



IRIS A. BERMUDEZ-LUGO

Director, CMS-Puerto Rico/Virgin Islands Field Office (PR/VI FO)

Iris Bermudez-Lugo serves as the Director of the Centers for Medicare & Medicaid Services (CMS) Puerto Rico/Virgin Islands Field Office for RO2, providing a local presence, local leadership, and maintaining a dialogue with key stakeholders and her CMS colleagues throughout the year in coordination with all Medicare/Medicaid business lines. Ms. Bermudez began to work with the CMS New York Regional Office in 2002; was promoted to the CMS Atlanta Regional Office and subsequently promoted back to the CMS-NYRO in 2009. She worked for the government of the US Virgin Islands for twenty seven years prior to her arrival at CMS. Ms. Bermudez is a social worker/educator by training and experiences. She earned a Master's degree in Education at the University of Miami, Coral Gables, Florida and holds a Bachelor's degree in Social Work from Temple University in Philadelphia, Pennsylvania.

COLLEEN CARPENTER

Manager, Health Plans Branch, Division of Medicare Health Plans Operations

Colleen began her career with CMS in 1991 as a Medicare policy specialist. She worked on a variety of projects to refine or clarify CMS' regulations and policies, including, portable x-ray, independent diagnostic testing facilities, ambulance, laboratory and Medicare coverage during catastrophic events (hurricanes, flooding etc.). In 2006 Colleen began working with the Medicare Part D drug benefit and led the region's efforts to ensure beneficiary access to prescription drugs. She is currently the manager of the Health Plans Branch with oversight of eleven Medicare Advantage and eight PACE plans in the region.

SANDRA COLON FERRER

SMP Outreach Consultant

Sandra Colon Ferrer has been on loan/detail to the Florida SMP program where she serves as an SMP Outreach Consultant since Mid 2009 from the Miami Field Office, Centers for Program Integrity, Centers for Medicare & Medicaid Services (CMS). She transferred from the CMS New York Regional Office to the Miami Field Office in 2002. As the SMP Outreach Consultant, she frequently appears on radio and television call-in shows, answering questions for English and Spanish speaking audiences. Conducts education programs and is a volunteer recruiter and trainer. Develops and fosters relationships with a huge network of social and advocacy groups, stakeholders and entities throughout South Florida. She has over 32 years experience as a civil servant in the federal government. Prior to CMS she worked for the Social Security Administration in many capacities. Prior to her civil servant career, she was a Child Protective caseworker for Monroe County in Rochester, NY. Sandra Colon Ferrer has a degree in Social Work from Nazareth College of Rochester.

ROBERT FOSTER

Special Assistant to the Regional Administrator, CMS Atlanta

Robert Foster is the Special Assistant to the Regional Administrator for CMS in Atlanta. Mr. Foster began his federal career in 1973 with Social Security in South Florida. After 4 years there, he transferred to the Atlanta regional office to investigate Medicare fraud cases. In the intervening years, he has spent 6 years as an OIG Special Agent in addition to assignments in CMS's policy, budget, anti-fraud and external affairs, before moving to his current position in 2010. He holds a B.A. and M.Ed. from the University of Virginia and a J.D. from Georgia State University. He is admitted to the bar in Georgia and is a member of the Bar's Health Law Section. He is married, with 3 children and three grandchildren. He teaches adult Sunday school in his church and, in his spare time, officiates high school lacrosse.



CRYSTAL FRANCIS

Health Insurance Specialist in the Division of Medicaid and Children's Health Operations

Crystal Francis is a Health Insurance Specialist in the Division of Medicaid and Children's Health Operations, at the Atlanta Regional Office of the Centers for Medicare and Medicaid Services (CMS). Ms. Francis is the Native American Contact for the Atlanta Region, where she serves as a liaison between CMS and Federally Recognized American Indian Tribes. Ms. Francis also serves as the Children's Health Insurance Program (CHIP) Lead for the Atlanta Region, where she is a Project Officer for two CHIPRA Cycle II Outreach and Enrollment Grants. In addition, Ms. Francis participates in community outreach events, regulation reviews, State plan amendment processing, and grantee program oversight. Ms. Francis previously worked for the Division of Children's Health Insurance Programs, at the CMS Central Office in Baltimore, Maryland. Prior to her Federal service with CMS, Ms. Francis worked in the areas of educational outreach, community relations, and juvenile delinquency prevention, at the State and local levels.

ANTON J. GUNN, M.S.W.

Regional Director of IV Office of DOH/HHS

Anton J. Gunn, M.S.W. is the Regional Director (RD) at the Region IV Office of the U.S. Department of Health and Human Services (HHS). Mr. Gunn was appointed by HHS Secretary Kathleen Sebelius on August 13, 2010. Region IV is HHS's largest region in population and domestic geography and is composed of Alabama, Florida, Georgia, Kentucky, Mississippi, North Carolina, South Carolina, and Tennessee. HHS is the federal government's lead agency for protecting the health of all Americans and providing essential human services, especially for those who are least able to help themselves. The Department has over 300 programs covering a wide spectrum of activities including public health, health care, financing, family support, social services, emergency preparedness and food and drug safety. As Regional Director, Mr. Gunn is the eyes, ears, and voice for Secretary Sebelius in Region IV. Mr. Gunn represents the Secretary in direct official dealings with federal, state, local and tribal government organizations, and other external partners in the Region.

HUGO HUAPAYA

Health Insurance Specialist, CMS

Hugo Huapaya is a health insurance specialist with the Centers for Medicare & Medicaid Services (CMS). The CMS is the Federal agency that runs the Medicare and Medicaid programs. Mr. Huapaya has been in the health care industry for over twenty years: first as a clinical laboratory supervisor and later as an outreach presenter for Medicare. As a CMS representative, he has monitored, managed and audited the operations of multiple Medicare Advantage plans. In his current assignment, Mr. Huapaya is a spokesperson for Medicare. He provides presentations for the general public, stakeholders, advocates and Medicare beneficiaries regarding the policy, benefits and resources available for all. His presentations are conducted in English or Spanish with in-person presentations or via the broadcast media.

MEEKA JACKSON

Account Manager, Center for Consumer Information & Insurance Oversight, CMS

Ms. Meeka Jackson is an account manager in the Center for Consumer Information & Insurance Oversight/Office of Insurance Programs, within the Centers for Medicare & Medicaid Services. In this capacity, Ms. Jackson provides technical assistance and oversight of state-administered Pre-Existing Condition Insurance Plan (PCIP) programs. The PCIP program, created under the Affordable Care Act, provides health insurance for people unable to secure coverage because of a pre-existing health condition. Ms. Jackson also assists in the national promotion of the PCIP program, using stakeholders and partners to reach potentially eligible populations.



DR. TERESA D. KRIES

Centers for Medicare & Medicaid Services (CMS) Branch Manager, Medicare Advantage Branch Division of Medicare Health Plans Operations Atlanta Regional Office

Teresa Kries joined CMS in January 2003 as the Medicare Advantage Branch Manager. Prior to joining the federal work force in Atlanta, Teresa worked for six years with Kaiser Permanente as the Medicare Contract Compliance Manager. In addition, Teresa worked in the mental health and substance abuse arena in Miami, FL for approximately ten years before moving to Atlanta. Teresa also worked for the Department of Defense in Germany and Greece for ten years prior to moving to Miami. Teresa has a Doctorate in Health Administration, M.S. degree in business Management, and a B.S. degree in Biology.

MARIAN LOVE

Manager, Provider Enrollment, First Coast Service Options, Inc.

Marian Love has ten years of experience in Medicare operations, providing support and oversight throughout various roles including capacity as a Provider Enrollment Auditor, Operations Analyst, Supervisor and Manager. Marian has been the Provider Enrollment Manager since 2009.

GLORIA M. MALDONADO

Special Assistant and Budget/Travel Coordinator, Office of the Assoc. Reg. Admin.

Gloria M. Maldonado is the Special Assistant and budget/travel coordinator for the office of the Associate Regional Administrator, Division of Medicare Health Plans Operations, Centers for Medicare & Medicaid Services (CMS) in Atlanta. With more than 27 years of federal service, Maldonado was a military spouse for 23 years and lived abroad for 14 years on military installations located in Turkey, Iceland, Italy and Great Britain. She has been employed by the U.S. Air Force, U.S. Army, U.S. Navy Reserve, and joined CMS, formerly known as the Health Care Financing Administration, in October 1998.

MARILYN D. MAULTSBY

Director of the Division of SHIP Relations, Office of External Affairs and Beneficiary Services

Marilyn D. Maultsby is Director of the Division of SHIP Relations, in the Office of External Affairs and Beneficiary Services, at the Centers for Medicare & Medicaid Services, in Baltimore, Maryland. She has held this position since 2006. The Division of SHIP Relations provides management and oversight of CMS funded grants to State Health Insurance Assistance Programs (SHIPs) in the 50 states, the District of Columbia, Puerto Rico, Guam and the Virgin Islands. The Division also provides information, training and technical support to these programs. As Director of the Division of SHIP Relations, Ms. Maultsby has played a key role in the development and implementation of a performance measurement system for the SHIP network, the provision of SHIPs' access to a designated 1-800-MEDICARE number, the implementation of enhancements to the SHIP National Performance Reporting System, and in training new SHIP Directors.

GLORIA MCDONALD, LBSW, MA

Program Director for SHIP

Gloria McDonald has been the Program Director for the State Health Insurance Program (SHIP) at the Lt. Governor's Office on Aging for the last 15 years. She is responsible for coordination of four SHIP staff members at the state Office on Aging and 25 staff members at the ten Aging Network offices throughout the state. Her SHIP duties include ensuring that SHIP counselors are trained to assist Medicare beneficiaries with enrollment and or reviewing their health care coverages. Gloria also manages the Medicare Improvements for Patients and Providers Grant (MIPPA), Senior Medicare Patrol (fraud project) and the Information & Referral Programs. Mrs. McDonald holds a Master's degree in Business Management and a Bachelor's degree in Social Work. Her previous work experience includes 17 years with the South Carolina Department of Social Services in the Medicaid and Adult Protective Services Programs.



TERESA NINO

Director, Office of Public Engagement, CMS

Teresa Niño joined the Centers for Medicare and Medicaid Services (CMS) within the U.S. Department of Health and Human Services (HHS) in May of 2009 when she was appointed by the Obama Administration to be the Director of the Office of External Affairs and Beneficiary Services (OEABS). In that capacity, she guided 280 employees and managed a \$550M budget to successfully achieve the strategic communication objectives that promote the vital health care for more than 90 million Medicare and Medicaid beneficiaries. In April of 2011, Ms. Niño was selected to lead the newly created Office of Public Engagement within CMS. In this current role, she oversees the Medicare Ombudsman's Group, Tribal Affairs, Emergency Preparedness and Response, and the Partner Relations Group. The function of the office, as the name implies, is to engage the American public in CMS programs and services such as Medicare, Medicaid, the Children's Health Insurance Program, the Affordable Care Act, Medicaid Expansion, and the Pre-Existing Conditions Insurance Program. Ms. Niño has over 20 years' experience in the field of Communications and began her career in journalism in 1986 in Chicago as a TV Reporter. She was soon tapped, in 1989, to assist the local mayoral campaign that resulted in the election of Chicago Mayor Richard M. Daley. Ms. Niño served as Mayor Daley's Assistant Press Secretary for the City of Chicago and was also Deputy Campaign Manager for the Mayor's re-election campaign.

KATHRYN PADGETT

Manager, Palmetto GBA

Kathryn Padgett has over ten years of experience in Medicare training and has served as Provider Outreach and Education Manager of Palmetto GBA's CMS Train the Trainer contract for the last four years. She is responsible for producing a variety training materials for the Medicare Learning Network® (MLN) including web-based training (WBT), fact sheets, booklets, and presentations, while incorporating IACET, ACCME and Section 508 requirements. Ms. Padgett has over 15 years experience in the health insurance industry, including overseeing training delivery activities for multiple entities simultaneously. She has worked with both Medicare contractor staff and national provider audiences to develop and deliver training to large groups of attendees. Ms. Padgett earned a Bachelor's degree in Education at the University of South Carolina.

GLORIA PARKER

Associate Regional Administrator for the Division of Medicare Health Plans Operations

Gloria Parker is the Associate Regional Administrator for the Division of Medicare Health Plans Operations for the Centers for Medicare & Medicaid Services (CMS) in Atlanta, Georgia. As such, she is responsible for the oversight of Medicare Advantage Organizations and Medicare Prescription Drug Plans (PDP). Ms. Parker has over 30 years of experience in management and administration of major government programs and operations. Prior to CMS, Ms. Parker served as the Technical Advisor for the Pension Benefit Guarantee Corporation and held various managerial positions with the Social Security Administration (SSA). Ms. Parker has a Bachelor Degree from the Florida Atlantic University and is a graduate of the Council for Excellence in Government. Throughout her career, Ms. Parker has been the recipient of several awards to include the United States Department of Health and Human Services Secretary's Award for Distinguished Services.

MICHAEL PIERSON

Health Insurance Specialist

Michael began his government career with Social Security in 1981 and in 1989 to present; Michael has worked for The Centers for Medicare and Medicaid Services, formerly known as the Health Care Financing Administration. At CMS, Michael has worked in the areas of Managed Care, Fee for Service Policy, Beneficiary Services and Medicare Secondary Payer. Currently Michael is in the Division of Financial Management and Fee for Service Operations having dual roles as the Atlanta Regional HITECH lead as well as the Medicare Fee for Service Point of Contact. His primary focus is in the promotion of Health Information Technology under the HITECH legislation throughout the Atlanta Region which is comprised of eight states.



KEVIN ROBERTSON

Deputy Commissioner, SHIIP

Kevin Robertson is the Deputy Commissioner for the North Carolina Seniors' Health Insurance Information Program, better known as SHIIP. Kevin has been the Deputy Commissioner since November 2010. Prior to this position he was the Statewide Volunteer Manager for NC SHIIP. He held that position for seven years. Kevin has over 16 years of volunteer management experience. He is also a past President for the North Carolina Association of Volunteer Administrators (NCAVA) and served on the board in various positions. Before coming to NC SHIIP he worked with the Retired & Senior Volunteer Program at Northwest Piedmont Council of Governments in Winston-Salem, NC. Kevin has been certified through NCAVA in Volunteer Management and he holds a Masters Degree in Public Administration from High Point University.

DAVID SANTANA

Lead Trainer, Office of Public Engagement, Division of National Medicare

David Santana is a Health Insurance Specialist in the Centers for Medicare & Medicaid Services (CMS). David works in the Office of Public Engagement in the Division of National Medicare Training Program and is the lead trainer. He is responsible for effectively communicating information about CMS programs and resources available to beneficiaries, caregivers and advocacy groups. David's responsibilities also include the following: conducting Medicare training and education throughout the nation; playing a key role in the development of materials used for the national Medicare training program for CMS contractors and partners; and providing technical assistance to federal, state, and local agencies and organizations about the Medicare program.

LOIS SERIO

Deputy Director, Medicare Ombudsman Group, Office of Public Engagement, CMS

Lois Serio has worked in CMS for over twenty years. She started in the Office of Financial Management working on the formulation and execution of the Agency's program and administrative budgets. She decided to "switch gears" and moved into the beneficiary outreach arena collaborating with the Regional Offices in the development of "REACH – Regional Education about Choices in Health" CMS' first National Medicare Education Campaign implemented at the local level. She then went on to work with the Regions and Central Office in various capacities combining her financial management background with her external affairs expertise. Currently Lois serves as the Deputy Director for the Medicare Ombudsman Group within CMS. Lois' work involves assisting beneficiaries with inquiries, complaints, and grievances and the analysis of systemic issues that impact people with Medicare in order to identify and make recommendations on Medicare program improvements. She is also heavily involved with the ongoing operations of the Durable Medical Equipment, Prosthetics, Orthotics, and Supplies (DMEPOS) Competitive Acquisition Ombudsman Program. Lois provides guidance and works closely with the Competitive Acquisition Ombudsman to reach out to suppliers and beneficiaries in order to understand and facilitate program improvements. Lois Serio and her staff work continually to help the Agency achieve more effective customer service to more than 47 million Medicare beneficiaries.

JENNIFER SHAPIRO, MPH

Director, Division of Benefit Purchasing and Monitoring

Ms. Jennifer Shapiro is the Director of the Division of Benefit Purchasing and Monitoring in the Medicare Drug Benefit and C & D Data Group at the Centers for Medicare and Medicaid Services (CMS). Currently Ms. Shapiro manages the CMS division charged with monitoring Part D program performance, particularly with regard to the activities of the prescription drug plans participating in the Medicare Drug Benefit program. This monitoring work includes implementing numerous large-scale studies of drug plan sponsor performance, analyzing administrative and operational CMS data to assess (next page)



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performance, and issuing compliance notices and taking other compliance action as necessary. The division is also responsible for the annual application and contracting process for new and expanding drug benefit contractors. Ms. Shapiro and her team annually prepare regulation sections on an array of legal, compliance, contracting, and application-related topics. Staff also provides support for CMS enforcement actions by attending audits, making enforcement referrals, developing depositions for law suits, and providing supporting compliance-related information. Previously Ms. Shapiro managed the CMS division charged with running the Medicare Drug Discount Card Program. Ms. Shapiro has held senior-level management positions in the private sector, as well. Prior to joining CMS, she was a Senior Manager with The Lewin Group, a health policy research and management consulting firm. Ms. Shapiro received her Master of Public Health degree at Johns Hopkins University, where she focused on public policy, quantitative analysis, and evaluation methods.

CARMEN SOTO-ORTIZ

Medicare Contractor, Palmetto GBA

Carmen Soto-Ortiz has a Bachelor of Arts degree in Psychology from Brooklyn College in New York City. Carmen has 20 years of experience in the health insurance field. For the past eight years, she has been working with Palmetto GBA, a Medicare contractor. The first four years, she was an ombudsman for the Region C Durable Medical Equipment Regional Contract (DMERC) providing education, problem resolution, and on-site training to suppliers of durable medical equipment. Carmen works now for the Durable Medical Equipment, Prosthetics, Orthotics, and Supplies (DMEPOS) Competitive Bidding Implementation Contract (CBIC). She has been working with CBIC since the inception of the DMEPOS Competitive Bidding Program. She is the ombudsman for the competitive bidding area of Orlando-Kissimmee in Florida. As a CBIC ombudsman, her main goal is to develop relationships with other organizations and agencies that may be impacted by the competitive bidding program. Part of Carmen's responsibilities is to provide information to the stakeholders on the program legislative and policy issues and ensure all stakeholders are made aware of program changes and trends.

JEAN STONE

Director, Northeastern Program integrity Field Office, CMS

Jean serves as the Lead Medicare 7-State DME Stop Gap Plan which revoked 479 suppliers' privileges, denied more than \$36 million in claims, identified more than \$69 million in overpayments, opened 1,240 new investigations and referred 28 cases to law enforcement for more than \$51.9 million in Medicare billing since October 2008. Jean has over 40 years experience at the United States Department of Health and Human Services. She has served as the CMS HEAT Liaison to Health Care Prevention & Enforcement Anti-Fraud Enforcement Action Team for Brooklyn, NY Strike Force. Jean is a graduate of Immaculata College.

MICHELLE TURANO

Deputy Director, Program Compliance and Oversight Group

Michelle Turano serves as the Deputy Director of the Program Compliance and Oversight Group (PCOG), which is devoted to developing and implementing an effective, comprehensive compliance and audit program for Medicare Advantage and Part D sponsors. The group is also the enforcement arm of the Medicare Advantage and Part D program, responsible for intermediate sanctions, civil money penalties, and contract terminations. Ms. Turano has been with CMS since 2002, and her previous work involved evaluating Medicare Advantage and Part D sponsor performance (relative to CMS' clinical and administrative program requirements). She holds an undergraduate degree from the University of Missouri and graduate degrees in social service administration and health policy from the University of Chicago.



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NICCI WARNER

Director, MAC J9 Provider Enrollment

Nicci Warner has 26 years of experience in Medicare operations, providing leadership, strategic planning, and day-to-day operational expertise, across roles as Provider Enrollment Director, Appeals Director, Appeals Manager, Systems Analyst, Claims/Correspondence/Appeals Supervisor and Hearing Officer. She has served as the Director over the Provider Enrollment Department since 2006.

CHARLOTTE WHITING

Health Insurance Specialist, CRB, Div. of Medicare Health Plans Operations

Charlotte Whiting is Health Insurance Specialist for the Customer Relations Branch (CRB), Division of Medicare Health Plans Operations, in the Centers for Medicare and Medicaid Services (CMS), Atlanta Regional Office. She has served as the lead for the Regional Office National Medicare Training Program and as a trainer for many years. Prior to her work with the Centers for Medicare and Medicaid Services, she worked for the Georgia Quality Improvement Organization for 12 years. Her work with the QIO was focused on Medicare Beneficiary Education, partnership development and Diabetes Education. In addition to her Medicare career, Mrs. Whiting stays very busy raising her fifteen year old triplet daughters.

BARBARA WHITTAKER

Director, Palmetto GBA

Barbara Whittaker has served, for the past nine years, as the Project Director of Palmetto GBA's CMS Train the Trainer contract, which produces provider education materials for the CMS Medicare Learning Network® (MLN). Ms. Whittaker commenced employment at Palmetto GBA in 1999 responsible for congressional casework staff and for personally meeting with U.S. Senators and Representatives and for educating their staff in their home states and on Capitol Hill. Ms. Whittaker has over 30 years of management experience in American health care including six years in management of CMS' Peer Review Organizations. She earned a Masters in Health Services Administration from the University of Michigan.

TERESA ZAYAS, M.S.

Health Insurance Specialist

Teresa Zayas has a Masters Degree in Community Counseling and a Bachelors Degree in Psychology from Georgia State University. She has worked with the community since 1986 as a bilingual health professional focusing on partnership development, outreach initiatives and health related programs implementation. Zayas has been providing information to people with Medicare since 2005 when Zayas began working at the Atlanta Regional Office of the Centers for Medicare & Medicaid Services. Zayas is the media contact for Spanish speaking people in Alabama, Florida, Georgia, Kentucky, Mississippi, North Carolina, South Carolina and Tennessee. She is the State Health Insurance Assistance Program (SHIP) Liaison and the lead for the Part C-D Open Enrollment, the Durable Medical Equipment Competitive Bidding, Medicare Preventive Services, Flu Campaign and the Children Health Insurance campaigns for the agency in Region IV. She has been awarded the Administration's Achievement Award for Campaign within the Campaign Team by CMS in 2006, the Employee of the Year for Outstanding Achievement in Diversity Award by the Metropolitan Atlanta Federal Executive Board (FEB) in 2007 and Outstanding Team Award by the February in 2008.