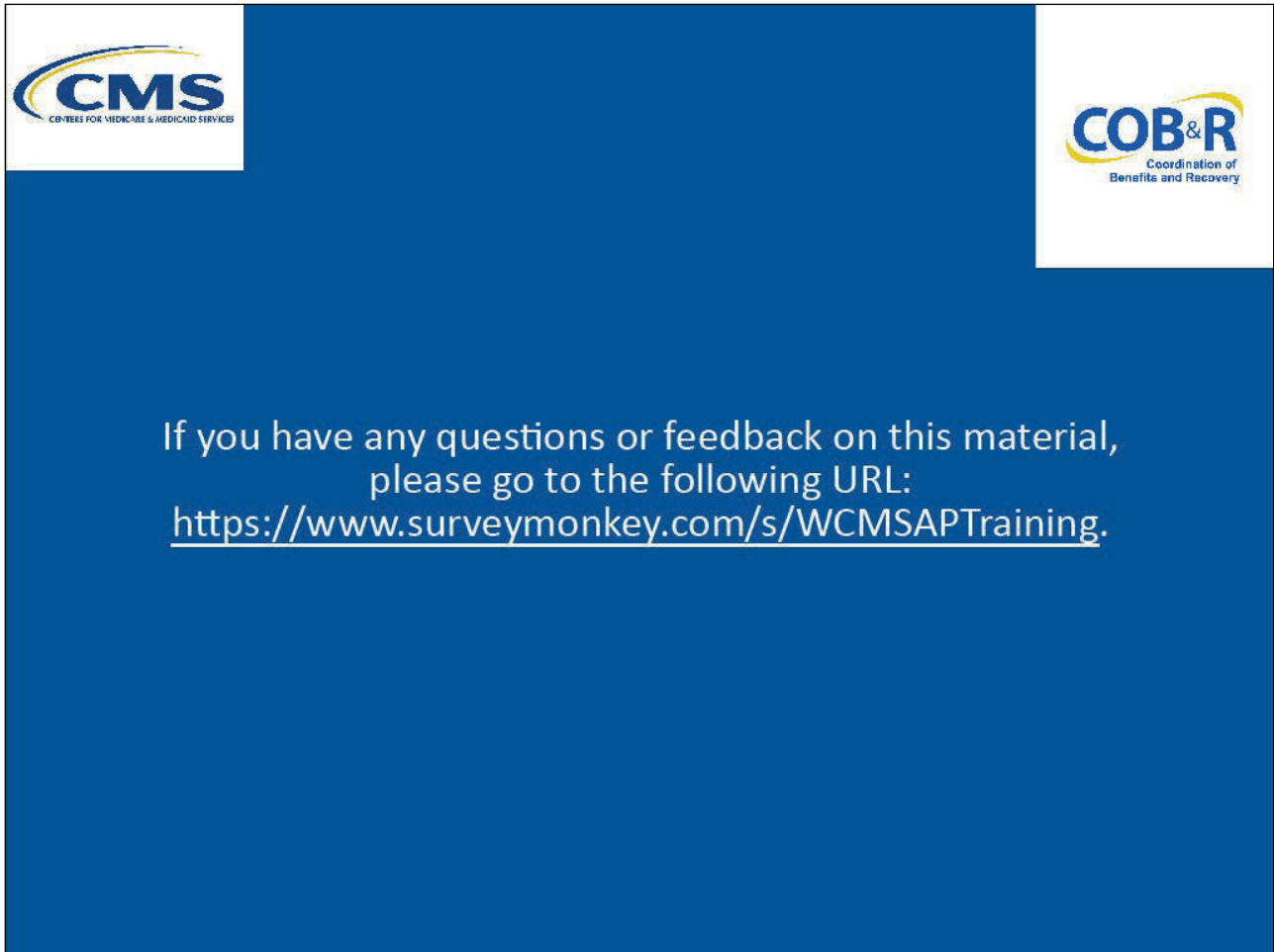
You have completed the WCMSAP Alerts course.  
The information in this course can be referenced by  
using the document at the link below:  
<https://www.cob.cms.hhs.gov/WCMSA/assets/wcmsa/userManual/WCMSAUserManual.pdf>.

**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](https://www.cob.cms.hhs.gov/WCMSA/assets/wcmsa/userManual/WCMSAUserManual.pdf).

**Slide 16 of 16 - WCMSAP Training Survey**



The slide features a blue background with two logos in the top corners: CMS (Centers for Medicare & Medicaid Services) on the left and COB&R (Coordination of Benefits and Recovery) on the right. The central text provides a survey URL.

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](#).