01-21-2020 Module 1 Understanding Medicare [CEU] Course 1 of 2
(CMS National Training Program)

Continuing Education (CE) Activity Information & Instructions

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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), including 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 Objectives
By the end of this presentation, participants should be able to:
- Identify enrollment and eligibility requirements for 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 (alphabetical by last name)
The planners/developers of this activity have signed a disclosure statement indicating any relevant financial interests. This activity was developed without commercial support.

Kenneth Gardner, MS, developer/planner/presenter, has nearly 30 years of health and managed care experience in both public and private sectors. Mr. Gardner is currently serving as a Program Training Specialist for the Centers for Medicare & Medicaid Services (CMS) Division of Training, and previously spent eight years with CMS as a Health Plan Manager and Outreach Specialist. He has years of operational experience with Medicare Advantage (MA), Prescription Drug Plans (PDPs), and marketplace health plans. He has particular expertise with Medicare Parts C and D and the federal marketplace platform. Mr. Gardner has developed and conducted training on many aspects of Medicare, Medicaid, and marketplace programs. He has led projects that delved into issues as diverse as self-administered drugs in the hospital outpatient setting to health coverage options for migrants from the Marshall Islands and Palau.

Mr. Gardner has developed training and spoken to hundreds of audiences ranging from small community groups to professional organizations on the local, state, and national level. He served as a spokesman for the U.S. Department of Justice (DOJ), developing and providing training for federal agencies, congressional staff, and consular staff from many foreign countries. Prior to joining CMS, Mr. Gardner worked in various capacities in the private sector, including...
serving as an Administrator for the Department of Medicine at the University of California, San Francisco, and Director of Administration for the Medical Group at the University of California, San Francisco (UCSF). Mr. Gardner serves as an Adjunct Professor at the Thomas J. Long School of Pharmacy at the University of the Pacific, where he has lectured on Medicare and Marketplace programs. He also serves as a preceptor for pharmacy students doing rotations at CMS to better understand Medicare’s health and drug programs from a public policy perspective.

Mr. Gardner earned a Master of Science degree in Systems Management from the University of Southern California.

Mr. Gardner has disclosed that he is a Licensed Insurance Agent for Medigap & Prescription Drug Plan (PDP) services with United Healthcare, Aetna, and Transamerica.

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.

Ms. Lare has nothing to disclose.

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, 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.

Ms. Long has nothing to disclose.

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
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.

Ms. Moreno has nothing to disclose.

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.

Mr. Santana has nothing to disclose.

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.

Ms. Watson has nothing to disclose.

**Continuing Education Credit Information**

**Continuing Education Credit**

International Association for Continuing Education and Training (IACET)
The Centers for Medicare & Medicaid Services (CMS) is authorized by IACET to offer 0.2 Continuing Education Unit (CEU) for this activity. CEU will be awarded to participants who meet all criteria for successful completion of this educational activity. CEU credit for this course expires at midnight on **February 29, 2020**.

**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.