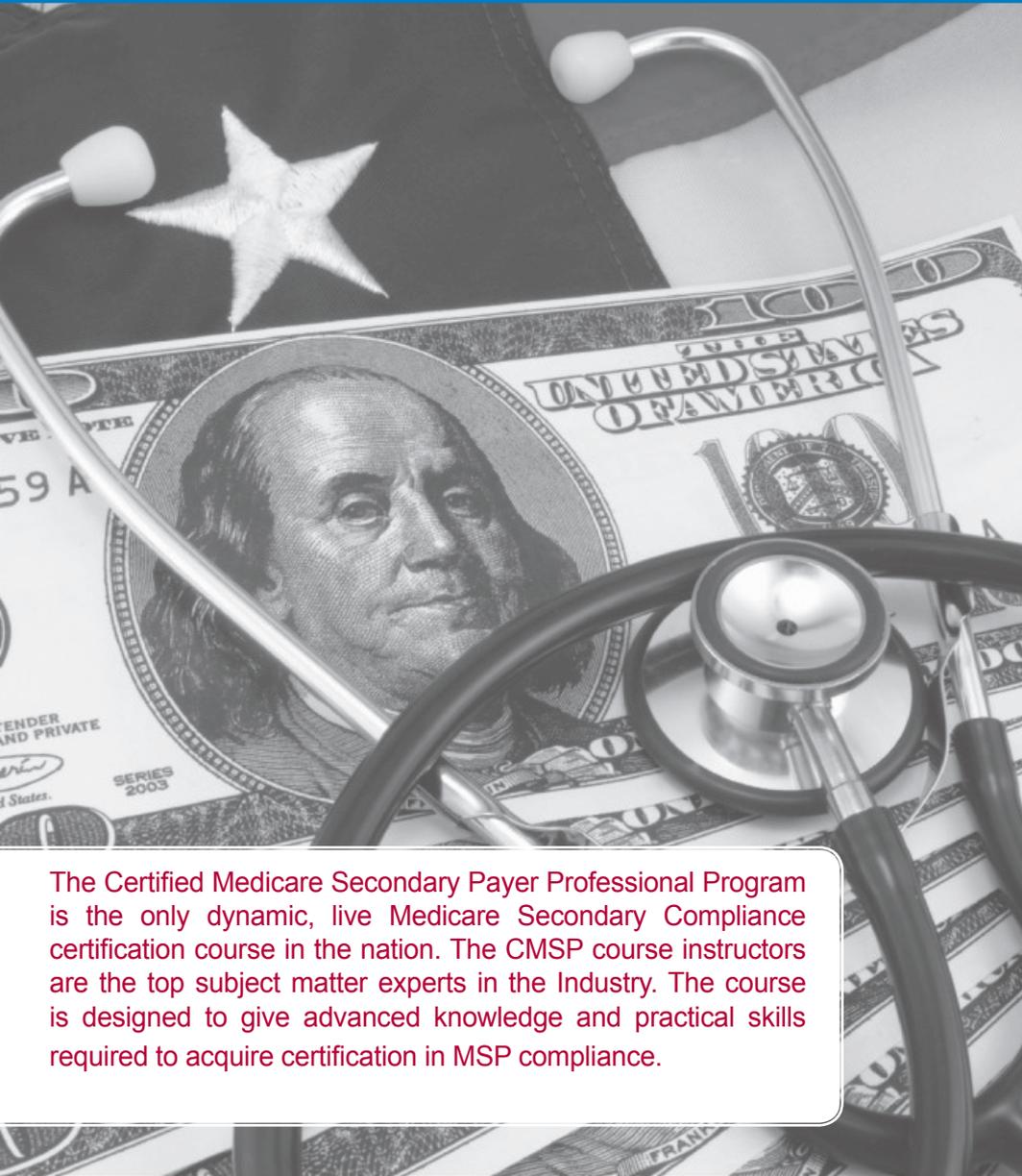


Certified Medicare Secondary Payer Professional CMSP Program



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 advanced knowledge and practical skills required to acquire certification in MSP compliance.

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.



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 snacks will be provided throughout the day.

Fees Complete Certification: \$1,200
* Workshop Only: \$ 700

* 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

Medicare Secondary Payer Act

CMS Structure

Role of the Players

Discussion of CMS Memos

Medicare Conditional Payments

Section 111 Reporting

MSP Case Law Overview

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

Specialty Claims

Structured Settlements and Case Resolution—MSAs, SNTs, QSFs

MSA Administration and Custodial Accounts

Liability Claims—How are They Different from WC?

The Program - Day Three

Course Review Exam

2017 Schedule

The Certified Medicare Secondary Payer
Professional Program will be held:

Monday June 19-Wednesday, June 21, 2017
Chicago, IL
Renaissance Chicago O'Hare Suites

Monday, September 25-Wednesday September 27, 2017
Baltimore, MD
Renaissance Baltimore Harborplace

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 7:00 pm on Day 1 and Day 2.

The CMSP course has received continuing education credit approval for MSCC + ethics, CLCP/CCLCP, CRC, CCM, CWCP, 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.

Name

Company Name

Address

City/State/Zip

Phone

Fax

E-Mail Address

**Make checks payable to LASIE or you can call
800-277-8362 to pay by credit card.**

**For More Information Call 1-800-277-8362
or visit our website at www.cmspprogram.org**

Seminar Instructors

Jason Creel, CMSP

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.

Dave Cherry, CMSP

David R. Cherry has been the driving force behind a law practice built with an emphasis on workman's compensation & serious personal injury. His practice encompasses all types of personal injury including work injuries. He is a graduate of Widener School of Law (J.D.) and Temple School of Law (Masters in Trial Advocacy). Mr. Cherry has been recognized for several distinctions throughout both his academic and professional career including: Most Promising Civil Litigator Award (Widener School of Law), Twice named to Top Lawyers (Main Line Today) and Multiple Pennsylvania Super Lawyer recipient.

Shawn Deane, JD, CMSP

Shawn Deane is the assistant vice president of Product Development at ISO Claims Partners. Shawn concentrates on all facets of Medicare Secondary Payer (MSP) compliance, but specializes in the development of new products and services. Shawn spearheads ISO Claims Partners' automated conditional payment service, CP Link. He also leads the Lien Services Department. Prior to joining ISO Claims Partners, he practiced healthcare law and insurance defense. Shawn is a member of the Defense Research Institute, has attained the Medicare Set Aside Certified Consultant (MSCC) certification, the Certified Medicare Secondary Payer Professional (CMSP) certification and also sits on the Board of Directors and co-chairs the Education Committee for the National Alliance of Medicare Set Aside Professionals (NAMSAP). Shawn is an active contributor to the ISO Claims Partners newsletter and a frequent participant to a monthly webinar series. In addition he periodically writes for publications like Risk & Compliance Management Magazine and more. Shawn is an accomplished musician, with a B.A. from the Berklee College of Music, has a Master's Degree in Education and is a graduate of the Massachusetts School of Law. He is member of the Massachusetts Bar, and is licensed in both state and federal courts in Massachusetts.

Greg Gitter, CMSP

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, MSCC, CMSP

Jennifer Jordan is general counsel of MEDVAL, LLC, a consulting firm specializing in Medicare Secondary Payer (MSP) compliance issues in insurance settlements. She possesses extensive knowledge relative to Medicare set-aside allocation recommendation and administration, conditional payment recovery and negotiation, MMSEA reporting requirements, and the underlying statutory, regulatory and administrative policies that serve as the basis of the MSP programs administered by the Centers for Medicare and Medicaid Services. Jennifer has been recognized as an expert of MSP issues by the US Department of Justice, is a frequent presenter of continuing education programs nationwide, and has been an invited author for insurance industry publications nationwide, inclusive of serving as the Editor-in-Chief of The Complete Guide to Medicare Secondary Payer Compliance published by LexisNexis. Jennifer received a 2010 Workers' Compensation Notable Person Award from LexisNexis, recognizing her as a visionary for her efforts in attempting to educate the industry in order to overcome the challenges the MSP and CMS have created in insurance settlements. Additionally, she maintains a life insurance license for structured settlement purposes and is certified by the International Commission on Health Care Certification as a Medicare Set-Aside Certified Consultant and by LASIE as a Certified Medicare Secondary Payer Professional.

John Kane, AIC, MSCC, CMSP

John Kane serves as the Medicare Program Director for the Liberty Mutual Group. As a twenty 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 ten years. He developed Liberty Mutual's Centralized MSA Department and is responsible for Vendor Management, Quality Assurance, MSP Compliance and a liaison to Public Affairs to advocate for CMS reform. He is active member of the Property Casualty Insurer Medicare Task Force Committee and was instrumental in seeking Liberty Mutual contribution funds to support the Medicare Advocacy Recovery Coalition (MARC). He is also a member of the National Alliance of Medicare Set Aside Professionals. 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) designation and is in the process of pursuing his Certified MSP Professional (CMSP) designation.

Tom Matson, CMSP

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. 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 (CMSP) designation. Tom has also been serving as an instructor with the CMSP 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.

Christine Melancon, RN, CCM, MSCC, MSCC, CMSP, CNLCP

Christine M. Melancon is the Vice President of operations for Ez-MSA, a company specializing in Medicare Set-Asides as well as other products which assist clients with Medicare Secondary Payer (MSP) compliance. Christine is a proud graduate of Charity Hospital School of Nursing in New Orleans, La., and is a registered nurse who holds certifications as a case manager (CCM), as well as a Medicare Set Aside Consultant Certified (MSCC), and was among the first in group of those who obtained the Certified Medicare Secondary Payer Professional (CMSP) designation. In addition, Christine has earned her designation as a Certified Nurse Life Care Planner (CNLCP). Christine is a member of NAMSAP (Annual Meeting Sub-Committee), the American Association of Nurse Life Care Planners, and the Louisiana Association of Self Insured Employers (LASIE). Christine is an MSCC certified instructor through the International Commission for Health Care Certification and has served as a mentor to a multitude of individuals new to MSP compliance issues, including allocators, brokers, adjusters, and attorneys.

Steve Miller, M.S. Pharm, DPh, RPh

Steven J. Miller, MSPHarm, DPh, RPh, is president of SJM Enterprises, a multi-faceted consumer-response organization, specializing in workers compensation issues, Medication Set Aside programs, formulary review and analysis, provider intervention, medication therapy management, and managed care pharmaceutical reimbursement issues. He is a clinical pharmacist with many years of experience in managed care workers compensation, Medicare, and Medicaid pharmacy consulting. 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, for more than 30 years. He currently serves on 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.

Fran Provenzano, RN, BSN, CDMS, CCM, QRP, CLCP, MSCC, CMSP

As President and CEO of MSA Specialists, Fran has been on the cutting edge of the Medicare Secondary Payer Compliance and was the second professional in the Nation to receive MSCC certification. MSA Specialists is a national service provider of MSA Compliance for claims from New England to Hawaii. She serves as the lead Instructor to the University of Florida for the purpose of providing educational seminars around the nation. These seminars are to educate and train prospective MSA practitioners. Fran has held these seminars (under the UF's direction) in several states and in an online format. These classes are preparation for national certification of new MSA practitioners. Through her involvement with the University of Florida and her leadership role in NAMSAP, Fran is a nationally recognized authority on MSAs, and a highly sought after speaker on the subject. She has presented at National nursing conferences, on a variety of subjects, since the mid-80's. In addition, Fran has authored the MSA section of the Legal Nurse Consultant Textbook and has provided online training for NAMSAP (National Alliance of Medicare Set-Aside Professionals). Fran has served as Vice-President and currently remains a board member of NAMSAP. Fran received her Bachelor of Science in Nursing from the University of Tampa and holds credentials and certifications in the following areas; Certified Disability Management Specialist; Certified Case Manager, Qualified Rehabilitation Provider, Certified Life Care Planner, Medicare Set-Aside Consultant Certified, Certified Medicare Secondary Payer Professional.

Leslie Schumacher, RN, CRRN, CCM, LNCC, CLCP, MSCC, CMSP, 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 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 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.

Robert Sagrillo, JD, LLM

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.

Thomas F. Spratt, CMSP

With more than 40 years of experience in the insurance industry, Tom is an authority on issues related to Medicare compliance and Claims. As Vice President – Settlement Solutions, Tom is responsible for the Nuquest Settlement Consultant Team. He oversees assessment of clients' Medicare compliance programs, training of claims staff and client settlement strategies for costly or complex cases involving both Workers' Compensation and Liability. Tom is a former Assistant Vice President at Liberty Mutual, where he spent 15 years managing the Home Office Workers' Compensation Claims Examining Unit. While at Liberty Mutual, in 1999 Tom developed a ground-breaking and widely emulated Medicare Set-Aside compliance program, long before CMS provided any guidance. Tom currently co-chairs the Education committee for NAMSAP (National Alliance of Medicare Secondary Payer Professionals) and also serves on the faculty of the CMSP designation program (Certified Medicare Secondary Payer), it is the only program where both the law and allocations make up the curriculum. He received a BA in Economics and Business from St. Anselm College.

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