

**Medicare
Secondary
Payer
Compliance**



Medicare Secondary Payer 2023: Maximizing Its Potential for Your Clients

Program dates start March 23. Register today!

**7.5 CLE
1 EPR**

Medicare Secondary Payer 2023: Maximizing Its Potential for Your Clients

Make the most of Medicare

Medicare Secondary Payer (MSP) compliance is notoriously confusing, but it's a must for personal injury and worker's compensation attorneys. Recently, the Centers for Medicare and Medicaid Services (CMS) made several announcements with new settlement implications. Understanding this ever-changing landscape is key to minimizing your financial risk and to maximizing client recoveries.

At **Medicare Secondary Payer: Maximizing Its Potential for Your Clients**, you'll receive sound recommendations from a panel of stakeholders and veteran practitioners on compliance issues, settlement best practices, and troubleshooting Medicare Set-Asides. Take an inside look at how insurers interact with CMS and discover how beneficiaries are impacted beyond future medical care.

There will be an answer

Have a niche or particularly challenging question? Join us on March 23 and get answers during a Q&A session with our panel.

How you'll benefit:

- Provide better guidance to your clients on Medicare Secondary Payer issues
- Get practical advice on how to conquer common compliance issues
- Maximize your clients' interests, while minimizing your risk
- Avoid ethical perils in your personal injury or worker's compensation practice

Who should attend:

- Worker's compensation attorneys
- Personal injury lawyers
- Support staff for worker's compensation and personal injury lawyers
- Elder law attorneys
- Insurance claims professionals
- General practitioners

Register now!

Dates / Location

In-Person Seminar

Thursday, March 23, 2023
State Bar Center
5302 Eastpark Blvd.
Madison, WI
(608) 257-3838

Live Webcast

Thursday, March 23, 2023

Webcast Replays

Wednesday, March 29, 2023
Friday, April 7, 2023
Tuesday, April 11, 2023
Monday, April 17, 2023
Thursday, April 27, 2023
Friday, May 5, 2023
Tuesday, May 23, 2023
Monday, June 12, 2023

Credits

This program will be submitted to the Wisconsin Board of Bar Examiners for **7.5 CLE credits including 1 Ethics and Professional Responsibility credit.**

Registration

ONLINE: wisbar.org/seminars

PHONE: (800) 728-7788

FAX: (608) 257-5502

MAIL: State Bar PINNACLE Registrations
P.O. Box 7158
Madison, WI 53707-7158

State Bar CLE/PINNACLE Passbook Registrations: Passbook certificates must be received by the State Bar at least one business day prior to the event. For in-person seminars, walk-in registrations using Passbook Certificates are also welcome.

Registration Cancellations: Please visit wisbar.org/cancellations for information on PINNACLE registration cancellation policies.

Course Materials for Attendees: Course materials are provided in PDF format and are downloadable from *myStateBar* on wisbar.org up to two days prior to and 90 days after your seminar.

COVID-19 Safety Information: Complete and current safety guidelines can be found at wisbar.org/covidsafety.

Schedule

8:00 AM Registration

8:30 AM Welcome and Introductions

8:40 AM Medicare Secondary Payer Act: Understanding Its Impact on Work Comp Cases

- Cut through the confusion surrounding the Medicare Secondary Payer Act
- Understand what you need to know to provide better guidance to your clients and resolve cases

Aaron P. Frederickson, Chelsie D. Springstead

9:40 AM Defense and Applicant Perspective

Aaron N. Halstead, Chelsie D. Springstead

10:40 AM Break

10:55 AM Stakeholder Perspective: What Do You Hate About Medicare?

- Stakeholder perspective on Medicare Secondary Payer in worker's compensation and personal injury cases
- How applicant and defense attorneys can work with claims adjustors to get claims resolved
- Barriers in the claim process and how to navigate Medicare

Ashley Becerra, Shawn Kalderman, Stephanie Kopitzke

11:55 AM Lunch (on your own)

12:55 PM Alex, I Will Take Liability Medicare Set-asides for \$200

- Common problems in Medicare Set-asides for non-worker's compensation cases
- Understanding exposure for plaintiffs and responsible reporting entities
- Identifying when Medicare's future interests may require protection
- Identifying when it is appropriate to create a Liability Medicare Set-aside (LMSA)
- Counseling clients when navigating issues concerning LMSAs

Aaron P. Frederickson, Kristen S. Scheuerman

1:55 PM Break

2:10 PM Medicare Secondary Payer Compliance and Your Clients

- Insight into the MSP process
- How the insurers interact with CMS
- How settlement information is shared beyond the MSA
- The importance of basic Medicare knowledge
- How the beneficiary is impacted beyond simple future medical care consideration

Amber Worman

3:25 PM Ethics and Medicare Secondary Payer

- Common challenges faced by worker's compensation attorneys
- How to ethically implement change in your legal and compliance programs
- Understand how the Rules of Professional Conduct apply in Medicare Secondary Payer cases
- Find out why complying with CMS regulations should give every attorney pause
- Get strategies for handling ethical issues that arise in representing clients on Medicare and Medicaid

Aaron P. Frederickson

4:25 PM Ask the (Medicare Secondary Payer) Experts

Aaron P. Frederickson, Aaron N. Halstead, Kristen S. Scheuerman, Chelsie D. Springstead, Amber Worman

4:30 PM Program Concludes

Following start time, schedule will vary slightly from above listed times.

Faculty

Program Chair & Presenter

Aaron P. Frederickson

MSP Compliance Solutions, LLC, Minneapolis

Presenters

Ashley Becerra

West Bend Mutual Insurance, Madison

Kristen S. Scheuerman

Weiss Law Office, S.C., Appleton

Aaron N. Halstead

Hawks Quindel, S.C., Madison

Chelsie D. Springstead

Lindner & Marsack, S.C., Milwaukee

Shawn Kelderman

Society Insurance, Des Moines

Amber Worman

AK Worman & Associates, Helena, MT

Stephanie Kopitzke

West Bend Mutual Insurance, Madison

Book Bonus!

Worker's Compensation Handbook

Seminar attendees will enjoy a **free two-week trial** of the *Worker's Compensation Handbook* Books UnBound® title and an invitation to **save 20%** on either a one-year subscription to the Books UnBound title or purchase of the print book.* When a workplace injury or illness strikes, you'll have thorough explanations of worker's comp law and practice, plus insightful analysis of common situations.



*Attendees will receive information to access the free trial and discount via email after attending the program. Discount applies to both print and digital Books UnBound editions of this title and cannot be applied to previous purchases. Offer valid as long as CLE credit is available for this program. For Books UnBound users, discount may be applied to purchase of individual Books UnBound title only and may not be used on purchase of full library.

Additional Learning Opportunities

46th Annual Worker's Compensation Update – 2022

Stay current on a wide range of topics and updates in the field of worker's compensation, from Medicaid to medical causation, bankruptcy to independent contractors, and more. You'll also hear first-hand from an independent medical examiner and vocational experts who assess worker injuries. **7 CLE**

CLE OnDemand™ Seminar: #CA3316D; Member: \$269 | Nonmember: \$349

The Law of Damages in Wisconsin

Relied on by thousands of attorneys and judges, this trusted reference is chock full of insightful analysis and practical wisdom. Inside, you'll find guidance on the types of damages available and the special rules governing them so you can protect your clients' interests and make sound decisions. (Includes 2020-21 and 2021-22 supplements)

Print Book: #AK0063; 1,634+ pp.; 8th ed. 2019-20; 3 vol.; Member: \$275 | Nonmember: \$343.75

Books UnBound Subscription: #AE0063_SUB; Member: \$270 | Nonmember: \$337

Civil Litigation Forms Library

Taking command of the litigation process with access to fillable, customizable forms that can be easily adapted to fit your needs. In this library, you'll find more than 200 forms including affidavits, complaints, interrogatories, motions, notices, summonses, and more!

Online Subscription: #FSFB3000; Members Only: \$149/year
(Discounts available on multi-user subscriptions.)

Medicare Secondary Payer 2023

Priority Code: S 4 1 9 2 B

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<input type="checkbox"/> State Bar Member	<input type="checkbox"/> \$239	<input type="checkbox"/> \$269
<input type="checkbox"/> Nonmember	<input type="checkbox"/> \$319	<input type="checkbox"/> \$349
<input type="checkbox"/> Ultimate Pass Gold/Silver	<input type="checkbox"/> \$0	<input type="checkbox"/> \$0
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Nonlawyer Profession _____

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Firm Name _____

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Phone Number _____

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