




# Certified Medicare Secondary Payer Professional CMSP Program



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The Certified Medicare Secondary Payer Professional Program is a 32 hour program designed to give advanced knowledge and practical skills required to acquire certification in Medicare Secondary Payer Compliance.



**CERTIFIED MEDICARE SECONDARY  
PAYER PROFESSIONAL CMSP PROGRAM**

251 Florida Street, Suite 317  
Baton Rouge, LA 70821-4151  
Tel: (225) 338-0705 or (800) 277-8362

## Certified Medicare Secondary Payer Professional Program

### Who Should Attend?

The Certified Medicare Secondary Payer Professional (CMSP) credential is designed to identify those professionals who work within the workers' compensation and liability insurance industry such as insurance claims adjusters, attorneys, personal injury and special needs attorneys, life care planners, disability and rehabilitation management specialists, structured settlement professionals, and case managers who have demonstrated extensive knowledge regarding the development and application of the Medicare Set-Aside Allocation (MSA) process.

### Designation

The Certified Medicare Secondary Payer Professional Program is a three-part designation - workshop, exam and practicum. The program is offered in a two-day, 16-hour workshop taught by experts in the field of Medicare Set-Aside Allocation. The exam on materials taught in the workshop will be administered the following day. To earn the Certified Medicare Secondary Payer Professional designation, a passing exam score and a take-home case study will need to be successfully completed.

### Additional Seminar Benefits

- Designed to allow participants to select and receive comprehensive training in Medicare Secondary Payer areas of interest. Upon completion of the workshop, participants will receive a Certificate of Completion. Upon successful completion of entire course, participants will receive the CMSP Designation and Certificate.
- Complete the entire 32-hour course or just take the 16-hour workshop for enhanced knowledge of Medicare Secondary Payer issues

## Seminar Information

The CMSP classes will be held Friday, August 6 - Sunday, August 8 at The Astor Crowne Plaza located at 739 Canal Street in New Orleans, LA. Attendees must remain in class for the duration of instruction each day to receive credit. Coffee, soft drinks and snacks will be provided throughout the day.

### Fees

**Complete Certification: \$1,000**

**\* Workshop Only: \$ 700**

\* The workshop fee does not include the test and practicum.

Overnight accommodations are not included in the seminar fee. Fees are due two weeks prior to seminar attendance.

### Evaluation (Exams)

To evaluate their knowledge and proficiency, potential designee candidates are required to complete an exam, which will be administered after completion of the 16 hour course.

A 16-hour home study practicum will be given to each designee candidate. The practicum is to be completed in 30 days.

### Seminar Setting

Class attendance is limited to allow participants an opportunity to exchange information with other participants as well as with the instructor. Courses are designed to allow time for individuals to ask questions and get answers.

### Re- certification

Initial certification is for a two-year period. 24 Hours of continuing education is required every two years in a Medicare Set Aside related field.

### Please Note

Dress is business casual.  
No video or audio recordings will be allowed.  
Overnight accommodations are not included in the seminar fee.  
Seminar fees are due prior to attendance.  
You must remain in class for the duration of instruction to receive credit.

## The Program - Day One

### History of Medicare Secondary Payer Evolution

The first section of the program briefly reviews the history and overview of Medicare Secondary Payer evolution from 1965 to today. It also includes an overview of workers' compensation.

- ◆ What is Workers' Compensation
- ◆ The Benefits in Workers' Compensation
- ◆ How Medicare is Impacted
- ◆ PPD, TTD, Defenses
- ◆ Differences in State Systems

### Medicare Secondary Payer Act

This section will discuss the framework for the Medicare Secondary Payer Act. There will be a review of regulations and amendments.

- ◆ MSP Regulations and Amendments
- ◆ Future Medicare Payments vs. Past (Conditional Payments)
- ◆ Potential Consequences of non compliance - Future vs. Past

### Longshore and Harbor Workers' Compensation Act (LHWCA)

This will include an overview of current cases impacting Medicare Secondary Payers.

- ◆ Legal Update
- ◆ U.S. vs. Stricker

### Discussion of CMS Memos

There will be a review of all memos and details regarding CMS written policy and procedures.

## Certified Medicare Secondary Structure

An overview of who the entities/players (acronyms) are and how they function.

- ◆ Role of Attorney
- ◆ Role of the Allocator
- ◆ Role of the Carrier
- ◆ Structured Settlement Broker
- ◆ Medicare and Social Security Administration
- ◆ CMS
- ◆ CMS RO
- ◆ CMS Central Office
- ◆ MSP Central Office
- ◆ WCRC - JV
- ◆ MSPRC
- ◆ COBC

## Structured Settlements and Case Resolution

This area of discussion includes case settlements and case resolution's impact on the Medicare Secondary Payer.

- ◆ Annuities and Structures
- ◆ Special Needs Trust
- ◆ MSA Funding
  - ↳ Lump Sum vs. Structure
- ◆ Role of Structure Settlement Consultant
- ◆ Various Structure Vehicles
- ◆ Calculation of the Initial and Annual
- ◆ Payment for a Structured MSA Arrangement
- ◆ Rated Age
- ◆ Life expectancy

## The Program - Day Two

### Development of the Medicare Set Aside Cost Projection

This section is designed to teach the development of the MSA Cost Projection and guidelines on when a MSA is appropriate. It will discuss Medicare eligibility and coverage. It will cover not only Medicare parts A, B, C, & D, but also how to determine Medicare Allowable Care. There will also be a discussion regarding settlements of claims prior to CMS approval of a proposed MSA.

- ◆ Medicare Eligibility and Qualifications
- ◆ Trends in WCRC Recommendations
- ◆ Medical Documentation
- ◆ SSDI and Medicare "Reasonable Expectation"
- ◆ Liability MSA vs. Workers' Compensation MSA
- ◆ Costing and Coding
  - Diagnoses Codes
  - CPT Codes
  - HCPCS Codes
  - Workers' Compensation Reimbursement Schedule vs. U&C
  - CMS Calculation Requirements

### Post Settlement Medication and Administration

Methods of projecting and calculating prescription drugs.

## SCHIP Extension Act/Mandatory Reporting

### Administration and Custodial Accounts

- ◆ Self vs. Professional Administration Requirements
- ◆ Funding the Account
- ◆ Pitfalls of Professional Administration vs. Self Administration
- ◆ Role of a Professional Administrator
- ◆ Payment of Medical Benefits
- ◆ Fee Schedule
- ◆ Usual and Customary

### Submission to CMS for Approval of MSA

This section breaks down all the components in putting together a submission to CMS for approval of MSA. There will be a review of the guidelines on when/how to obtain an MSA. There will be an analysis of a CMS approved sample of submission.

- ◆ Guidelines When to Obtain an MSA
- ◆ Sample of CMS Approved Submission
- ◆ Discussion of All Components
- ◆ Allocation Proposal
- ◆ Role Play and Mock MSA
- ◆ A Sample MSA

### Conditional Payments/Medicare Liens

There will be a discussion of what conditional payments are and how to address them.

## Seminar Instructors

### Tom Files, ACA

Tom Files is the Vice President of myMatrixx, a pharmacy services company specializing in Workers' Compensation, Auto Insurance, and Pain Management. He developed and managed the prescription program for un/under-insured individuals. Mr. Files also administers the implementation of Official Disability Guidelines in Workers' Compensation pharmacy benefits management programs. He is an adjunct professor for University of Florida's Medicare Set-Aside Certification Program. Mr. Files is a Certified Case Manager. He has been a conference speaker at Savannah Annual Workers' Comp Update, Mid-Georgia Claims Association, Orlando Claims Association, Southern Association of Workers' Compensation Administrators and Mid-South Workers' Compensation Association. Mr. Files is a member of NAMSAP (Ethics Committee), Florida Association of Self-Insured, Louisiana Association of Self-Insured Employers, and The Texans.

### Wayne Fontana, CWCP

Wayne J. Fontana, CWCP, has served as legal consultant to Governors Treen, Roemer and Foster; and, for two decades, has drafted numerous legislative bills, testified before the Louisiana legislature on behalf of business interests and the aforementioned governors, and lobbied and helped pass all major workers' compensation reforms since 1983. He has served on the Advisory Council for the Office of Workers' Compensation and is a member of the LASIE Advisory Council. He is also very involved with the State Chamber, the Louisiana Association of Business and Industry, serving on its Board of Directors and Executive Committee and chairing numerous committees, councils and task forces devoted to workers' compensation and tort reform.

### Bob Gisclair, MS, CRC, LRC, LPC, CCM, CDMS, CLCP, MSCC

Bob Gisclair has over 30 years experience in the vocational rehabilitation field. He is currently self-employed with offices in Shreveport, Lafayette, New Orleans, and Baton Rouge, LA. His staff of approximately 20 employees include: vocational rehabilitation counselors, medical case management nurses, and administrative personnel. Mr. Gisclair obtained his Master's Degree in Vocational Rehabilitation Counseling from the University of Southwestern Louisiana. His Bachelor's Degree is in Psychology and was obtained from Nicholls State University. Mr. Gisclair is licensed as a Certified Rehabilitation Counselor, Certified Disability Management Specialist, Certified Case Manager, Vocational Rehabilitation Counselor, Professional Counselor, Medicare Set-Aside Consultant-Certified and Certified Life Care Planner. Mr. Gisclair is a member of the National Rehabilitation Association, National Rehabilitation Counselor's Association, Louisiana Rehabilitation Association, and Louisiana Rehabilitation Counselor's Association. He is a former member of the Licensed Professional Vocational Rehabilitation Counselors Board of Examiners. He was elected Chairman of the Board in December of 1999. He is also a past board member of the Louisiana Association of Rehabilitation Providers in the Private Sector.

### Leslie Schumacher, RN, CRRN, CCM, LNCC, CLCP, MSCC

For over 10 years, Leslie has been involved in Medicare Secondary Payer Compliance. Leslie is a Registered Nurse who actively holds both Certified Life Care Planner as well as Medicare Set Aside Consultant Certified credentials. A graduate of Drexel University, Leslie also holds the following additional certifications: Certified Case Manager, Certified Rehabilitation Registered Nurse, Legal Nurse Consultant Certified, Leslie maintains professional affiliations with the National Association of Medicare Set Aside Professionals (NAMSAP), American Association of Legal Nurse Consultants (AALNC), International Association of Life Care Planners (IALCP), and International Association of Rehabilitation Professionals (IARP). Leslie is a Board Member of IARP; Chairperson of the Education Committee for NAMSAP and has been appointed ICHCC (International Commission for Health Care Certification) Commissioner for Medicare Set Aside Allocations. She also holds the position of adjunct professor for Medicare Set Aside education with the University of Florida. Leslie's unique and engaging speaking style coupled with her extensive experience in nursing, Life Care Planning and Medicare Secondary Payer compliance has made her a featured speaker at industry conferences nationwide.

### Michael E. Westcott

Michael, an Associate, manages the Ringler Associates Wausau, Wisconsin office. His background includes over 20 years of structured settlement experience, including resolution of claims involving personal injuries, Medicare Set Asides, workers' compensation, long shore and harbor workers, common carrier and trucking, medical malpractice, religious organizations, and reinsurance, as well as an array of unique claim resolutions. He is certified in the use of structured settlements in the structured sale of real estate, businesses, divorce, non-wage employment issues, independent contractors and other taxable exchanges. He has held executive management positions with several national settlement annuity firms, and he served as National Vice President – Technical Markets for AON Brokers at world headquarters in Chicago. Michael is a nationally recognized industry speaker on Medicare, unique niche claim resolution, public lien issues and claims management. He holds insurance licenses in multiple states, and he is a member of the National Structured Settlements Trade Association (NSSTA). Other memberships include the Long Shore and Harbor Workers' Claims Association, the Trucking Industry Defense Association, a Charter Member of the National Alliance of Medicare Set Aside Professionals (NAMSAP), where he served on the Board of Directors in 2006. Michael received his Bachelor of Arts degree from the University of Wisconsin.

### Jeff Knipper, MSCC

Jeff Knipper is the Director of Medicare Services for Contact Claims Services Incorporated. Mr. Knipper has spent almost 20 years in the workers' compensation claims business focusing on Longshore/NAF claims. He has experience working with all of the regional offices of the U. S. Department of Labor, Longshore Division to resolve claims. He has provided expert testimony before Administrative Law Judges at formal hearings. His current responsibilities include Medicare Set-Aside development, CMS submissions, and MMSEA Section 111 reporting compliance. He received a Bachelor of Science in Finance from the University of South Alabama. Mr. Knipper also completed the MSA Pre-Certification Program at the University of Florida and currently holds the Medicare Set Aside Consultant Certified credential.

## 2010 Program

### The Certified Medicare Secondary Payer Professional Program will be held:

**Friday, August 6 - Sunday, August 8**

**Test is scheduled for Sunday, August 8**

**8:00 AM - Noon**

Registration will begin each day at 7:30 am with classes starting promptly at 8:00 am and ending at 5:00 pm. Breakfast and lunch will be provided. Dinner will be on your own.

### The New Orleans Astor Crowne Plaza Hotel

**739 Canal at Bourbon Street  
New Orleans, LA 70130  
Toll-Free: 888-696-4806**

The program will be held at The New Orleans Astor Crowne Plaza located in the French Quarter on the corner of Bourbon and Canal.

**Directions:** 739 Canal St, New Orleans, LA 70130.  
Cross Streets: Between Royal St and Bourbon St  
Neighborhood: Central Business District New Orleans, LA.

***The room rate will be \$99.***

The CMSP course has received continuing education credit approval for LNCC, CLCP, CRC, CCM, CWCP, and CLE through the Louisiana Bar Association; (most states will provide reciprocity), Life & Health, Property & Casualty CE through the Louisiana Department of Insurance (most states will provide reciprocity), Adjuster License CE through the State of Mississippi (most states will provide reciprocity) and is applying for CLCP credit.

#### CANCELLATION POLICY

- 2 week prior to seminar: full refund.
- Less than 2 weeks: \$150 cancellation fee.
- Failure to attend without canceling: no refund.

Name

Company Name

Address

City/State/Zip

Phone

Fax

E-Mail Address

Make Checks Payable to AMSPP  
251 Florida Street, Suite 314  
Baton Rouge, LA 70801  
For more information call 1-800-277-8362

Method of Payment

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