

Uploading and Appending Documents

Slide 1 - of 37 - Uploading and Appending Documents including Submitting Attestations

CMS
CENTERS FOR MEDICARE & MEDICAID SERVICES

COB&R
Coordination of
Benefits and Recovery

Workers' Compensation Medicare Set-Aside Portal (WCMSAP)

Uploading and Appending Documents including Submitting Attestations

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) Uploading and Appending Documents including Submitting Attestations Course.

Slide 2 - of 37 - Disclaimer

Disclaimer

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

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

Slide notes

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

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

Slide 3 - of 37 - Course Overview

Course Overview

By the end of this course, you will be able to:

- Add Additional Documents
- Delete Documents
- Replace Commingled Documents
- View and Submit Attestations
(Self-Submitters/Beneficiaries)



Slide notes

By the end of this course, you will be able to:

- Add Additional Documents
- Delete Documents
- Replace Commingled Documents
- Submit Attestations

Slide 4 - of 37 - Welcome to the WCMSAP/Login Page

Welcome to the WCMSAP

This site provides an interface for entry of Workers' Compensation Medicare Set-Aside Arrangements (WCMSA) proposals. Attorneys, Medicare beneficiaries, claimants, insurance carriers and WCMSA vendors may use this site to enter the case information directly. The site also provides attorneys, Medicare beneficiaries, claimants, insurance carriers, and WCMSA vendors with the ability to track their submitted cases and the statuses without inquiry to the Benefits Coordination & Recovery Center (BCRC) or the Centers for Medicare & Medicaid Services (CMS).

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](#)

[CMS/HHS Vulnerability Disclosure Policy](#) [Privacy Policy](#) [User Agreement](#) [Adobe Acrobat](#)

Slide notes

To manage documentation for a WCMSA case, the user must first successfully login to the WCMSAP application.

Slide 5 - of 37 - WCMSAP Account List Page

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

WCMSAP Account List

Corporate and Representative Accounts

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 the BCRC or CMS.

If the account is a Representative account, you also have the ability to view information for your WCMSA(s) and submit an annual attestation via the WCMSAP for all eligible WCMSAs where you are the identified administrator.

Professional Administrator Accounts

The WCMSAP provides an interface for you to view summary information for WCMSA cases you administer by utilizing the Case Lookup function. You can also upload account transaction files and receive corresponding response files for the WCMSAs you administer.

Click the desired Account ID link below to access the specific account and perform these functions. You may modify your personal account settings by clicking the appropriate link under the Account Settings list.

Associated Account IDs:

- [30401](#) - Corporate
- [30324](#) - Corporate
- [30184](#) - Representative
- [30185](#) - Professional Administrator

QUICK HELP

[Help About This Page](#)

Account Settings

[Update Personal Information](#)

[Change Password](#)

WCMSA Resources

[Major Medical Center Lookup](#)

Slide notes

From the WCMSAP Account List page, select the appropriate Account ID.

Slide 6 - of 37 - WCMSAP Page - Case Lookup Link

The screenshot shows the WCMSAP website interface. At the top is a dark blue navigation bar with links: Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Logoff. A 'Skip Nav' link is in the top right corner. The main content area has the heading 'WCMSAP' and a paragraph explaining the site's purpose: '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 BCRC or CMS. You also have the ability to view information for your WCMSA(s) and submit an annual attestation via the WCMSAP for all eligible WCMSAs where you are the identified administrator. Case Lookup and View Alert functions are also available. Click the desired link below to perform that function.' Below this is another paragraph: 'You may modify Account Settings by clicking the appropriate link under the Account Settings list.' Under the heading 'I'd like to...', there are three links: 'Create a New Case', 'Case Lookup' (highlighted with a red box), and 'View Alerts'. On the right side, there are two sections: 'QUICK HELP' with a link 'Help About This Page', and 'Account Settings' with links 'Update Account Information', 'View Account Activity', and 'Change Password'. At the bottom is a dark blue footer bar with links: CMS/HHS Vulnerability Disclosure Policy, Privacy Policy, User Agreement, and Adobe Acrobat.

Slide notes

Once you have accessed the WCMSAP page, you will select the Case Lookup link.

Slide 7 - of 37 - Case Lookup

The screenshot shows a web application interface for 'Case Lookup'. At the top, there is a navigation bar with links: Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Logoff. Below the navigation bar, the page title 'Case Lookup' is displayed. A paragraph explains that users can access Workers' Compensation Medicare Set-Aside (WCMSA) cases submitted through the web portal and associated with their Login ID using various search criteria. A 'QUICK HELP' button with a link 'Help About This Page' is located on the right. Below this, instructions state to enter search criteria in the provided fields and click 'Search', with a note that 'Cancel' returns to the Home page. 'Helpful Hints' are listed: WIP cases do not have a Submission Date, and Date Range is limited to a maximum of six months. Three radio buttons allow selection of 'All Cases (Both submitted and WIP cases)', 'Submitted Cases Only', or 'WIP Cases Only'. The search criteria section is divided into two main boxes. The first box, labeled 'Enter one of the following:', contains a 'Case Control Number' field and a 'Medicare ID' field followed by an 'OR' and an 'SSN' field with three sub-fields. The second box, labeled 'Date Range:', contains two date range sections: 'Case Creation Date Range' and 'Case Submission Date Range', each with 'From Date' and 'To Date' fields. At the bottom left, there are 'Clear', 'Cancel', and 'Search' buttons.

Slide notes

Users must then select the specific case they wish to manage the documentation for via the application's Case Lookup feature.

A case can be selected directly by entering the case control number and clicking the Search button.

Slide 8 - of 37 - Case Listing Page

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

Case Listing

QUICK HELP

[Help About This Page](#)

This page lists all cases entered into the Workers' Compensation Medicare Set-Aside Web Portal that are associated with your Login ID. Click on the Case Number to view the details of the case. Selecting 'Cancel' will return you to the Home page. To delete a case select the Delete function to the left of the Case Number. Submitted cases may not be deleted.

Delete	Case Number	Claimant Name	Date of Injury	Case Status	Case Location	Creation Date	Submission Date	Case Access
	123456	Smith, Jane	2010-01-19	Received	WCRC	2010-02-15	2010-02-23	Manage Access
	798654	Jones, Mary	2009-11-17	Received	WCRC	2009-11-27	2009-12-05	Manage Access
	798655	DANA, ROSE	2009-11-17	COMG	WCRC	2015-11-27	2016-01-05	Manage Access
✕	987654	Doe, John	2009-12-15	Work in Progress	Submitter	2010-01-24		Manage Access
	888888	Smith, Jane	2010-01-19	Received	WCRC	2010-02-15	2010-02-23	Manage Access
✕	555555	Doe, John	2009-12-15	Work in Progress	Submitter	2010-01-24		Manage Access
	777777	Smith, Jane	2010-01-19	Received	WCRC	2010-02-15	2010-02-23	Manage Access
✕	666666	Doe, John	2009-12-15	Work in Progress	Submitter	2010-01-24		Manage Access
	799604	Doe, John	2009-11-17	Approved	WCRC	2009-11-27	2009-12-05	Manage Access
	799604	Doe, John	2009-11-17	Closed	WCRC	2014-11-27	2014-12-05	Manage Access

Slide notes

The Case Listing page displays your account information, along with a list of all submitted Workers' Compensation Medicare Set-Aside cases associated with your account.

A case can also be selected from a case listing that was generated based on user-specified criteria.

Users can select the case directly from this screen by clicking on the specific case number for the case they wish to access.

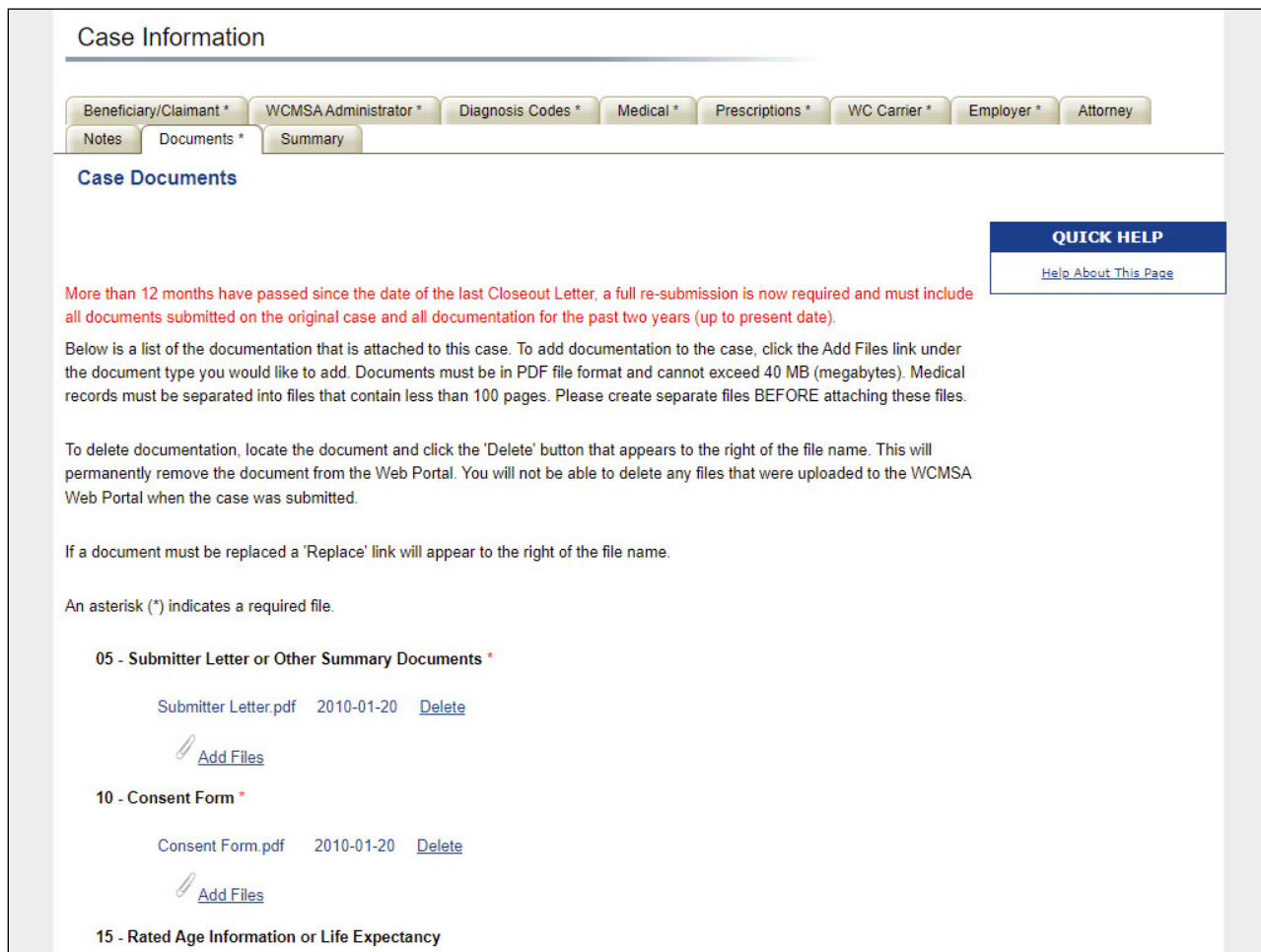
Slide 9 - of 37 - Case Summary Information

The screenshot displays a web application interface for 'Case Summary Information'. At the top, there is a navigation bar with links: Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Logoff. Below this is a breadcrumb trail: Beneficiary/Claimant * > WCMSA Administrator * > Diagnosis Codes * > Medical * > Prescriptions * > WC Carrier * > Employer* > Attorney > Notes > Documents * > Summary. The main heading is 'Case Summary', followed by 'Summary Information'. A 'Print this page' button is visible. A warning message states: 'Please review your case information. If you need to change the information, click the 'Edit' button. If you are satisfied with the information click the 'Submit Case' button to submit the case. Click 'Cancel Case Creation' to cancel the process, all data will be lost. Click "Save Work-In-Progress" button to save entered data. Print this page for your records.' A 'View Alerts' button is present. The case number is 234576. The page is divided into two columns: 'Claimant Information' and 'WC Carrier'. Each column has a 'View' button. The 'Claimant Information' section includes: Last Name: Doe MI: B. First Name: John; Date of Birth: June 12, 1966; Date of Injury: January 19, 2010; Medicare ID: 98765987B; SSN: 123-45-9763; Address Line 1: 123 Main Street; Address Line 2: Apt B; City: Baltimore; State: Maryland; Zip: 21236; Phone: ; State where injury occurred: Maryland; Submitter Type: Beneficiary/Claim Rep. The 'WC Carrier' section includes: Insurer Name: ABC Company; Policy Number: J98987654440; Claim Number: 7654309866565; Rx PCN: ; Rx BIN: ; Tax ID Number (TIN): ; Address Line 1: 754 First Street; Address Line 2: ; City: Baltimore; State: Maryland; Zip: 21236; Phone: . A 'QUICK HELP' box with a 'Help About This Page' link is located on the right side.

Slide notes

The system will display the Summary Information page for the selected case. To access the Case Documents page, users must click on the add/replace button next to the Documents section on the Summary Information page.

Slide 10 - of 37 - Documents Tab



Slide notes

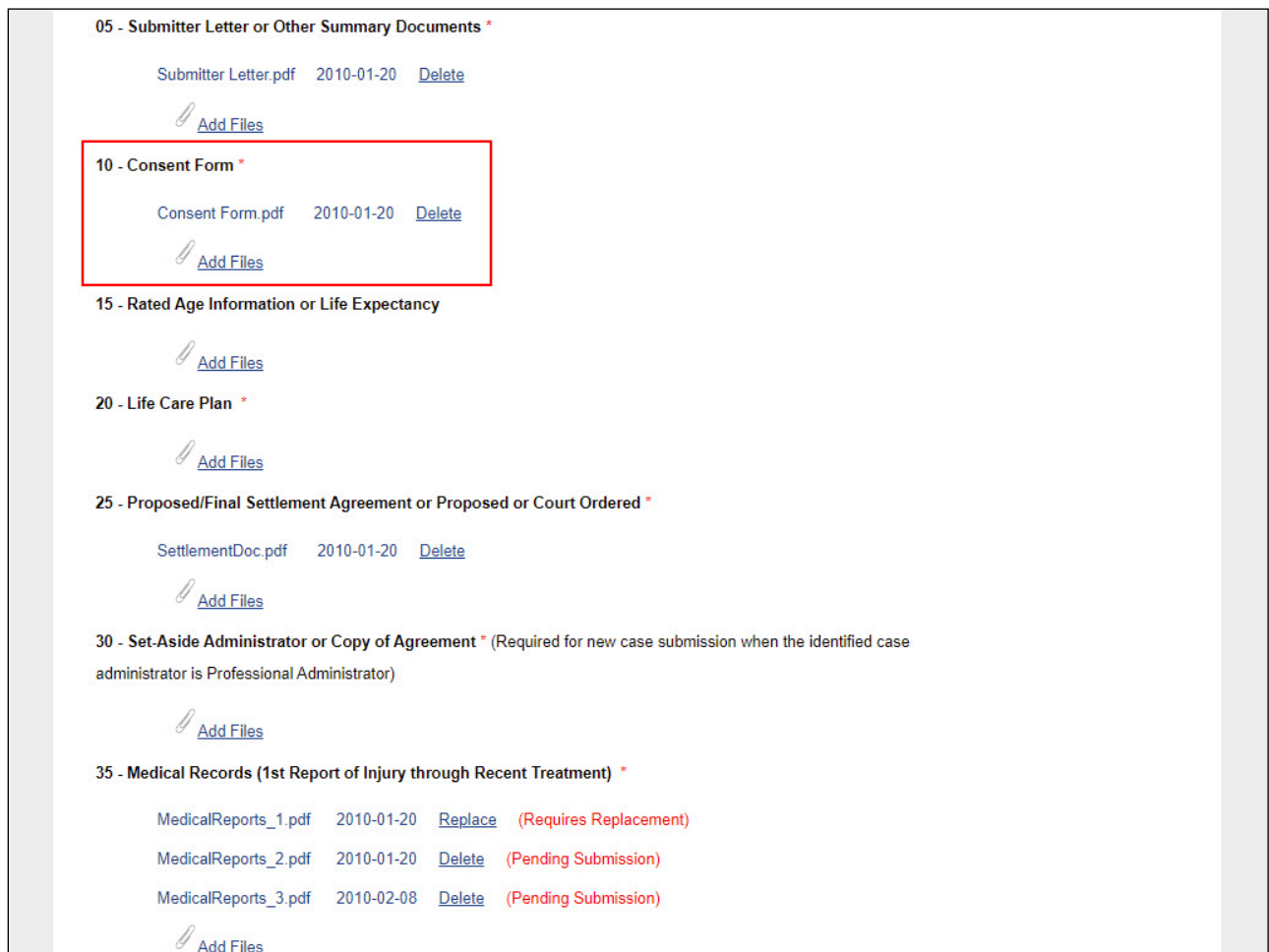
The Case Documents page is where WCMSAP users can add additional documents to an existing case, delete documents from a new or work-in-progress case, or replace commingled documents for a submitted case.

Documents with an asterisk (*) are required when submitting a case through the portal. 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 Proposed or Court Ordered,
- Set Aside Administer or Copy of Agreement,
- Medical Records,
- Payment History,
- Future Treatment Plans,
- Supplement/Additional Information

- WCMSA Attestation Submission Documentation

Slide 11 - of 37 - Consent Form - Add Files Link



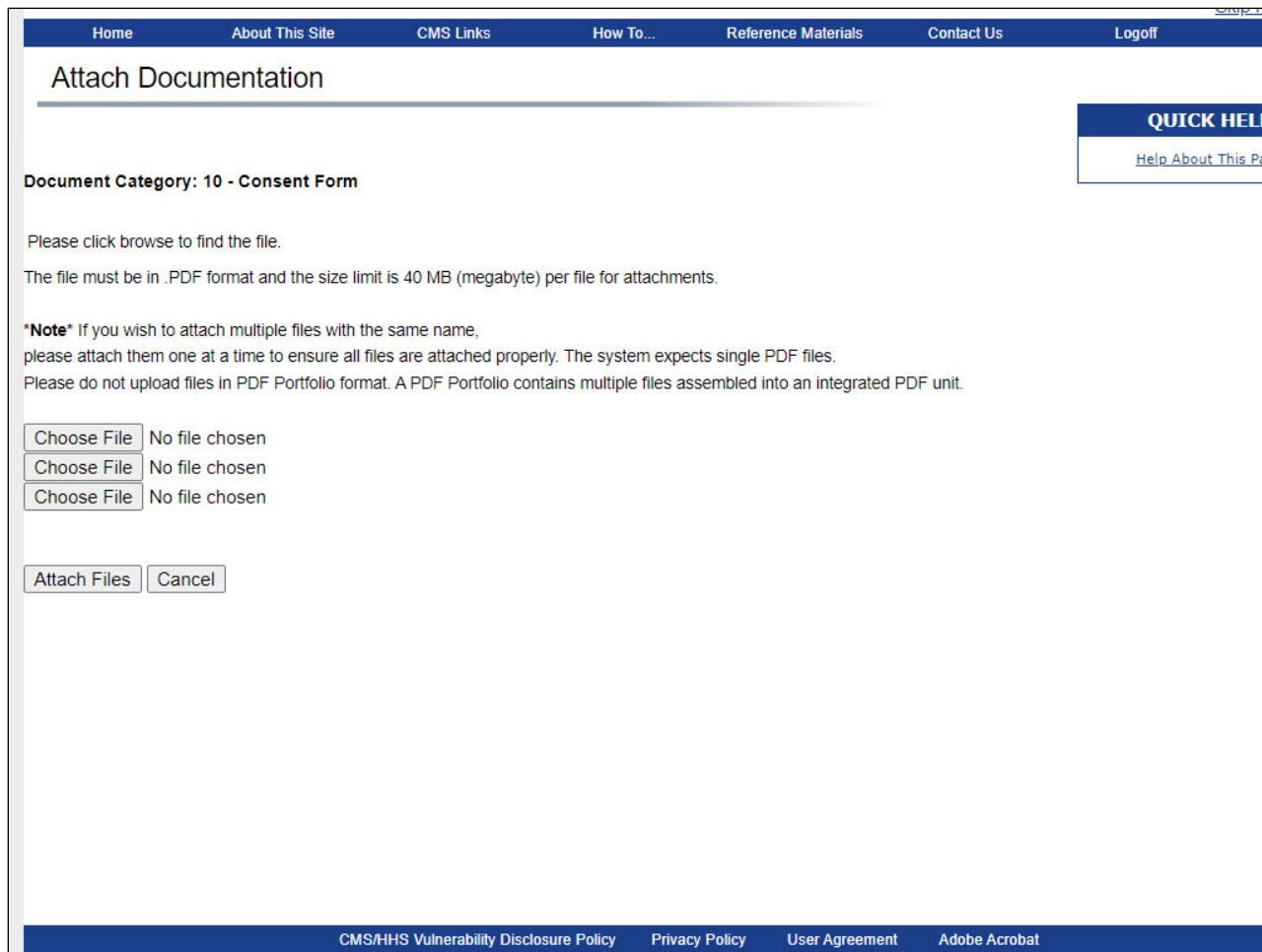
Slide notes

The “Consent Form” is the only document that is required as part of a WCMSA case. This does not have to be supplied until the user submits the case.

Note: A blank “Consent to Release Form” and an example form with instructions can be found in the “WCMSA Reference Guide.” The “WCMSA Reference Guide” is available for download at the following link: <http://go.cms.gov/wcmsa/>.

To upload a consent form, use the “Add Files” link.

Slide 12 - of 37 - Attach Documentation



Slide notes

The user may click on the Choose File button to look for files in their system to attach to the case.

If you have selected the wrong document category, click the Cancel button to return to the Case Documents page and click the Add Files link under the desired document category.

The system does not limit the number of files that may be appended to each document category, but only allows a maximum of 3 files to be uploaded at one time.

Selected files must be in PDF format. If a user attempts to attach a non-.PDF file, the system will present a message stating: "Invalid File Extension."

The maximum size of the files being uploaded at one time cannot exceed 40MB total for all files being attached (up to 3 files).

If a user attempts to attach a file that is too large, they will receive the following error: "File size is too large. Please split your files into smaller files and resubmit."

Slide 13 - of 37 - Preparing Files for Upload

Preparing Files for Upload

- Ensure that all files have been converted to PDF and do not exceed file limits
- Medical records must be separated into files that contain 100 or fewer pages
 - If a beneficiary/claimant's medical records contain more than 100 pages, create separate files before attaching the records
- The system accepts single PDF files
 - Do not upload files in PDF Portfolio format
- PDF files that meet the noted criteria can be added to a case as long as they are virus-free
 - If there is a virus, the file will be rejected

**Slide notes**

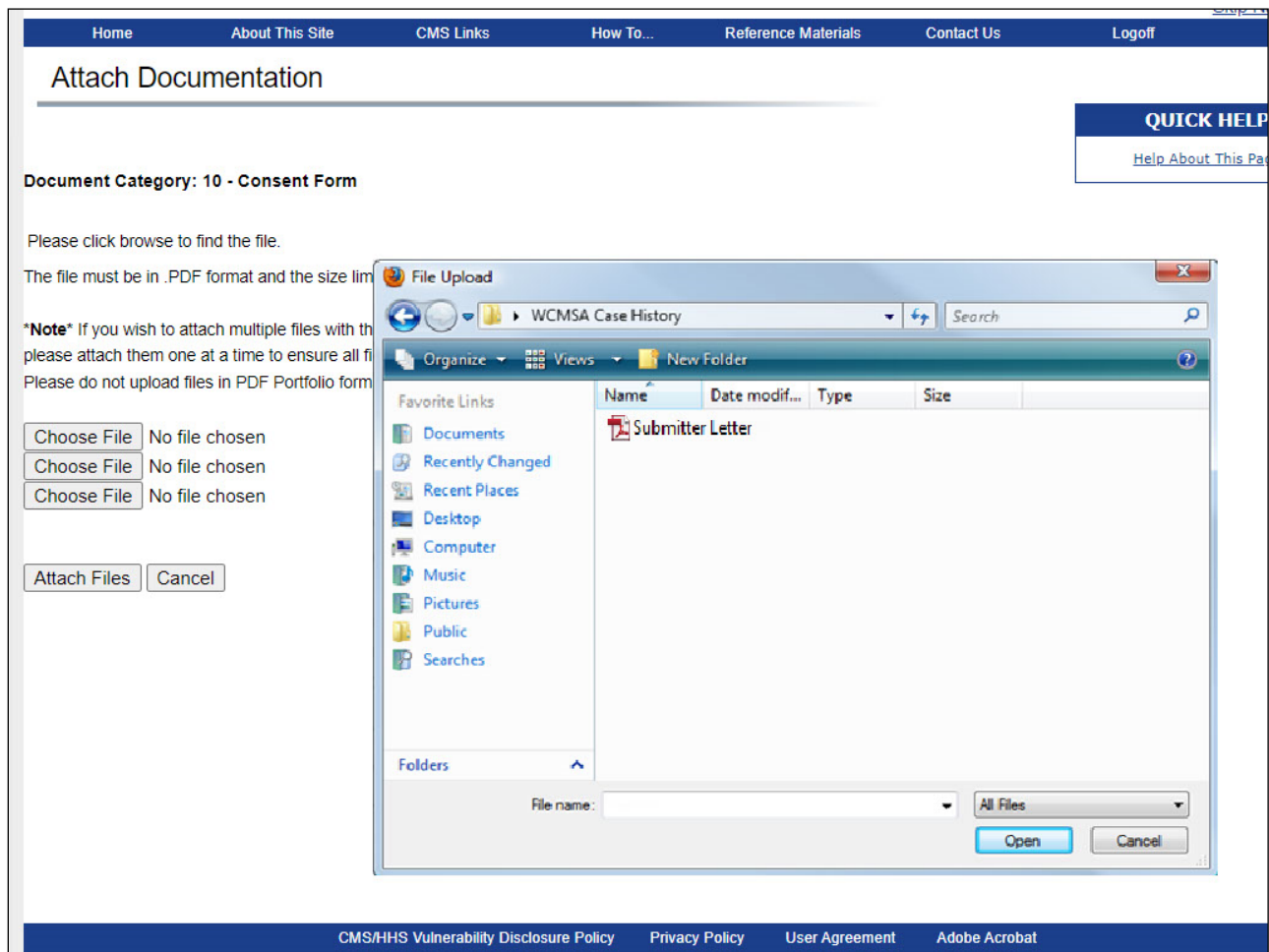
Users must ensure that all files related to a case have been converted to PDF format and do not exceed size limits. This is especially important for medical records.

The system accepts single PDF files. Do not upload files in PDF Portfolio format. A PDF Portfolio contains multiple files assembled into an integrated PDF unit.

PDF files that meet the noted criteria can be added to a case as long as they are virus-free.

If a virus is detected, the file will be rejected and the system will display a message that states "A virus has been detected, therefore your file(s) has not been added."

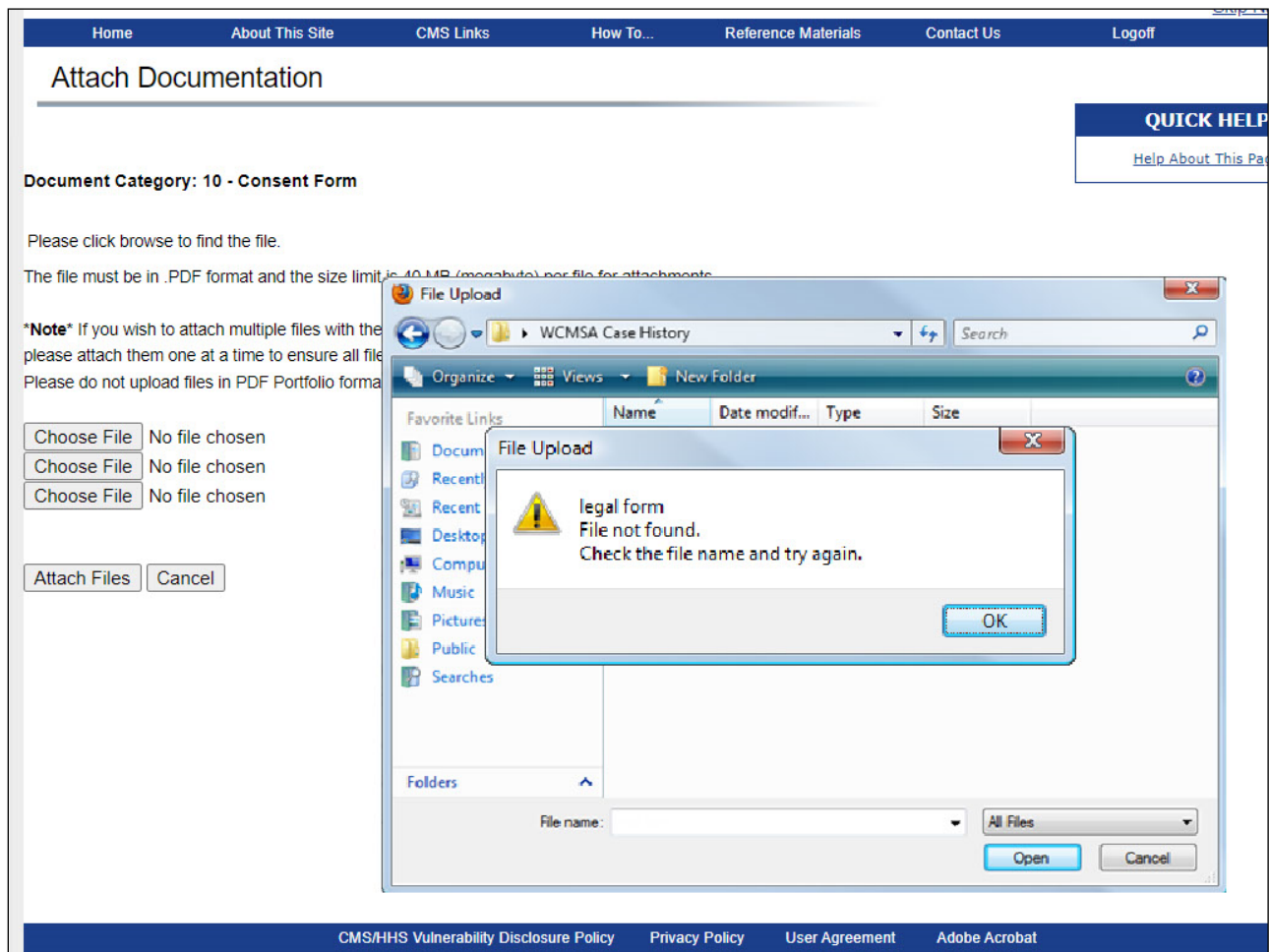
Slide 14 - of 37 - File Upload Window



Slide notes

Once the system displays the File Upload window, the user can type the file name directly and then click Open.

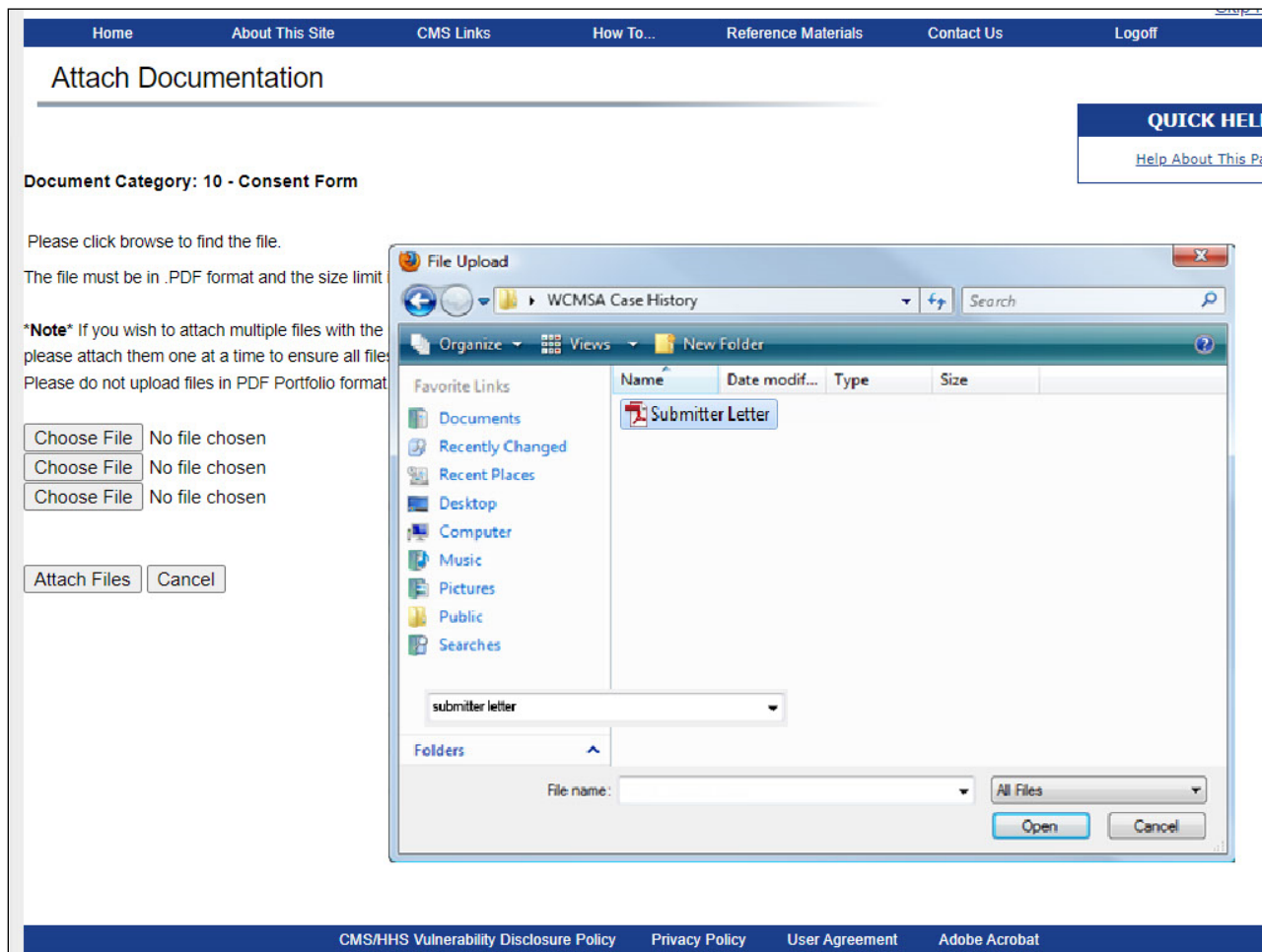
Slide 15 - of 37 - Attach Documentation



Slide notes

If the file name keyed is invalid, the system shall display the Windows error message, "File not found."

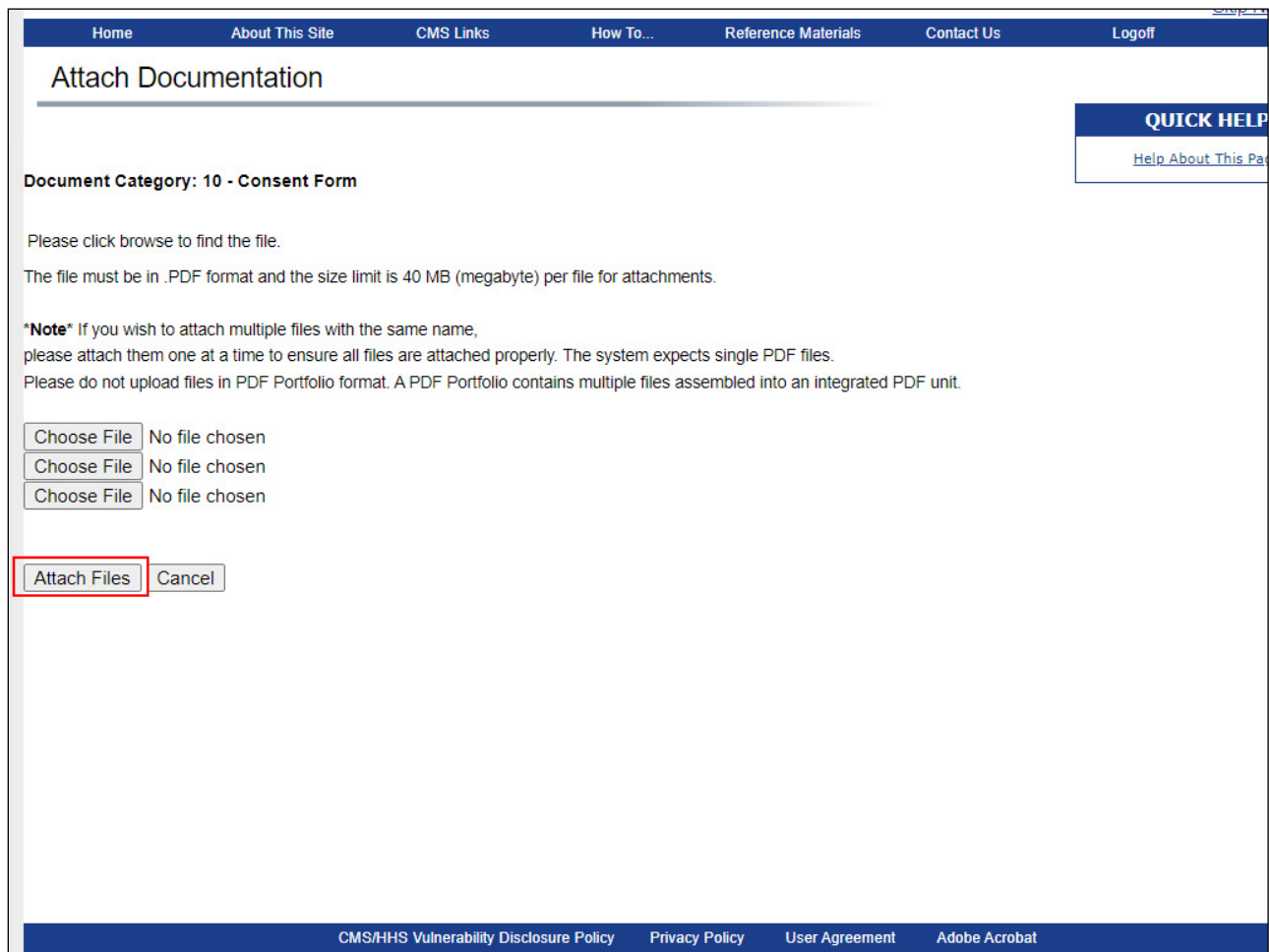
Slide 16 - of 37 - Select the PDF File



Slide notes

The user also has the ability to select the appropriate .PDF file(s) to append to the case (for the documentation category selected) by clicking on the file name and then clicking Open.

Slide 17 - of 37 - Attach Files



Slide notes

After the user has selected a file to be added to a case, they can either click Attach Files to add the file, or Cancel, to cancel the process.

Slide 18 - of 37 - Case Documents Page

Case Information

Beneficiary/Claimant * WCMSA Administrator * Diagnosis Codes * Medical * Prescriptions * WC Carrier * Employer * Attorney

Notes Documents * Summary

Case Documents

QUICK HELP
[Help About This Page](#)

More than 12 months have passed since the date of the last Closeout Letter, a full re-submission is now required and must include all documents submitted on the original case and all documentation for the past two years (up to present date).

Below is a list of the documentation that is attached to this case. To add documentation to the case, click the Add Files link under the document type you would like to add. Documents must be in PDF file format and cannot exceed 40 MB (megabytes). Medical records must be separated into files that contain less than 100 pages. Please create separate files BEFORE attaching these files.

To delete documentation, locate the document and click the 'Delete' button that appears to the right of the file name. This will permanently remove the document from the Web Portal. You will not be able to delete any files that were uploaded to the WCMSA Web Portal when the case was submitted.

If a document must be replaced a 'Replace' link will appear to the right of the file name.

An asterisk (*) indicates a required file.

05 - Submitter Letter or Other Summary Documents *

Submitter Letter.pdf	2010-01-20	Delete
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Add Files

10 - Consent Form *

Consent Form.pdf	2010-01-20	Delete
------------------	------------	--------

Add Files

15 - Rated Age Information or Life Expectancy

Slide notes

Once the Attach Files button has been clicked, the system will upload the document to the Case Documents page and add any applicable notes to the Case Notes page.

The file name, date the file was uploaded, and file status (Submitted, Pending Submission, or Requires Replacement) displays under the appropriate document category.

Once documents are added to a case, the contents of that document cannot be viewed.

Please make sure that the documents have been reviewed for accuracy prior to uploading them to a case.

The system will allow the user to delete documents from a work-in-progress case but will not allow a user to delete any documents previously uploaded to a submitted case.

To delete a document, click the Delete link that appears to the right of the file name. This permanently removes the document from the WCMSAP.

You can only delete documents from new and work-in-progress cases, and documents that have been added but not yet saved to an existing case. You cannot delete documents that were previously saved to a submitted case.

Slide 19 - of 37 - Adding Files

The screenshot shows a web interface for 'Case Information'. At the top, there are several tabs: Beneficiary/Claimant *, WCMSA Administrator *, Diagnosis Codes *, Medical *, Prescriptions *, WC Carrier *, Employer *, and Attorney. Below these are sub-tabs for Notes, Documents *, and Summary. The 'Case Documents' section contains a red warning message: 'More than 12 months have passed since the date of the last Closeout Letter, a full re-submission is now required and must include all documents submitted on the original case and all documentation for the past two years (up to present date)'. It also provides instructions on adding and deleting files. A 'QUICK HELP' button is visible on the right. The document list includes:

- 05 - Submitter Letter or Other Summary Documents *
Submitter Letter.pdf 2010-01-20 Delete
Add Files
- 10 - Consent Form *
Consent Form.pdf 2010-01-20 Delete
Add Files
- 15 - Rated Age Information or Life Expectancy

Slide notes

The system will allow users to replace specific files that have been flagged as replaceable by the Workers' Compensation Recovery Contractor (WCRC).

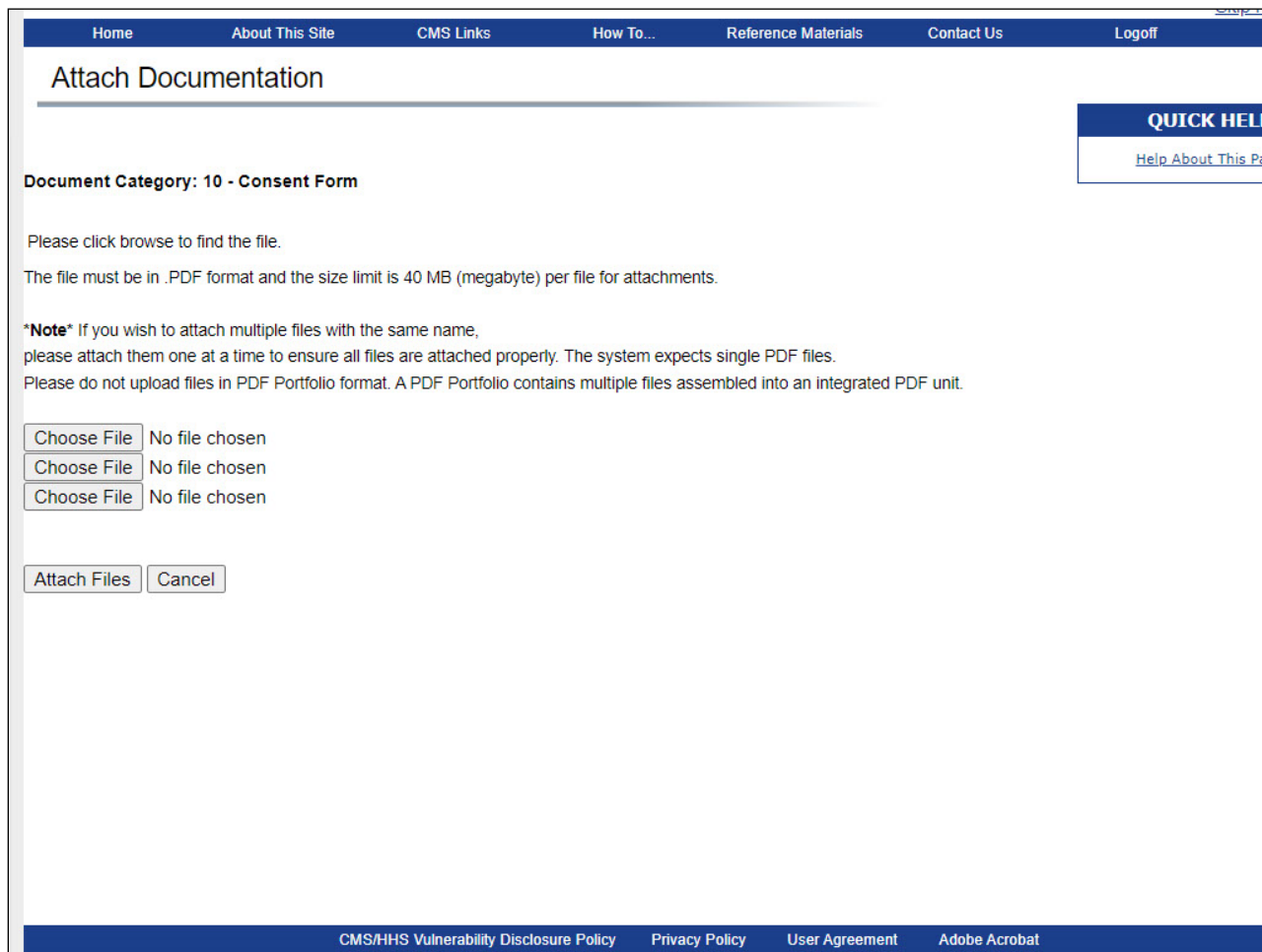
Typically, documents must be replaced when a case has been submitted and it contains commingled documents.

A commingled alert will be listed on the Alert Lookup page in this instance.

If a document must be replaced, click the Add/Replace link that appears to the right of the file name. The Add/Replace link will continue to display until you click this link and successfully upload a replacement file.

Note: On the Medicare.gov portal, only documents that have been reviewed and verified that no commingling exists will be available. If no documents have been verified, the beneficiary will see a message indicating that no documents are available to view at this time.

Slide 20 - of 37 - Attach Documentation



Slide notes

This displays the Attach Documentation page.

To replace a document, enter a new file name and path in the text box, or use the Choose File button next to the text box to search your system for the desired document.

Medical records must be separated into files that contain 100 or fewer pages.

If a beneficiary or claimant’s medical records contain more than 100 pages, create separate files before attaching the records.

To attach the selected file, click the Attach Files button. This uploads the document to the Case Documents page.

Click the “I attest that the documentation attached is complete and accurate to the best of my knowledge” check box to provide your attestation and select “Submit Files” to add the files to the case.

Slide 21 - of 37 - Upload Displays

Case Information

Beneficiary/Claimant * WCMSA Administrator * Diagnosis Codes * Medical * Prescriptions * WC Carrier * Employer * Attorney

Notes Documents * Summary

Case Documents

QUICK HELP
[Help About This Page](#)

More than 12 months have passed since the date of the last Closeout Letter, a full re-submission is now required and must include all documents submitted on the original case and all documentation for the past two years (up to present date).

Below is a list of the documentation that is attached to this case. To add documentation to the case, click the Add Files link under the document type you would like to add. Documents must be in PDF file format and cannot exceed 40 MB (megabytes). Medical records must be separated into files that contain less than 100 pages. Please create separate files BEFORE attaching these files.

To delete documentation, locate the document and click the 'Delete' button that appears to the right of the file name. This will permanently remove the document from the Web Portal. You will not be able to delete any files that were uploaded to the WCMSA Web Portal when the case was submitted.

If a document must be replaced a 'Replace' link will appear to the right of the file name.

An asterisk (*) indicates a required file.

05 - Submitter Letter or Other Summary Documents *

Submitter Letter.pdf	2010-01-20	Delete
----------------------	------------	--------

Add Files

10 - Consent Form *

Consent Form.pdf	2010-01-20	Delete
------------------	------------	--------

Add Files

15 - Rated Age Information or Life Expectancy

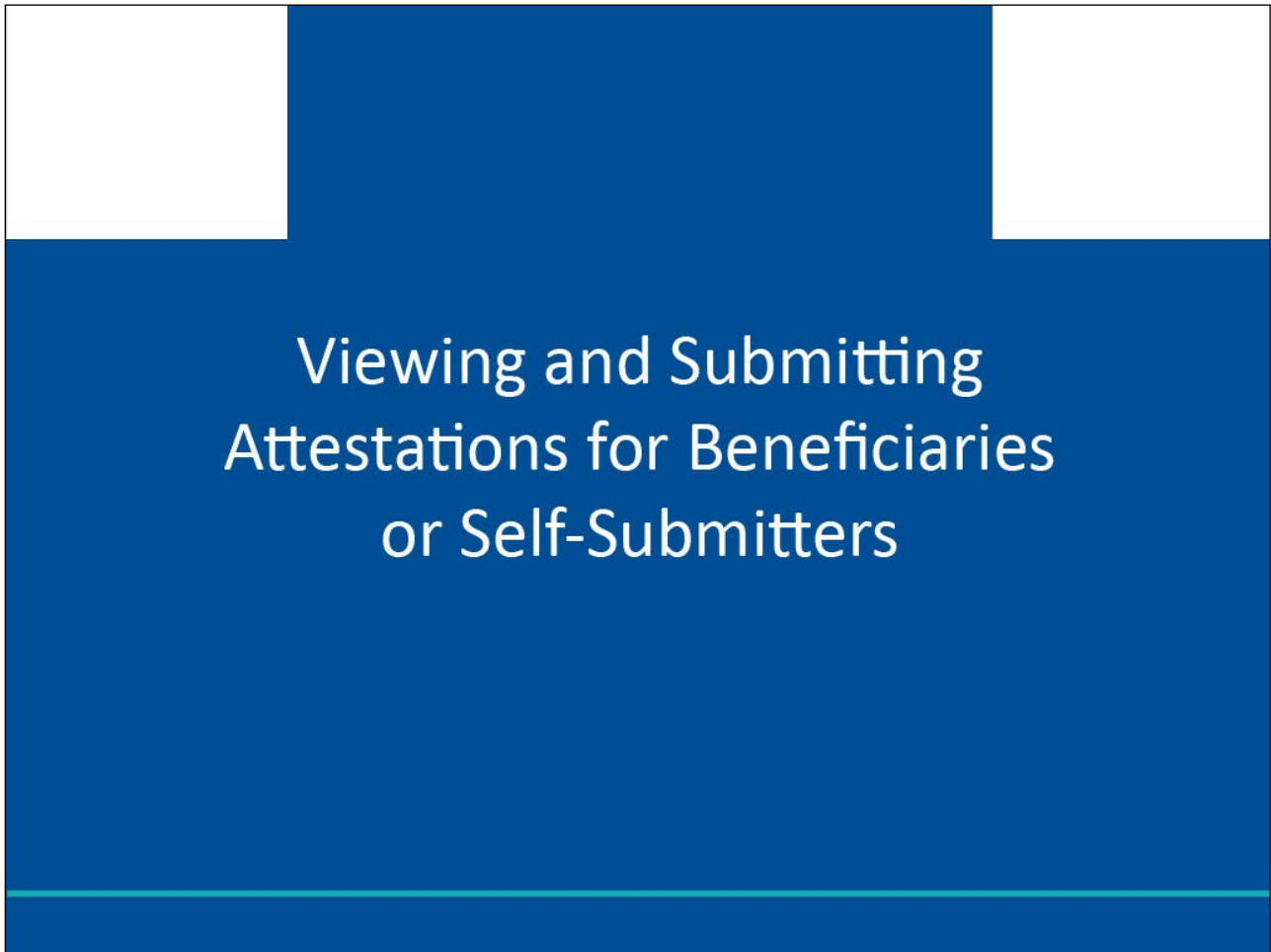
Slide notes

The file name and date the file was uploaded displays under the appropriate document category.

The new file name will appear under the proper document category, replacing the previous file name.

The Add/Replace link will be changed to a Delete link which allows you to delete the replaced file in the event it was an incorrect upload. The Delete link will continue to display until you click the Submit Files button which will submit all newly added or replaced files to the case.

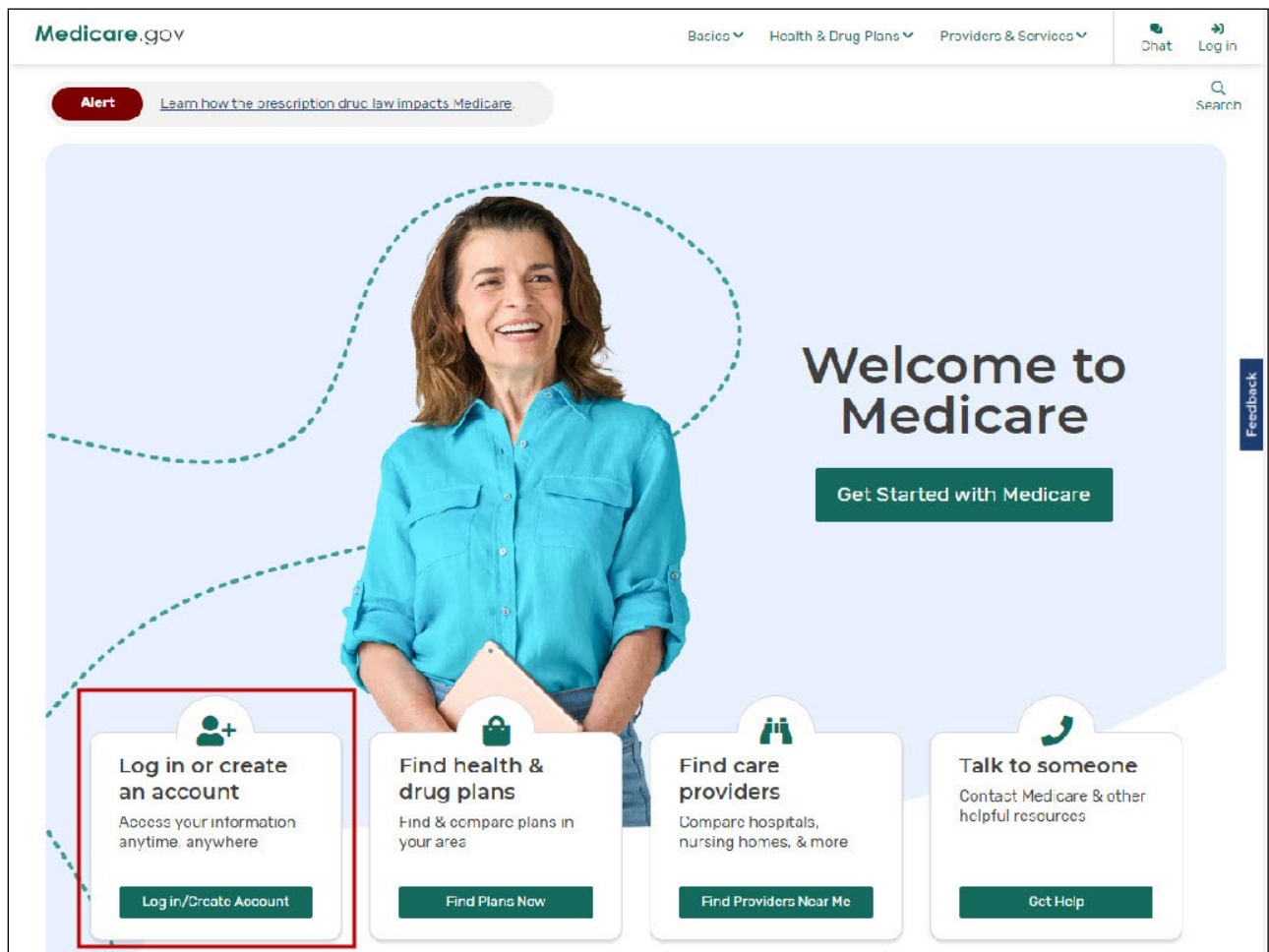
Slide 22 - of 37 - Viewing and Submitting Attestations for Beneficiaries or Self-Submitters



Slide notes

Finally, we will look at how Beneficiaries, or Self-Submitters View and Submit Attestations. Every year, no later than 30 days after the anniversary date of your Workers' Compensation settlement, the administrator of the WCMSA funds must send an attestation to Medicare's Benefits Coordination Recovery Center (BCRC) stating that the funds in the account have been used correctly. Individuals who have a CMS-approved WCMSA as part of a workers' compensation settlement agreement may only use the funds in the WCMSA account to pay for Medicare-covered medical services and Medicare-covered prescription drug expenses that are related to their workers' compensation injury, illness, or disease.

Slide 23 - of 37 - Medicare.gov

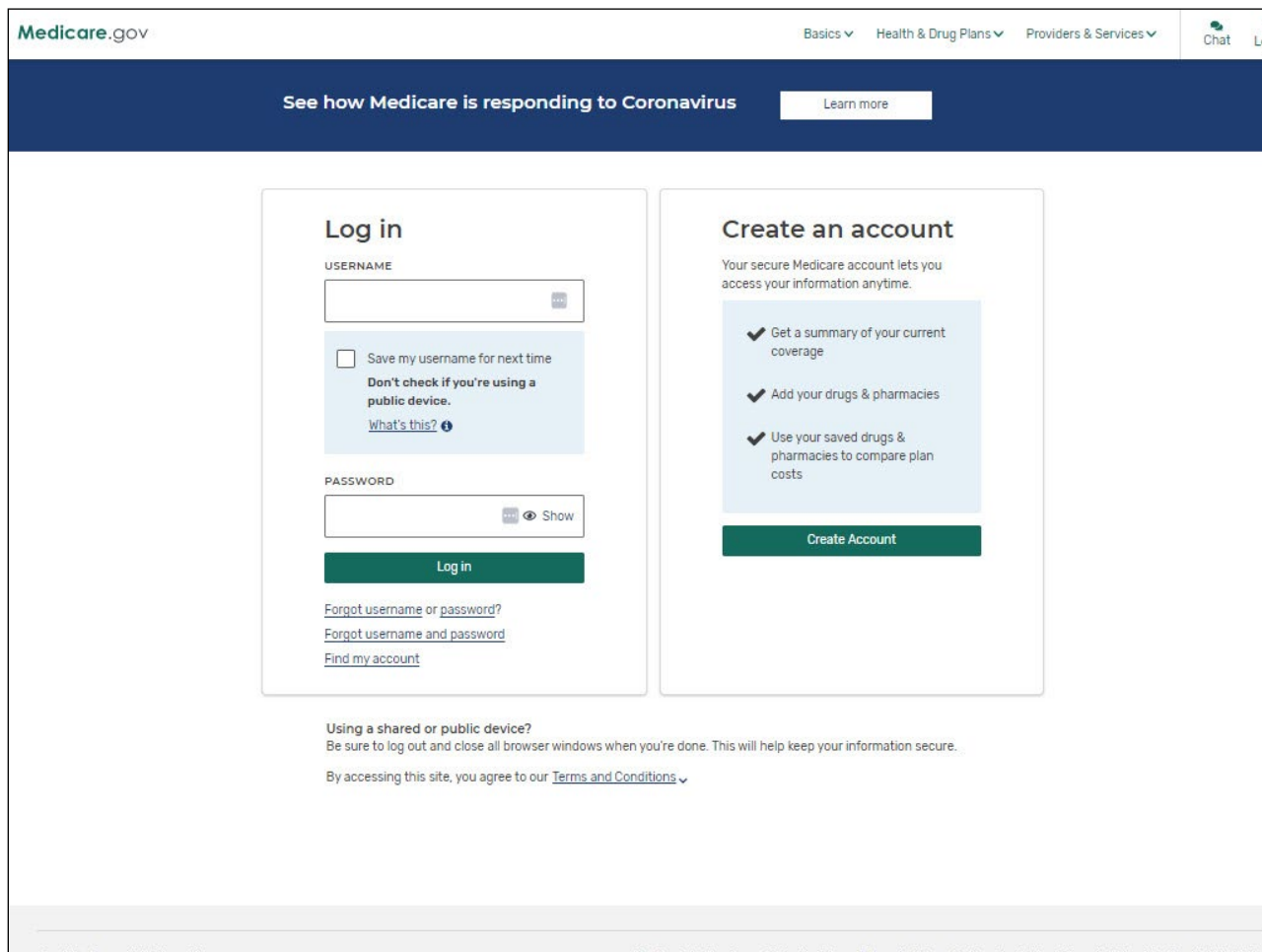


Slide notes

Beneficiaries, or Self-Submitters, access the WCMSAP via the [Medicare.gov](https://www.Medicare.gov) website.

Note: Beneficiaries who log in to Medicare.gov to access WCMSAP can now view (read-only) all documents for their cases once the documents have been reviewed to verify that no commingled information exists.

Slide 24 - of 37 - Medicare.gov Login Page



Slide notes

The beneficiary will log in to the Medicare.gov website and access the Case ID to access the WCMSAP Case Documentation page.

Note: The user must have already created a Medicare.gov account or they will need to use the create account link to create an account.

Slide 25 - of 37 - Beneficiary Case Documentation Page

The screenshot shows the 'Case Documentation' page for a beneficiary. At the top, there are logos for CMS (Center for Medicare & Medicaid Services) and COB&R (Coordination of Benefits and Recovery). A navigation bar includes links for Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Logoff. The page title is 'Case Documentation'. Below the title, the beneficiary's name 'Smith, John', Medicare ID '123456789A', and Case ID 'XXXXXX' are displayed. A 'QUICK HELP' button with a link to 'Help About This Page' is on the right. The main text explains that the page shows documentation for the selected case and provides instructions on how to search for documents using date criteria. Below this, there are input fields for 'From Date' and 'To Date' in MM/DD/CCYY format, along with 'Search' and 'Clear' buttons. A message states: 'No documents were found meeting the entered date criteria. Please try another search by changing the entered dates and selecting the Search button or select the Clear button to retrieve all available documents associated to the selected Case Number.' Another message says: 'There are no documents to view for this case at this time.' At the bottom, a table shows one document entry:

Document Category	Creation Date
Life Care Plan	01/06/2008

Slide notes

The WCMSAP Case Documentation page will appear. This page shows documentation submitted for the selected case.

Slide 26 - of 37 - Beneficiary Case Documentation Page

No documents were found meeting the entered date criteria. Please try another search by changing the entered dates and selecting the **Search** button or select the **Clear** button to retrieve all available documents associated to the selected Case Number.

There are no documents to view for this case at this time.

Document Category	Creation Date
Life Care Plan	01/06/2008
Rated Age Information or Life Expectancy	11/06/2009
Submitter Letter or Other Summary Documents	01/06/2010
Proposed/Final Settlement Agreement or Court Order	01/06/2010
Payment History	01/06/2010
Proposed/Final Settlement Agreement or Court Order	01/06/2010
Consent Form	12/20/2010
Payment History	01/06/2011
Life Care Plan	01/19/2011
Payment History	01/06/2012

[Case Listing](#) [WCMSA Attestation Information](#)

Slide notes

The bottom of the Case Documentation page displays a button to return to the Case Listing Page and another for WCMSA Attestation Information. To view or submit attestation information, click the WCMSA Attestation Information button.

Slide 27 - of 37 - WCMSA Account Balance and Attestation Submission

Workers' Compensation Set-Aside Web Portal

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

WCMSA Account Balance and Attestation Submission

QUICK HELP
Help About This Page

Every year, no later than 30 days after the anniversary date of your Worker's Compensation settlement, the administrator of the WCMSA funds must send an attestation to Medicare's Benefits Coordination Recovery Center (BCRC) stating that the funds in the account have been used correctly. Individuals who have a CMS-approved WCMSA as part of a workers' compensation settlement agreement may only use the funds in the WCMSA account to pay for Medicare-covered medical services and Medicare-covered prescription drug expenses that are related to their workers' compensation injury, illness, or disease.

To submit your attestation, review the information below, select the appropriate attestation statement, enter the applicable monies spent, and select the attestation checkbox. If you want to submit a copy of your accounting records, click the **Upload Documentation** link to upload this document. Once you are ready to submit your information, click **Submit Attestation**. Click **View Attestations** to view attestations previously submitted on the WCMSAP. Click **Cancel** if you do NOT wish to submit your attestation at this time.

Please Note: If the anniversary date for the current payout period has passed, the **Current Balance** will include the next payout amount.

Case ID: WC123456 Medicare ID: 123456A Payout Schedule: 123456A

Name: GDIT Corp Date of Injury: 4/12/2019

Total MSA: \$123.00 Settlement Date: 4/12/2019

Payout Method: Structured Annuity Initial Deposit: \$2.34

Current Balance: \$2.00 Anniversary Date: 1/1/2019

No. of Years: 2

Payment	Amount	Payment Date
1	5833.33	6/1/2017
2	5833.33	6/1/2018
3	5833.33	6/1/2019
4	5833.33	7/1/2019
5	5833.33	8/1/2019

I, the undersigned, attest that I have a **structured annuity** WCMSA and have:

Used the annual monies from the WCMSA account for the period of [] / [] / [] to [] / [] / []

Slide notes

The WCMSA Account Balance and Attestation Submission page will appear.

To submit an attestation, review the information on this page and select the appropriate attestation statement, enter the applicable monies spent, and select the attestation checkbox on the bottom of the page.

Slide 28 - of 37 - WCMSA Account Balance and Attestation Submission

Name: GDIT Corp	Date of Injury: 4/12/2019	
Total MSA: \$123.00	Settlement Date: 4/12/2019	
Payout Method: Structured Annuity	Initial Deposit: \$2.34	
Current Balance: \$2.00	Anniversary Date: 1/1/2019	
No. of Years: 2		

Payment	Amount	Payment Date
1	5833.33	6/1/2017
2	5833.33	6/1/2018
3	5833.33	6/1/2019
4	5833.33	7/1/2019
5	5833.33	8/1/2019

I, the undersigned, attest that I have a **structured annuity** WCMSA and have:

Used the annual monies from the WCMSA account for the period of [] / [] / [] to [] / [] / []

Used the monies from the WCMSA account for the period of [] / [] / [] to [] / [] / []

EXHAUSTED the annual money (and any applicable carry-over from previous years) in the WCMSA account for the period of [] / [] / [] to [] / [] / []

COMPLETELY EXHAUSTED all monies in the WCMSA account for the period of [] / [] / [] to [] / [] / []

To pay for the following:

Medical expenses: \$ [] . []

Prescription drug expenses: \$ [] . []

Taxes paid on interest earned: \$ [] . []

The interest earned on these funds was: \$ [] . []

I acknowledge and understand that failure to follow any of the Medicare requirements for the use of this money will be regarded as failure to reasonably recognize Medicare's interests and that Medicare will deny coverage for all medical treatments and prescription drug expenses due to my work-related injuries up to the total workers' compensation settlement amount.

CMS reserves the right to audit how you spend the funds in your WCMSA account. Therefore, CMS recommends that you retain your WCMSA records for a period of seven (7) years.

To upload supporting documentation, click the **Upload Documentation** link. [Upload Documentation](#)

Documentation uploaded:
 WCMSA Account Records.pdf 2010-01-20 [Delete](#)

Slide notes

You can submit a copy of your accounting records by clicking the upload documentation link to upload the document. Once you are ready to submit your information, click the Submit Attestation button.

Slide 29 - of 37 - WCMSA Attestation Submission Verification Page

CMS Workers' Compensation Set-Aside Web Portal **COB&R**
Center for Medicare & Medicaid Services Coordination of Benefits and Recovery

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WCMSA Attestation Submission Verification

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Please review the WCMSA attestation information below to verify that this is correct for **Case Number:** WC123456.

If the information is correct, click **Continue** to submit your attestation. Click **Previous** to return to the previous page to make changes. Click **Cancel** to cancel attestation submission.

Payout method: Structured Annuity
For the period of: 06-06-2019 to 08-06-2019
Medical services: \$112.30
Prescription drug expenses: \$12.30
Taxes paid on interest earned: \$12.30
Interest earned: \$20.30
New balance: \$375.60
Documentation uploaded: WCMSA Account Records.pdf

Slide notes

The WCMSA Attestation Submission Verification page will appear. You will review the attestation information and verify it is correct, then click Continue.

Slide 30 - of 37 - WCMSA Attestation Submission Confirmation Page

CMS Workers' Compensation Set-Aside Web Portal **COB&R**
Center for Medicare & Medicaid Services Coordination of Benefits and Recovery

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WCMSA Attestation Submission Confirmation

QUICK HELP
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You have successfully submitted your WCMSA attestation for **Case Number:** WC123456.
Click [Continue](#) to return to the Case Documentation page.

Payout method: Structured Annuity
For the period of: 06-06-2019 to 08-06-2019
Medical services: \$112.30
Prescription drug expenses: \$12.30
Taxes paid on interest earned: \$12.30
Interest earned: \$20.30
New balance: \$375.60
Documentation uploaded: WCMSA Account Records.pdf

[Continue](#)

Slide notes

The WCMSA Attestation Submission Confirmation page will appear stating that you have successfully submitted your WCMSA attestation for the selected case number.

Click [Continue](#) to return to the Case Documentation page.

Slide 31 - of 37 - WCMSA Account Balance and Attestation Submission Page

QUICK HELP
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Every year, no later than 30 days after the anniversary date of your Worker's Compensation settlement, the administrator of the WCMSA funds must send an attestation to Medicare's Benefits Coordination Recovery Center (BCRC) stating that the funds in the account have been used correctly. Individuals who have a CMS-approved WCMSA as part of a workers' compensation settlement agreement may only use the funds in the WCMSA account to pay for Medicare-covered medical services and Medicare-covered prescription drug expenses that are related to their workers' compensation injury, illness, or disease.

To submit your attestation, review the information below, select the appropriate attestation statement, enter the applicable monies spent, and select the attestation checkbox. If you want to submit a copy of your accounting records, click the **Upload Documentation** link to upload this document. Once you are ready to submit your information, click **Submit Attestation**. Click **View Attestations** to view attestations previously submitted on the WCMSAP. Click **Cancel** if you do NOT wish to submit your attestation at this time.

Please Note: If the anniversary date for the current payout period has passed, the **Current Balance** will include the next payout amount.

Case ID: WC123456 Medicare ID: 123456A Payout Schedule: 123456A
 Name: GDIT Corp Date of Injury: 4/12/2019
 Total MSA: \$123.00 Settlement Date: 4/12/2019
 Payout Method: Structured Annuity Initial Deposit: \$2.34*
 Current Balance: \$2.00 Anniversary Date: 1/1/2019
 No. of Years: 2

Payment	Amount	Payment Date
1	5833.33	6/1/2017
2	5833.33	6/1/2018
3	5833.33	6/1/2019
4	5833.33	7/1/2019
5	5833.33	8/1/2019

I, the undersigned, attest that I have a **structured annuity** WCMSA and have:
 Used the annual monies from the WCMSA account for the period of [] / [] / [] to [] / [] / []

Slide notes

To view previously submitted attestations, you will need to return back to the WCMSA Account Balance and Attestation Submission page.

Slide 32 - of 37 - View Attestations Button

Name: GDIT Corp	Date of Injury: 4/12/2019	<table border="1"> <thead> <tr> <th>Payment</th> <th>Amount</th> <th>Payment Date</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>5833.33</td> <td>6/1/2017</td> </tr> <tr> <td>2</td> <td>5833.33</td> <td>6/1/2018</td> </tr> <tr> <td>3</td> <td>5833.33</td> <td>6/1/2019</td> </tr> <tr> <td>4</td> <td>5833.33</td> <td>7/1/2019</td> </tr> <tr> <td>5</td> <td>5833.33</td> <td>8/1/2019</td> </tr> </tbody> </table>	Payment	Amount	Payment Date	1	5833.33	6/1/2017	2	5833.33	6/1/2018	3	5833.33	6/1/2019	4	5833.33	7/1/2019	5	5833.33	8/1/2019
Payment	Amount		Payment Date																	
1	5833.33		6/1/2017																	
2	5833.33		6/1/2018																	
3	5833.33		6/1/2019																	
4	5833.33	7/1/2019																		
5	5833.33	8/1/2019																		
Total MSA: \$123.00	Settlement Date: 4/12/2019																			
Payout Method: Structured Annuity	Initial Deposit: \$2.34																			
Current Balance: \$2.00	Anniversary Date: 1/1/2019																			
No. of Years: 2																				

I, the undersigned, attest that I have a **structured annuity** WCMSA and have:

Used the annual monies from the WCMSA account for the period of [] / [] / [] to [] / [] / []

Used the monies from the WCMSA account for the period of [] / [] / [] to [] / [] / []

EXHAUSTED the annual money (and any applicable carry-over from previous years) in the WCMSA account for the period of [] / [] / [] to [] / [] / []

COMPLETELY EXHAUSTED all monies in the WCMSA account for the period of [] / [] / [] to [] / [] / []

To pay for the following:

Medical expenses: \$ [] . []

Prescription drug expenses: \$ [] . []

Taxes paid on interest earned: \$ [] . []

The interest earned on these funds was: \$ [] . []

I acknowledge and understand that failure to follow any of the Medicare requirements for the use of this money will be regarded as failure to reasonably recognize Medicare's interests and that Medicare will deny coverage for all medical treatments and prescription drug expenses due to my work-related injuries up to the total workers' compensation settlement amount.

CMS reserves the right to audit how you spend the funds in your WCMSA account. Therefore, CMS recommends that you retain your WCMSA records for a period of seven (7) years.

To upload supporting documentation, click the **Upload Documentation** link. [Upload Documentation](#)

Documentation uploaded:
 WCMSA Account Records.pdf 2010-01-20 [Delete](#)

Slide notes

Click the View Attestations button on the bottom of the page.

Slide 33 - of 37 - View Attestation Submissions

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View Attestation Submissions

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[Help About This Page](#)

The following information has been submitted for the Case ID listed on this page. Click Cancel to return to the WCMSA Account Balance and Attestation Submission page.

Case ID: WC123456 Medicare ID: 123456A Name: GDIT Corp Date of Injury: 4/12/2019
 Total MSA: \$123.00 Settlement Date: 4/12/2019 Payout Method: Structured Annuity Initial Deposit: \$2.34
 Current Balance: \$2.00 Anniversary Date: 1/1/2019 No. of Years: 2 Payout Schedule:

Payment	Amount	Payment Date
1	5833.33	6/1/2017
2	5833.33	6/1/2018

WCMSAP Transactions:

Date Submitted	Attestation Statement	Period From	Period Thru	Beginning Balance	Automatic Deposit	Interest Earned	Medical Expenses	Prescription Drug Expenses	Taxes Paid on Interest Earned	Balance	Documents Uploaded
4/20/2019	Completely Exhausted	9/4/2018	4/1/2019	\$11,577.00		\$499.00	\$7,034.19	\$4,735.99	\$305.82	\$0.00	attch1.pdf attch1ghghgggggghvxfvggffff attch1ghghgggggghvxfvggffff attch1ghghgggggghvxfvggffff attch1ghghgggggghvxfvggffff attch1ghghgggggghvxfvggffff attch1ghghgggggghvxfvggffff attch1ghghgggggghvxfvggffff attch1ghghgggggghvxfvggffff
6/1/2018	Annual			\$5,743.67	\$5,833.33					\$11,577.00	

Slide notes

The View Attestations Submissions page will appear. The information on this page was previously submitted for the Case ID listed. All Case information will be listed at the top of the page. The WCMSAP Transactions table will display the following fields:

- Date Submitted
- Attestation Statement
- Period From
- Period Thru
- Beginning Balance
- Automatic Deposit
- Interest Earned
- Medical Expenses
- Prescription Drug Expenses
- Taxes Paid on Interest Earned
- Balance
- Documents Uploaded

Slide 34 - of 37 - View Attestation Submissions

Date Submitted	Attestation Statement	Period From	Period Thru	Beginning Balance	Automatic Deposit	Interest Earned	Medical Expenses	Drug Expenses	Paid on Interest Earned	Balance	Documents Uploaded
4/20/2019	Completely Exhausted	9/4/2018	4/1/2019	\$11,577.00		\$499.00	\$7,034.19	\$4,735.99	\$305.82	\$0.00	attch1.pdf attch1ghghhgggggghvxfvggfffi attch1ghghhgggggghvxfvggfffi attch1ghghhgggggghvxfvggfffi attch1ghghhgggggghvxfvggfffi attch1ghghhgggggghvxfvggfffi attch1ghghhgggggghvxfvggfffi attch1ghghhgggggghvxfvggfffi attch1ghghhgggggghvxfvggfffi
6/1/2018	Annual Payout			\$5,743.67	\$5,833.33					\$11,577.00	
6/1/2017	Annual Payout			\$89.66	\$5,833.33					\$5,743.67	
5/30/2017	Exhausted Annual	8/1/2016	5/5/2017	\$7,465.66		\$75.00	\$4,850.00	\$2,745.00	\$35.32	\$89.66	attch2.htm
6/25/2016	Used Annual	7/1/2015	5/4/2016	\$16,741.66		\$199.00	\$7,075.00	\$2,250.00	\$150.00	\$7,465.66	attch2.htm attch4.htm
6/1/2016	Annual Payout			\$10,908.33	\$5,833.33					\$16,741.66	
6/15/2015	Used Annual	10/17/2014	4/1/2015	\$18,333.33		\$275.00	\$5,000.00	\$2,500.00	\$200.00	\$10,908.33	attch345.pdf
6/1/2015	Annual Payout			\$12,500.00	\$5,833.33					\$18,333.33	
6/1/2014	Initial Deposit			\$12,500.00						\$12,500.00	attch345.pdf

◀
▶

Slide notes

Once you have finished reviewing the previously submitted information, click cancel to return back to the WCMSA Account Balance and Attestation Submission page.

Slide 35 - of 37 - Course Summary

Course Summary

You are now able to:

- Add Additional Documents
- Delete Documents
- Replace Commingled Documents
- Submit Attestations



Slide notes

You are now able to:

- Add Additional Documents
- Delete Documents
- Replace Commingled Documents
- Submit Attestations

Slide 36 - of 37 - Conclusion



You have completed the Uploading and Appending Documentation including Submitting Attestations course. The information in this course can be referenced by using the document at the link below:

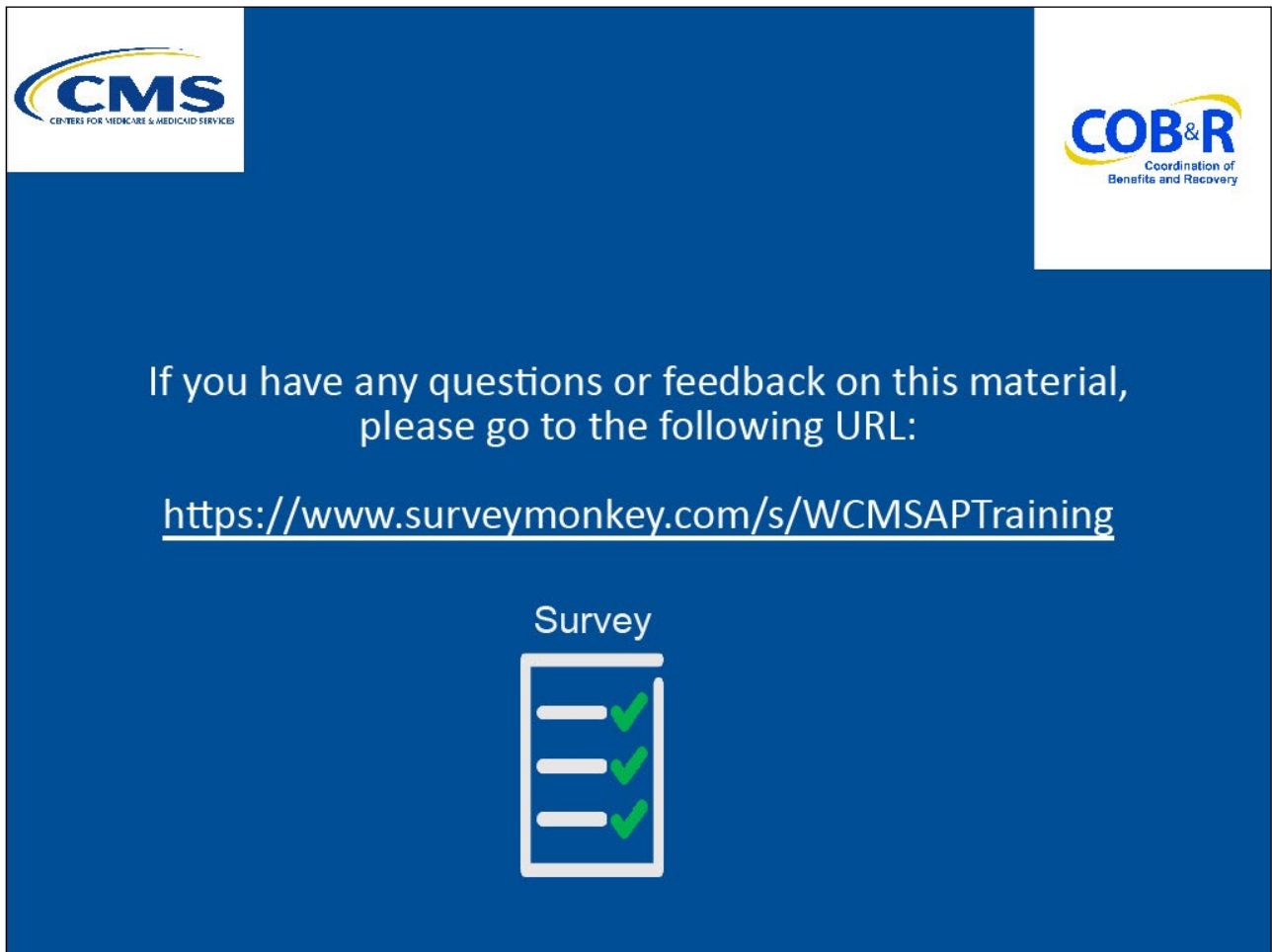
<https://www.cob.cms.hhs.gov/WCMSA/assets/wcmsa/userManual/WCMSAUserManual.pdf>

Slide notes

You have completed the Uploading and Appending Documentation including Submitting Attestations course. The information in this course can be referenced by using the document at the link below.

[WCMSAP User Manual PDF.](#)

Slide 37 - of 37 - WCMSAP Training Survey



The slide features a dark blue background. In the top left corner is the CMS logo (Centers for Medicare & Medicaid Services). In the top right corner is the COB&R logo (Coordination of Benefits and Recovery). The central text reads: "If you have any questions or feedback on this material, please go to the following URL:" followed by the URL <https://www.surveymonkey.com/s/WCMSAPTraining>. Below the URL is the word "Survey" and an icon of a checklist with three items, each marked with a green checkmark.

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).