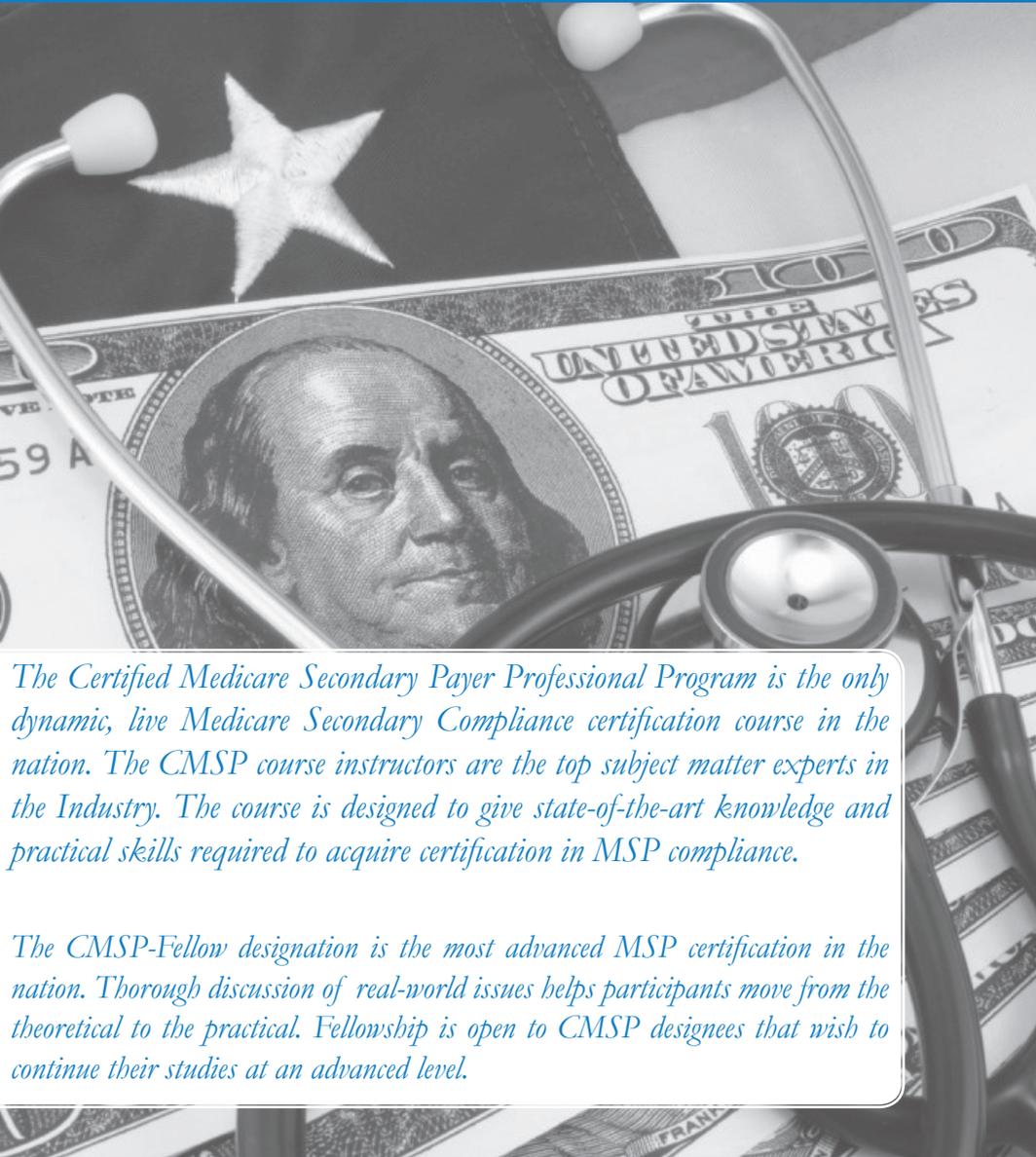


# Certified Medicare Secondary Payer Professional CMSP/CMSP-Fellow Program



*The Certified Medicare Secondary Payer Professional Program is the only dynamic, live Medicare Secondary Compliance certification course in the nation. The CMSP course instructors are the top subject matter experts in the Industry. The course is designed to give state-of-the-art knowledge and practical skills required to acquire certification in MSP compliance.*

*The CMSP-Fellow designation is the most advanced MSP certification in the nation. Thorough discussion of real-world issues helps participants move from the theoretical to the practical. Fellowship is open to CMSP designees that wish to continue their studies at an advanced level.*

# 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 and nurse 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 and MSP Compliance.



## Designation

The Certified Medicare Secondary Payer Professional Program is a three-part designation - workshop, exam and practicum. The program is offered in a three-day, 20-hour workshop taught by experts in the field of Medicare Set-Aside Allocation and MSP Compliance. The exam on materials taught in the workshop will be administered on the third 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

- The CMSP course is a live, dynamic training program. The course is updated on an ongoing basis as changes in the industry occur. You will receive the very latest MSP compliance information. While learning from the top experts in MSP compliance, participants will also learn from each other by sharing their experiences – there is no other certification program designed in this format. The design of the course creates strong networking opportunities among participants that is beneficial in an attendee's professional development.
- 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 36-hour course or just take the 20-hour workshop for enhanced knowledge of Medicare Secondary Payer issues.

# Seminar Information

Attendees must remain in class for the duration of instruction each day to receive credit. Coffee, soft drinks and meals will be provided throughout the day.

**Fees** Complete Certification: \$1,200  
\* Workshop Only: \$800  
Complete Recertification: \$800  
Fellowship: \$1000

\* The workshop only 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 20 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 instructors. Courses are designed to allow time for individuals to ask questions and receive answers.

**Recertification** Initial certification is for a two-year period. 24 Hours of continuing education is required every two years in a Medicare Secondary Payer 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

WCMS Reference Guide

CMS Structure - Role of the Players

Medicare Secondary Payer Act

Basic of Structured Settlements in MSAs

MSA Administration and Custodial Accounts

Speciality Claims

MSP Case Law Overview

Ethics

# The Program - Day Two

Development of the Medicare Set Aside Cost Projection

Medicare Set-Asides Allocations Costing and Coding

A Brief History of Drug Pricing in Medicare Set-Asides/Strategic Solutions

Submission to CMS for Approval of MSA

Section 111 Reporting

Strategic Claims Management

Medicare Conditional Payments

Liability Claims—How are They Different from WC?

# The Program - Day Three

## Course Review Exam

### 2020 Schedule

The Certified Medicare Secondary Payer  
Professional Program will be held:

June 15-17, 2020  
New Orleans, LA

SEPTEMBER 28- 30, 2020  
Baltimore, MD

*See website for hotel details.*

*Registration will begin each day at 7:30 am with classes starting promptly at 8:00 am and ending at 6:30 pm on Day 1 and Day 2*

The CMSP course has received continuing education credit approval for MSCC + ethics, CLCP/CCLCP, CRC, CCM, CWCP, MSCC, CMSP and CLE through the Louisiana Bar Association; (most states will provide reciprocity), Adjuster License CE, Life & Health, Property & Casualty CE through the Louisiana Department of Insurance (most states will provide reciprocity), and PHR, SPHR, and GPHR.

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

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or visit our website at [www.cmspprogram.org](http://www.cmspprogram.org)**

# Seminar Instructors

## **Daniel Anders, JD, MSCC, CMSP-F**

Daniel M. Anders, Esq., is the Chief Compliance Officer for Tower MSA Partners where he oversees the Medicare Secondary Payer (MSP) compliance program. In this position, Dan is responsible for ensuring the integrity and quality of all MSP compliance services and products. Based upon his 14 years of experience in working with employers, insurers, TPAs, attorneys and claimants, Dan provides education and consultation to Tower MSA clients on all aspects of MSP compliance. Dan also regularly offers expert guidance on Tower MSA's MSP Compliance Blog, has been featured in "Leaders Speak" on WorkCompWire and is regularly quoted on WorkCompCentral in regard to MSP matters. Dan is an attorney licensed to practice in the State of Illinois with extensive prior litigation experience in workers compensation. He is a member of the National Alliance of Medicare Set-Aside Professionals where he serves on the legislative committee. Mr. Anders holds a J.D. from Chicago-Kent College of Law, a B.A. from Loyola University Chicago and the Medicare Set-Aside Consultant Certified (MSCC) and Certified Medicare Secondary Payer - Fellow Professional credential.

## **Jason Creel, CMSP-F**

Jason graduated from Jacksonville State University with a Bachelor of Science degree in Education. Before coming to American Settlement Corporation in April of 2007, Jason was a Worker's Compensation adjuster with Sedgwick CMS where he received extensive training and knowledge in the Worker's Compensation arena through Sedgwick's Industry Advancement Program. Through experience and continuing education, Jason has become proficient with the Medicare Secondary Payer Act and the use of Medicare Set Asides. Jason is a licensed structured settlement consultant, property and casualty adjuster, and is currently in the process of obtaining the CPCU designation.

## **Shawn Deane, JD, CMSP-F**

Shawn is General Counsel at Ametros and leads the legal team there. Ametros is the national leader in professional administration. He has over a decade of experience practicing law and in Medicare Secondary Payer (MSP) compliance as an industry thought leader. He was previously Vice President of Medicare Compliance & Policy at ISO Claims Partners. Prior to that he practiced insurance defense litigation and healthcare law. He has been heavily involved with the National Alliance of Medicare Set Aside Professionals (NAMSAP), having served as chair of the webinar and education committees, on the Board of Directors, and was past President in 2017. He was also former executive committee member with the Medicare Advocacy Recovery Coalition (MARC). Shawn is faculty for the Certified Medicare Secondary Payer Professional Program (CMSP).

Shawn is a member of the Massachusetts Bar and is licensed in both state and federal courts in Massachusetts. His law degree is from the Massachusetts School of Law. He also holds a master's in education from Cambridge College and undergraduate degree from Berklee College of Music.

### **Greg Gitter, CMSP-F**

Greg Gitter is the President of Legacy Claim Solutions, a firm specializing in negotiating resolution of High-Exposure Workers' Compensation claims for excess carriers, employers, insurance companies and any other parties involved in Workers' Compensation claims. Greg has been involved in the Workers' Compensation arena for 16 years in various capacities including claims adjusting, investigations and management of claims staff. He has extensive experience working within the California Workers' Compensation system as well as intimate knowledge of Jones Act and U.S. Longshore & Harbor law. Over the years, Greg directed his focus on the impact of Long Term, High Exposure, Complex and Catastrophic Workers' Compensation claims and he developed a specialized skill set and specific strategies to identify and resolve these claims to the mutual benefit of all parties involved.

### **Jennifer Jordan, JD, CSMP-F**

Jennifer Jordan is a nationally recognized expert on the subject of Medicare Secondary Payer (MSP) compliance. Formerly Chief Legal Counsel and co-founder of MEDVAL, she currently is Special Counsel for the Louisiana Association of Self-Insured Employers (LASIE). For nearly 20 years, Ms. Jordan has regularly spoken at industry and educational events nationally, authored articles for both industry publications and legal resources, been designated as an expert witness in MSP litigation and been cited in judicial opinions. In conjunction with extensive structured settlement experience, Ms. Jordan is focused on finding settlement solutions and resolving claims with the best interest of all parties, not just Medicare, in mind. Ms. Jordan is Editor-in-Chief of The Complete Guide to Medicare Secondary Payer Compliance, published annually by LexisNexis since 2010, and is the recipient of a 2010 Workers' Compensation Notable Person Award and Top 25 Workers' Compensation Blog Awards from 2009 through 2014 from LexisNexis. She currently serves on the board of a number of organizations such as the Larson's National Workers' Comp Advisory Board, WorkCompCentral Comp Laude Advisory Board, Friends Research Institute, and the Medicare Secondary Payer Charitable Foundation. She was named to the WorkCompCentral President's Honor Roll in 2015 for her contributions to the industry and received a Best Blogs award in 2016 and 2017 from WorkersCompensation.com. Ms. Jordan received her J.D. from the University of Baltimore, School of Law where she was a member of the Law Review and Editor-in-Chief of the University of

Baltimore Intellectual Property Law Journal. She received her MBA from the University of Baltimore, Robert G. Merrick School of Business and B.A.s in Economics and Fine Arts from Virginia Tech.

### **John Kane, AIC, MSCC, CMSP-F**

John Kane serves as the Medicare Program Director for the Liberty Mutual Group. As a twenty-seven-year employee with Liberty Mutual John has served in a variety of claim positions including Liability and Workers' Compensation including Regional Claims Manager for Integrated Disability Management and Loss Portfolio Risk Manager. He has been actively engaged in MSP compliance over the last fifteen years. He developed Liberty Mutual's Centralized Medicare Department and is responsible for Vendor Management, Quality Assurance, MSP Compliance and a liaison to Public Affairs to advocate for Medicare reform. He is active member of the Medicare Advocacy Recovery Coalition (MARC) and former member of the Property Casualty Insurer Medicare Task Force Committee. He is also a member of the National Alliance of Medicare Set Aside Professionals and participated in panel discussions at the annual conferences. John has instructed for the Certified Medicare Set-aside Professional (CMSP) program that educates attorneys, nurses, risk managers and case managers on Medicare Secondary Payer (MSP) compliance. He is a big supporter of CMSP/CMSP-F with over 60 Liberty employees receiving their CMSP designation. Prior to Liberty Mutual, John worked in the financial sector as a financial planner with a degree in Business Management. He has an Associate in Claims (AIC), Medicare Set-Aside Consultant Certified (MSCC) and Certified Medicare Set Aside Professional Fellow (CMSP-F) designations. Hobbies include: Boating, saltwater fishing and skiing.

### **Tom Matson, CMSP-F**

Tom Matson is the Vice President of Client Development at Legacy Claim Solutions (LCS). LCS is a group that specializes in the valuation, negotiation, and resolution of high-exposure workers' compensation cases. He has been working in the insurance industry for over a decade having held claims adjuster licenses in states throughout the United States. More recently, Tom has focused his attention on Medicare Secondary Payer (MSP) compliance issues, and how polices established by The Centers for Medicare and Medicaid Services (CMS) affect workers' compensation and personal injury settlements across the country.

He is a frequent speaker at various conferences around the country and holds the Certified Medicare Secondary Payer Professional Fellow (CMSP-F) designation. Tom has also been serving as an instructor with the CMSP / CMSP -F program since 2011. He earned his degree in Public Relations from the University of Florida, and lives in Central Florida with his beautiful wife and three wonderful children.

#### **Brian McAllister, AIC, MSCC, CMSP-F**

Brian MacAllister is the Director of the Conditional Payment Unit at Liberty Mutual Insurance. During his sixteen years with Liberty Mutual, Brian has held roles in both Liability and Workers Compensation, with expertise in complex high exposure claims. Previous experience includes work as a Complex Technical Claims Specialist and Manager of a Critical Strategies Unit. In his current role, Brian is responsible for Conditional Payment Compliance, provides settlement consultation, and develops training. Brian has a degree in Criminal Justice from Northeastern University, Associate in Claims (AIC), Medicare-Set-Aside Consultant Certified (MSCC), Certified Medicare Secondary Payer Professional Fellow Designation (CMSP-F), and is a member of the National Alliance of Medicare Set Aside Professionals.

#### **Christine Melancon, RN, CM, MSCC, CMSP-F, CNLCP**

Christine Melancon currently serves as the Director of Regulatory Compliance at CLARA analytics, the leading provider of artificial intelligence (AI) technology in the commercial insurance industry. Previously, Christine served as an Operations Strategist for Cobalt Compliance Partners, LLC and was the Founder and Vice President of Operations at EZ-MSA. In the past, Christine has served as Co-Chair of NAMSAP's Education Committee, and is currently a member of NAMSAP's Board of Directors, where she serves on Executive Board as Secretary. She enjoys educating others who desire to learn more about Medicare Secondary Payer Compliance issues and is a frequent speaker at various events, as well as an instruction for the Louisiana Association of Self-Insured Employers' (LASIE) Certified Medicare Secondary Payer Professional Fellow (CMSP-F) Program, and for The International Commission on Health Care Certification's (ICHCC) Medicare Set-Aside Consultant Certified (MSCC) Program. Christine is a graduate of Charity Hospital School of Nursing and the University of New Orleans. She has successfully transferred many years of clinical experience into a successful career in the Medicare Secondary Payer Compliance industry. Christine currently holds a license as a Registered Nurse in Louisiana, as well as national certifications as a Medicare Set-Aside Consultant Certified (MSCC), Certified Medicare Secondary Payer Professional Fellow (CMSP-F), Certified Case Manager (CCM), and as a Certified Nurse Life Care Planner (CNLCP).

### **Steven J. Miller, CMSP-F, M.S. Pharm, DPh, RPh**

Steven J. Miller, CMSP-F, MSPharm, DPh, RPh, is president of PharmacyMSA.com, a multi-faceted health care consulting organization, specializing in workers compensation and liability Medicare Set Aside development and intervention, clinical geriatric medication therapy management, managed care formulary review and analysis, provider and patient clinical intervention, and managed care pharmaceutical reimbursement issues. He is an advanced degree pharmacist with over 30 years of experience in clinical pharmacy practice. He is also a part time dispensing pharmacist with Walgreens. He has served in several capacities with many types of managed care organizations, and has made numerous regional and national presentations on issues such as medication issues for the elderly, cost-effective drug therapies, and pharmaceutical benefit management. He currently serves on NAMSAP Board, several pharmaceutical advisory boards and on the editorial advisory board of ODG/ODG Treatment publication from the Work Loss Data Institute. He graduated from the University of Iowa with his B.S. in Pharmacy, and his M.S. from the University of Maryland.

### **Robert Sagrillo, JD, CMSP-F**

Robert serves as President and Chief Legal Officer for NuQuest. In this role, Robert is responsible for providing legal guidance to clients in the Medicare Secondary Payer compliance space. He works with NuQuest's legal and settlement consulting team to develop strategic solutions to Medicare Secondary Payer compliance and assist in resolving difficult claims. Robert also supports the sales team as a subject matter expert. Robert draws on his expertise in public benefits, trust and estate planning, and tax to advise his clients on the best and most cost-effective way to maximize benefits for claimants while minimizing the overall cost to and liability of insurance companies and employers. Many of the nation's largest self-insured employers and workers' compensation insurance carriers turn to Robert regularly for consultation. Robert is a recognized authority on Medicare and Medicaid subjects, frequently lecturing before local, regional and national professional and legal organizations and authoring many publications on these topics. Robert holds a Bachelor of Arts in Economics from the University of Colorado at Boulder and a Juris Doctor and Master of Laws in Taxation, University of Denver College of Law and Daniels College of Business

### **Leslie Schumacher, RM, CRRN, CCM, LNCC, CLCP, MSCC, CMSP-F, CNLCP**

For over 10 years, Leslie has been involved in Medicare Secondary Payer Compliance. Leslie is a Registered Nurse who actively holds Certified Life Care Planner and Certified Nurse Life Care Planner as well as Medicare Set Aside Consultant Certified and Certified Medicare Secondary Payer Professional (CMSP-F) credentials. A graduate of Drexel

University, Leslie also holds the following additional certifications: Certified Case Manager, Certified Rehabilitation Registered Nurse, Legal Nurse Consultant Certified, Medicare Secondary Payer Professional Fellow and Certified Nurse Life Care Planner. Leslie maintains professional affiliations with the National Alliance 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 has been elected as Board Member of both IARP and the IALCP; she is former chairperson of the Education Committee and current Board Member of NAMSAP as well as former ICHCC (International Commission for Health Care Certification) Commissioner of Medicare Set Aside Allocations. She has also participated as an instructor of Medicare Set Aside education with the University of Florida. Leslie is currently President of PlanPoint, a national provider of Medicare Set Aside Allocations as well as all other aspects of Medicare Secondary Payer compliance. 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

#### **Jennifer Shymanski, JD, CMSP-F**

Jennifer M Shymanski, JD, CMSP-F, NuQuest's Director of Implementation and Strategy, holds a law degree from Northern Illinois University College of Law and a Bachelor of Arts in Political Science from the University of Wisconsin – Stevens Point. She is admitted to practice law in the State of Wisconsin. Prior to joining NuQuest in March of 2010, she spent over ten years at Nationwide Insurance working with both workers compensation and personal liability claims teams. Jennifer utilizes her extensive experience in claim handling and negotiation to lead the NuQuest Settlement Consultant Team in working with clients to choose the correct products and services for their needs and to support and advise them throughout the settlement process. One of Jennifer's primary focuses is on assisting clients in designing, implementing and monitoring their Medicare Secondary Payer compliance programs.

#### **Thomas Spratt, CMSP-F**

With more than 40 years of experience in the insurance industry, Thomas Spratt has been at the forefront of Medicare Secondary Payer/MSP compliance since 1999 when he developed a groundbreaking MSP compliance program for the largest Workers' Compensation carrier in the nation. He also held Sr. Mgt positions in two of the premier MSP compliance providers for 11 years. He currently is an Independent Consultant who specializes in Compromise, aka Apportioned MSA's, for both Workers' Compensation and Liability matters. Tom is a former Assistant Vice President at Liberty Mutual, where he spent 15 years managing the Home Office

Workers' Compensation Claims Examining Unit. Among his various responsibilities at Liberty Mutual, Tom handled case management, exposure prediction and settlement strategy on all large Workers' Compensation losses. He also managed a diverse staff that included a team of highly skilled, long-tenured claims professionals as well as nurses trained in catastrophic injury care. He has spoken on this subject at numerous national insurance industry conferences. He has also presented programs to national audiences on catastrophic case management, exposure prediction and settlement. In addition to these areas, Tom's expertise spans all state and federal statutory jurisdictions, as well as Employer Liability suits. Tom has a long record of active involvement in the insurance industry, serving on committees for the Workers' Compensation Research Institute, the Property Casualty Insurers Association of America and the Strategic Services on Unemployment and Workers' Compensation. Tom also served on committees for the National Structured Settlement Trade Association and is a former Board member of the National Alliance of Medicare Set-Aside Professionals where he currently co-chairs the Education Committee.

#### **Meredith Warner, MD, MBA, CMSP-F**

Dr. Meredith Warner, board-certified orthopedic surgeon and serial entrepreneur, is a fellowship trained foot and ankle surgeon with extensive experience in complex foot and ankle reconstruction. In 2013, Dr. Warner opened her private practice, Warner Orthopedic & Wellness. Just two years later, she developed The Healing Sole, a patented consumer medical product designed to treat plantar fasciitis and gener foot and heel pain. Dr. Warner graduated with honors from the Medical Scholars Program at the University of Delaware. She earned her medical degree in Philadelphia from Thomas Jefferson University Medical School. Upon graduation, she completed her general surgery internship and orthopedic surgery residency in New Orleans at the Tulane University School of Medicine and her foot and ankle fellowship at the University of Texas Medical Branch in Galveston, TX. After completing her medical training, she joined the US Air Force and served two tours in Iraq and Afghanistan as a combat surgeon. Upon exiting the Air Force, she earned her MBA from Louisiana State University in 2010. Dr. Warner prides herself on being one of few female orthopedic surgeons with a private practice in the medical industry. Dr. Warner is also a Clinical Assistant Professor of Orthopedic Surgery at Louisiana State University Medical School. Among her many academic and entrepreneurial achievements, Dr. Warner is also a Delaware native, a mother of two, wife, and an avid reader.

## **Aaron Winnell, CMSP-F**

Aaron Winnell, CMSP-F is the Vice President of Operations for Medivest, a national MSP compliance company specializing in the professional administration of Medicare Set-Aside arrangements. Aaron began with Medivest as a consultant hired to develop case management software tailored to requirements of MSA custodial services. Hired in 2006, he became Director of Professional Administration Services in 2011. He's overseen general operations for Medivest since 2014. Aaron is an alumni of Marshall University and resides in Montverde, Florida with his wife and two daughters.

## **Kimberly Wiswell, CMSP-F**

Kimberly Wiswell has been engaged in the workers' compensation managed care and occupational health services industries since the late 1970's, with a focus on Medicare Secondary Payer compliance since 2005. She currently serves as the Vice President of Managed Care Operations at CLARA Analytics. Prior to joining CLARA she was a Vice President at MEDVAL, responsible for product management, and also managed operations for four years, building a technological infrastructure to facilitate the company's growth. She previously co-founded and served as Managing Director over CompProjections Medicare Set-Asides, under CompPartners. Prior to that, she served as Sr. Vice President, Operations over the Medicare Set-Aside and Specialty Network division of Coventry HealthCare's First Health Priority Services sub-division. Wiswell has extensive knowledge and experience in the area of workers' compensation managed care including Medicare set-asides, medical bill review, systems analysis/development, medical coding and reimbursement, and occupational health administration. She has provided consulting services to the CMS, the California Workers' Compensation Institute, and a number of state agencies and associations. Wiswell presents at industry conferences, seminars and training sessions concerning Medicare Secondary Payer Compliance, medical cost management, and provider coding and reimbursement. She is a member and past president of the Board of Directors for the National Alliance of Medicare Set-Aside Professionals (NAMSAP); she sits on the faculty for WorkCompCentral's WorkCompSchool; and serves as the Fee Schedule Committee Chair for a California legislative advisory body composed of top risk managers and select attorneys who advocate for industry insurance defense and related workers' compensation legislation.

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