



# 01-15-2019 Module 1 - Understanding Medicare [CEU] Course 1 of 2 (CMS National Training Program)

## *Continuing Education (CE) Activity Information & Instructions* (Live Activity #: WE-L01152019-NTP)

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## Activity Information

### Activity Description

This is course 1 of 2 in the Module 1 - Understanding Medicare [CEU] series. It explains enrollment and eligibility for Medicare Program, the roles and responsibilities of the agencies responsible for Medicare, cost and coverage under Part A and B, and why enrolling on time is important.

### Target Audience

This activity is designed for Centers for Medicare & Medicaid Services (CMS) partners and stakeholders who need to earn continuing education units (CEUs), such as clinical health care administrators, nurses, social workers, and others who are new to the Medicare Program and those with experience who want a refresher.

### Learning Objective

By the end of this presentation, participants should be able to:

- Identify enrollment and eligibility requirements for the Medicare Program
- Identify the roles and responsibilities of the agencies responsible for Medicare
- Recognize the parts of Medicare and coverage options
- Recall cost and coverage requirements under Part A and B
- Recognize how the appeals process works
- Describe coverage related enrollment penalties

### Participation

Register for the webinar, participate in the webinar, and access and complete the assessment and evaluation on the Centers for Medicare & Medicaid Services (CMS) National Training Program (NTP) page at <https://cmsnationaltrainingprogram.cms.gov/ntp-courses>.

### Speaker Bios & Disclosures

No one in a position to control the content of this activity has anything to disclose. The planners/developers of this activity have signed a disclosure statement indicating any relevant financial interests. This activity was developed without commercial support.

**Kim Lare, BS, developer/planner/presenter**, has been employed by the Centers for Medicare & Medicaid Services (CMS) for over 15 years. Ms. Lare has worked in leadership and Medicare training development, delivery, and technical instruction since 2008. During this time, she served in a variety of roles, including Acting Deputy Director for the Division of Talent Development, Team Lead for Training Technology, and a CMS National Training Program (NTP) Training Specialist. Ms. Lare has worked extensively to design and develop online training about common Medicare coverage choices and different personal situations, including: "65 and still working," "When is Enrollment Automatic," and "Immigrants and Medicare." Ms. Lare reviewed and researched Medicare coverage rules and regulations, and programs operations manuals in the development process. In addition, she worked with a variety of Medicare subject matter experts (SMEs). Prior to 2008, she worked on outreach and education efforts in the Office of the Regional Administrator at the CMS Atlanta Regional Office. Ms. Lare has conducted seminars and webinars for CMS partners and beneficiary audiences and developed appropriate training materials and handouts.

Ms. Lare earned a Bachelor of Science degree in Business from the University of Maryland, College Park.

**Leslie Long, MA, developer/planner**, has been employed by the Centers for Medicare & Medicaid Services (CMS) since May 2014. In her current role as a Health Insurance Specialist, she is responsible for preparing a variety of Medicare training materials, PowerPoint presentations, and job aids for public consumption. Ms. Long has written, edited, and maintained web-based and printed Medicare training materials.

Ms. Long earned a Master of Arts degree in Organizational Communications from Bowie State University.

**Melissa Moreno, BBA, developer/planner/presenter**, brings more than 12 years of intensive involvement with the Medicare Program and marketing from both private industry and the Centers for Medicare & Medicaid Services (CMS). She has been immersed in Medicare education at the community level. As a Former Agent and Plan Sponsor Territory Representative, she worked directly with beneficiaries, their families and advocates, and state and local government officials. Ms. Moreno worked to create learning curricula for health insurance agents, producers, and brokers that work in the Medicare product field. She has developed regulatory and manual guidance and learning curricula for federal, private sector, and public audiences about the Medicare Program.

Prior to coming to the CMS National Training Program (NTP), Ms. Moreno worked at the CMS Division of Surveillance, Compliance, and Marketing. As a Member of the Marketing Policy Team, she was charged with drafting agent and broker regulations, leading the CMS Agent/Broker Training & Testing Program, providing guidance and interpretation of CMS marketing policy, and leading agent/broker plan sponsor audit teams. Ms. Moreno also provided technical expertise concerning various marketing operations to our Medicare Part C and D Plan sponsors, CMS Regional Offices, and industry stakeholders. She has continued to support the agency's mission with the National Training Team by providing virtual and in-person training about all CMS programs.

Ms. Moreno earned a Bachelor of Business Administration degree in Health Care Management from the American Intercontinental University.

**Susan Razik, BA, presenter**, has been employed by the Centers for Medicare & Medicaid Services (CMS) since 1992. Ms. Razik oversees the CMS National Training Program, which is tasked with providing education on CMS' programs internally and externally to ensure beneficiaries make informed health care decisions. She is also responsible for the development of training products and training events to include annual nationwide workshops and webinars. Ms. Razik's experience includes serving as the Lead Writer for the Medicare & You handbook for 10 years. She also managed the division that developed the handbook and other Medicare-related publications for two years prior to assuming the Director of Training position in the Creative Services Group in the Office of Communications, in 2012. Her experience also includes developing educational products, including publications, video scripts, web content, training modules, presentations, job aids, and web-based training courses to educate partners, stakeholders, and others on the intricacies of CMS' programs.

Ms. Razik earned a Bachelor of Arts degree in Communications Studies from the University of Maryland University College.

**David Santana, developer/planner/presenter**, is a Health Insurance Specialist at the Centers for Medicare & Medicaid Services (CMS) and has served as a Subject Matter Expert and Lead Trainer for the National Training Program Division (NTP) in the Office of Communications since 2005. In this role, Mr. Santana coordinates the research, development and technical review of educational materials for partners, federal, states, local agencies, and national organizations. He delivers regular public speeches including national conferences, and provides policy clarifications on all aspects of CMS programs. His work experience includes researching and conducting extensive legal research and review of the laws, policies, and regulations governing the Medicare program, and developing educational materials to train staff and stakeholders. Throughout his training experience, Mr. Santana has developed techniques that complement a variety of presentation tools to effectively reach the variety of audiences who wish to learn and understand CMS programming. Mr. Santana has given keynote speeches, provided slide presentations, conducted webinars, and used interactive media effectively with various groups. In addition, he has engaged in public education efforts with local and national television and radio shows.

Prior to joining the NTP, Mr. Santana was employed at the CMS Philadelphia Regional Office from November 2002 through November 2005, where he served as a Regional Trainer Coordinator, State Manager, and Business Function Expert. He was employed at Trailblazer Health Enterprises, a Medicare Carrier Contractor, as a Supervisor and Technical Specialist from February 1999 through November 2002.

**Karie Watson, MS, presenter**, has worked as an educator and trainer in the health care industry for over 20 years and is currently serving as a Health Insurance Specialist at the Centers for Medicare & Medicaid Services (CMS) with the Office of Communications in the Division of Training. Ms. Watson's experience has focused on designing and delivering education and training programs for a range of public and private organizations, including the Maryland Department of Health and Mental Hygiene, a Medicaid health insurance plan, the Center for a Healthy Maryland, and Humana. In these roles, she had the opportunity to work with diverse populations within communities and organizations across Maryland, state and local government officials, the military, health plan and hospital administrators, healthcare providers, health plan members, and advocates.

Ms. Watson has been a Certified Health Education Specialist by the National Commission for Health Education Credentialing since 1997. She has conducted training on a range of Medicare training modules and advanced training topics. In addition, she has conducted presentations on Medicare at the National Training Program Regional Workshops for the last three years.

Ms. Watson earned a Master of Science degree in Health Sciences and Health Care Administration from Towson University.

**Marc Wernick, MPH, developer/presenter**, has served as a Training Specialist at the Centers for Medicare & Medicaid Services (CMS) since January 2017 and has over 20 years of marketing and communication experience. Mr. Wernick has developed educational materials for Medicare partners and stakeholders on Medicare Parts A, B, and C in various formats such as printed materials, seminars, and teleconferences. His experience also includes serving as an Adjunct

Instructor for City University and Kaplan University from 2011 through 2013. Mr. Wernick also volunteered as an Advocate at the Medicare Rights Center in New York City.

Prior to joining CMS, Mr. Wernick worked as a Financial Analyst at Columbia University and as a Finance Manager at Johns Hopkins University. In these roles, he was responsible for training U.S. and foreign colleagues on procurement and Federal donor and university requirements.

Mr. Wernick earned an executive Master of Public Health degree in Health Policy and Management from the Mailman School of Public Health at Columbia University.

## ***Continuing Education Credit Information***

### ***Continuing Education Credit***

The Centers for Medicare & Medicaid Services (CMS) is evaluating this activity for continuing education (CE) credit. The number of credits awarded will be calculated following the activity based on the actual learning time. Final CE information on the amount of credit will be available on the CMS National Training Program page on the CMS website.

### ***Accreditation Statements***

[Please click here for accreditation statements.](#)

## ***Instructions for Continuing Education Credit***

### ***Finding the Post-Assessment***

Please follow the National Training Program's (NTP's) instructions for accessing the post-assessment in the LMS and receiving your continuing education certificate.

### ***Hardware/Software Requirements***

[Please click here for hardware and software requirements.](#)

### ***CMSCE Program Policies***

[Please click here for CMSCE Program Policies.](#)

### ***CMS Privacy Policy***

[Please click here for CMS' Privacy Policy.](#)

### ***Help***

For questions regarding the content of this activity or for technical assistance send an e-mail to the CMS National Training Program (NTP) at [Training@cms.hhs.gov](mailto:Training@cms.hhs.gov).