INSTRUCTIONS FOR FACILITATORS

Enclosed you will find everything you need to prepare for and present a Medicare Resident, Practicing Physician, and Other Health Care Professional Training Program course. This package consists of the following materials:

Medicare Physician Guide: A Resource for Residents, Practicing Physicians, and Other Health Care Professionals

Comprehensive guide, available in both print and CD-ROM formats, offers an overview of the Medicare Program.

Video – Medicare Resident, Practicing Physician, and Other Health Care Professional Training: An Introduction

Short video, available in both VHS and DVD formats, provides an overview of the Medicare Resident, Practicing Physician, and Other Health Care Professional Training Program.

Facilitator's Guide

Guide for facilitators, available in both print and CD-ROM formats, consists of the following:

- **Promotional Flyer**
- **Program Sign-in Sheet**
- **PowerPoint Training Modules**
- **Pre- and Post-Assessments**
- **Master Answer Keys**
- **Training Materials Evaluation** (to be completed by facilitators)
- **Course Evaluation** (to be completed by learners)
- **Reference Information**
- **Request for Centers for Medicare & Medicaid Services-Led In-Person Course**

Course Administration

The Medicare Resident, Practicing Physician, and Other Health Care Professional Training Program is a comprehensive, customized instructor-led course that offers an overview of the Medicare Program and information about the many resources that are available to providers.

Audience
The program is open to all health care professionals. The primary target audience is finishing residents who are preparing to establish their own medical practice within six months from attendance at a training session.

Software Requirements
Course documents were developed with the following software:
- Adobe Acrobat 7.0
- Microsoft PowerPoint 2003
- Microsoft Word 2003

You must have one of the following software versions to download and customize the course:
- Adobe Acrobat 7.0
- Microsoft PowerPoint 2000 or above
- Microsoft Word 2000 or above

Pre- Assessment
Prior to presenting each training module, ask learners to complete the Pre-Assessment, Word file(s) labeled "07 Chapter 1 Pre Post Assessment" – "13 Chapter 7 Pre Post Assessment" if you are presenting one or more of the 3-Hour Medicare Program training modules or Word file labeled "14 Introduction to Medicare Pre Post Assessment" if you are presenting the 1.5-Hour Introduction to Medicare training module. The purpose of the Pre-Assessment is to determine learners' knowledge of Medicare prior to attending the course.

Please make copies of completed Pre-Assessment answer sheets for your locked, confidential file and mail originals to:
    Ann Palmer
    Centers for Medicare & Medicaid Services
    7500 Security Boulevard, Mail Stop C4-13-07
    Baltimore, MD 21244

Learning Objectives
Learning objectives describe the intended result of instruction for each training module and assist facilitators in determining which training modules should be included in the course. The training modules are based on information found in the *Medicare Physician Guide: A Resource for Residents, Practicing Physicians, and Other Health Care Professionals*.

Three-Hour Medicare Program Training Module

Chapter 1
- Identify Medicare's four parts
- Recognize the four groups of Medicare insured and uninsured beneficiaries
- Identify the organizations that impact the Medicare Program
- Describe recent laws that impact the Medicare Program

Chapter 2
- Identify Part A and Part B providers and suppliers
- Describe the Medicare Program enrollment process
- Identify how providers and suppliers can protect their practice
- Identify how providers and suppliers can promote cultural competency

Chapter 3
- Describe how Medicare providers and suppliers are reimbursed for the items and services they furnish
- Identify when Medicare is the secondary payer
- Recognize physician incentive and bonus payments

Chapter 4
- Determine the services Medicare pays for
- Determine the services that Medicare does not pay for

Chapter 5
- Describe documentation guidelines for teaching physicians, interns, and residents
- Identify the seven components that define the levels of evaluation and management

Chapter 6
- Identify the goal of the Medicare Integrity Program
- Describe the medical review process
- Determine the two types of coverage determinations
- Define Federal health care fraud
- Define program abuse
- Identify the potential legal actions that may be imposed if a provider, supplier, or health care organization has committed fraud and abuse

Chapter 7
- Describe how providers and suppliers can find answers to inquiries
- Identify the reasons overpayments are often paid
- Identify the five levels of the fee-for-service appeals process
- Define a reopening

<u>1.5-Hour Introduction to Medicare Training Module</u>

- Identify Medicare's four parts
- Recognize the four groups of Medicare insured and uninsured beneficiaries
- Identify Part A and Part B providers and suppliers
- Describe the Medicare Program enrollment process
- Describe how Medicare providers and suppliers are reimbursed for the items and services they furnish
- Identify when Medicare is the secondary payer
- Recognize physician incentive and bonus payments
- Determine the services Medicare pays for
- Determine the services that Medicare does not pay for
- Describe documentation guidelines for teaching physicians, interns, and residents
- Identify the seven components that define the levels of evaluation and management
- Identify the goal of the Medicare Integrity Program
- Determine the two types of coverage determinations
- Define Federal health care fraud
- Define program abuse
- Identify the potential legal actions that may be imposed if a provider, supplier, or health care organization has committed health care fraud and program abuse
- Describe how providers and suppliers can find answers to inquiries
- Identify the reasons overpayments are often paid
- Identify the five levels of the fee-for-service appeals process
- Define a reopening

Let's Review Section
A "Let's Review" Section appears at the end of each chapter in the 3-Hour Medicare Program training module and at the end of the 1.5-Hour Introduction to Medicare training module. The purpose of the review questions is to generate discussion among learners and review the information that was covered in the training module. Facilitators should be prepared to respond if a learner answers incorrectly. The correct answer to each review question is provided.

Post-Assessment
After presenting each training module, ask learners to complete the Post-Assessment, Word File(s) labeled "07 Chapter 1 Pre Post Assessment" – "13 Chapter 7 Pre Post Assessment" if you are presenting one or more of the 3-Hour Medicare Program training modules or Word file labeled "14 Introduction to Medicare Pre Post Assessment" if you are presenting the 1.5-Hour Introduction to Medicare training module. The purpose of the Post-Assessment is to determine learners' knowledge of Medicare after attending the course.

Please make copies of completed Post-Assessment answer sheets for your locked, confidential file and mail originals to:

Ann Palmer
Centers for Medicare & Medicaid Services
7500 Security Boulevard, Mail Stop C4-13-07
Baltimore, MD 21244

Evaluations

Learners should be encouraged to complete the Course Evaluation, Word file labeled "17 Course Evaluation," after each course has been presented. This important tool is used to measure how well learners received the Medicare Resident, Practicing Physician, and Other Health Care Professional Training Program. The Centers for Medicare & Medicaid Services (CMS) uses the feedback received to ensure that the training program meets the needs of health care professionals.

After you have presented the Medicare Resident, Practicing Physician, and Other Health Care Professional Training Program course, please complete the Training Materials Evaluation, which is Word file labeled "16 Training Materials Evaluation." Feedback from facilitators is very valuable to us. We will use your input to improve our courses and educational products.

Please make copies of completed Course Evaluations and Training Materials Evaluations for your locked, confidential file and mail originals to:

Ann Palmer
Centers for Medicare & Medicaid Services
7500 Security Boulevard, Mail Stop C4-13-07
Baltimore, MD 21244

Questions

If you have questions about the Medicare Resident, Practicing Physician, and Other Health Care Professional Training Program, please e-mail them to Residenttraining@cms.hhs.gov.

Preparing to Deliver the Course

Checklist

Facilitators should have the following materials available on the day(s) the course will be presented:

- √ PowerPoint Training Modules
- √ *Facilitator's Guide*
- √ *Medicare Resident, Practicing Physician, and Other Health Care Professional Training: An Introduction* Video
- √ Educational Products
    - o Six weeks prior to the scheduled date of course, facilitators should order enough *Medicare Physician Guide: A Resource for Residents, Practicing Physicians, and Other Health Care Professionals* publications and/or CD-ROMs for each learner from the Medicare Learning Network (MLN) Product Ordering Page. To access the Product Ordering Page, visit *http://www.cms.hhs.gov/MLNGenInfo* on the CMS website, scroll down to "Related Links Inside CMS," and select "MLN Product Ordering Page." Other products that can be ordered from the MLN are guides, fact sheets, brochures, job aids, and videos on a variety of topics of interest to Medicare providers and suppliers. All MLN products are available free of charge.
    - o To order the brochure titled *Medicare Payments for Graduate Medical Education: What Every Medical Student, Resident, and Advisor Needs to Know* (available in both print and downloadable formats), visit the Association of American Medical Colleges website located at *http://www.aamc.org/* or call (202) 828-0416.
- √ Pre- and Post-Assessments
- √ Course Evaluations
- √ Reference Information
- √ Sign-In Sheets
- √ Colored Markers and Highlighters
- √ Personal Computer
- √ Projector and Projection Screen
- √ Flipchart Stand and Paper
- √ Pencils and Pens

Errata Sheets

Medicare Physician Guide: A Resource for Residents, Practicing Physicians, and Other Health Care Professionals and *Facilitator's Guide* errata sheets will be posted on a quarterly basis at *www.cms.hhs.gov/MLNProducts/MPUB/list.asp#* on the CMS website. Under "Select From The Following Options," enter Medicare Physician Guide to be taken to the errata sheet link. Errata sheets assist in ensuring that the Medicare Resident, Practicing Physician, and Other Health Care Professional Training Program course contains the most up-to-date Medicare information. Facilitators can also sign up to be notified when errata sheets are posted by subscribing to the Resident Training listserv. To subscribe to the listserv, visit *www.cms.hhs.gov/apps/mailinglists* on the CMS website. Select Medicare Learning Network and RESIDENT_TRAINING-L from the list under "To narrow the list shown below, please select a specific audience or category from the dropdown."

Instructional Strategy

Facilitators may choose from the following course options:

- The 3-Hour Medicare Program course, which consists of seven training modules that are based on information found in the *Medicare Physician Guide: A Resource for Residents, Practicing Physicians, and Other Health Care Professionals*.
- The 1.5-Hour Introduction to Medicare course, which is an abbreviated training module that is based on information found in the *Medicare Physician Guide: A Resource for Residents, Practicing Physicians, and Other Health Care Professionals*.
- A course that is tailored by choosing the training modules that best meet the needs of the learners.

Keys to Icons

The Notes Section of the PowerPoint training modules has the following icons that prompt the facilitator during the course:

ICON	EXPLANATION
	Indicates that the facilitator will read aloud
	Indicates that the facilitator will hand out materials
	Indicates the average time it takes to present the training module
	Indicates an important note for the facilitator
A	Indicates that the facilitator will administer the Pre- or Post-Assessment
?	Indicates that the facilitator is provided with a question to ask the learners

Estimated Delivery Times

Below are the estimated delivery times for each training module. Note that delivery times may vary depending on:

- Pace of the facilitator;
- Course information presented; and
- Number and complexity of learners' questions.

	TITLE	DELIVERY TIME
Chapter 1	Introduction to the Medicare Program	30 minutes
Chapter 2	Becoming a Medicare Provider or Supplier	40 minutes
Chapter 3	Medicare Reimbursement	15 minutes
Chapter 4	Medicare Payment Policies	20 minutes
Chapter 5	Evaluation and Management Documentation	45 minutes
Chapter 6	Protecting the Medicare Trust Fund	20 minutes
Chapter 7	Inquiries, Overpayments, and Appeals	10 minutes
DELIVERY TIME	**Medicare Program Training Module**	**180 minutes (3.0 hours)**
DELIVERY TIME	**Introduction to Medicare Training Module**	**90 minutes (1.5 hours)**
TOTAL DELIVERY TIME	**Medicare Program and Introduction to Medicare Training Modules**	**270 minutes (4.5 Hours)**

Customizing and Printing the Promotional Flyer

- Determine which training modules will be included in the course before customizing and printing the promotional flyer.

- Open the PowerPoint file labeled "03 Promotional Flyer."

- Place the cursor at "Insert Name of Organization" located at the top of the flyer and enter the name of your organization.

- Place the cursor after each bullet under "Objectives of program" and enter the objective(s) of the course.

- Place the cursor after "Date," "Time," "Place," "Local Point of Contact," and "Telephone Number" located at the bottom of the flyer and enter course and contact information.

- Select FILE | PRINT. In the "Copies" section of the Print dialog box, enter the number of flyers you will need and select OK. **Optional**: Print one copy of the flyer and make additional copies using a copy machine.

- Select FILE | SAVE.

- Select FILE | CLOSE.

- Notify learners about the upcoming course by posting promotional flyers.

Customizing and Printing the Sign-in Sheet

- Open the Word file labeled "04 Program Sign-in Sheet."

- Place the cursor at "Insert Name of Organization" located at the top of the sheet and enter the name of your organization.

- Place the cursor at "Insert Date of Course" located at the top of the sheet and enter the date the course will be presented.

- Select FILE | PRINT. In the "Copies" section of the Print dialog box, enter the required number of Sign-in Sheets you will need based on the expected number of learners and select OK. **<u>Optional</u>**: Print one copy of the Sign-in Sheet and make additional copies using a copy machine.

- Select FILE | SAVE.

- Select FILE | CLOSE.

- Please make copies of completed Sign-in Sheets for your locked, confidential file and mail original Sign-in Sheets to:
  Ann Palmer
  Centers for Medicare & Medicaid Services
  7500 Security Boulevard, Mail Stop C4-13-07
  Baltimore, MD 21244

Customizing the PowerPoint Training Modules

- Determine which training module(s) you will present before customizing the PowerPoint training modules.

- Open the appropriate PowerPoint file labeled "05 3 Hour Medicare Program Training Module" or "06 1.5 Hour Introduction to Medicare Training Module."

- Select VIEW | HEADER and FOOTER from the menu bar.

- Select the "Notes and Handouts" tab from the "Header and Footer" dialog box and check the following boxes:
  - o Date and time
  - o Fixed
  - o Header
  - o Page number
  - o Footer

- In the header section, place the cursor at "Name of Organization" and enter the name of your organization.

- In the footer section, place the cursor at "Date of Course" and enter the date the course will be presented.

- Select "Apply to All."

- Select FILE | SAVE.

- Select FILE | CLOSE.

Customizing and Printing the Pre- and Post-Assessments

- Determine which training modules you will be presenting before customizing and printing the Pre- and Post-Assessments.

- Open the appropriate Pre- and Post-Assessment Word file(s) labeled "07 Chapter 1 Pre Post Assessment" – "13 Chapter 7 Pre Post Assessment" if you are presenting one or more of the 3-Hour Medicare Program training modules.

- Open the Word file labeled "14 Introduction to Medicare Pre Post Assessment" if you are presenting the 1.5-Hour Introduction to Medicare training module.

- Select VIEW | HEADER and FOOTER from the menu bar. Place the cursor at "Insert Name of Organization" in the header section and enter the name of your organization. Place the cursor at "Insert Date of Course" and enter the date the course will be presented.

- Select FILE | PRINT from menu bar. In the "Copies" section of the Print dialog box, enter the required number of Pre- and Post-Assessments based on the expected number of learners and select OK. **Optional**: Print one copy of each Pre- and Post-Assessment file and make additional copies using a copy machine.

- Select FILE | SAVE.

- Select FILE | CLOSE.

- Please make copies of completed Pre- and Post-Assessment answer sheets for your locked, confidential file and mail original answer sheets to:
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  Centers for Medicare & Medicaid Services
  7500 Security Boulevard, Mail Stop C4-13-07
  Baltimore, MD 21244

Preparing the Request for a Centers for a
Medicare & Medicaid Services-Led In-Person Course

- If you would like to request a CMS Regional Office (RO)-led in-person Medicare Resident, Practicing Physician, and Other Health Care Professional Training Program course, open the file labeled "19 Request for Course."

- Select FILE | PRINT.

- Select FILE | CLOSE.

- In the table on page 2, circle the number that you believe best represents the importance of each training module as it relates to the needs of the learners. Count the number of 2s and 3s that you circled. Add up the time required to present the training modules that you circled. Enter this information in the space provided on page 3.

- Ensure that the total time for the training modules you have selected does not exceed the time available for learners to attend the course.

- See page 3 for instructions regarding where to mail or fax the request to your CMS RO.