



**2018 SNP Alliance Fall Leadership Forum**  
***Real World Solutions to Complex Care: Integration Post Permanency***  
**October 18-19, 2018 | Omni Shoreham | Washington, DC**

**– AGENDA –**

**Thursday, October 18**

**8:00am – 5:00pm**  
*Empire Ballroom Foyer*

**Registration**

**8:30am – 9:00am**  
*Empire Ballroom*

**Breakfast**

**8:30am – 9:00am**  
*Empire Ballroom*

**Membership Meeting**

*Cheryl Phillips, MD, AGSF, President and CEO, SNP Alliance*

This is our time to welcome our members and our guests. We will review 2018 SNP Alliance accomplishments and share 2019 priorities. We will introduce our newest Board of Directors. Come prepared to join in discussion and share any questions and ideas you may have to further the work and mission of the SNP Alliance.

**9:00am – 9:45am**  
*Empire Ballroom*

**Opening Session: Congressional Update**

MODERATORS:

- *Elizabeth Barnett, Partner, Avenue Solutions*
- *Ginger Loper, Loper Consulting*

PANELISTS:

- *Adam Buckalew, Professional Staff Member, Committee on Energy and Commerce's Subcommittee on Health, US House of Representatives*
- *Melanie Egorin, PhD, MA, Democratic Deputy Staff Director, Committee on Ways and Means, US House of Representatives*

**9:45am – 10:30am**  
*Empire Ballroom*

**Session: "What is Complex Care? A Real-World View"**

We often use the term "complex care" when talking about high-risk and vulnerable populations. But what do we mean? Complex to whom? This session will help us frame who are the populations that we describe as "complex." We will seek to understand how different perspectives describe complexity, including health plan operations and medical services, all of which may be completely different than the individual or their family care partners — who rarely see their needs as "complex," but rather the sum of their health and support issues. This session will set the stage through this forum as we reflect on "Real World Solutions to Complex Care."

FACILITATOR: *Tom Von Sternberg, MD, Senior Medical Director, Health Partners Health Plan and Medical Group*

PANELISTS:

- *Sepideh Chegini, MD, Senior Medical Officer, CareMore Touch Program*
- *Eve Gelb, Vice President, Health Care Services Administration, SCAN Health Plan*
- *Carol Regan, Senior Advisor, Center for Consumer Engagement in Health Innovation, Community Catalyst*

**10:30am – 10:45am***Empire Ballroom Foyer***Break****10:45am – 11:30am***Empire Ballroom***Session: “The Power of Data with a Focus on SDOH”**

Translating data into information useful to specialized managed care plans continues to be a focus, particularly as it pertains to social determinants of health. This session will explore the issues of data acquisition — the who/where/what of data; how data can be used to stratify, impact and intervene with members, and how and when to evaluate outcomes. Deborah Paone, SNP Alliance, will set the stage with the SNPA survey results and what SNPA members say is needed to improve SDOH data collection. Our presenters, Gerald Osband, MD, and Sam Toney, MD, will discuss how SDOH data is being captured for complex populations and address definitional and standardization issues and how data can be used to provide actionable interventions. David Lima, CareOregon, will give the member response and discuss how they are utilizing SDOH data and provide examples of translating it into actionable interventions.

MODERATOR: *Deborah Paone, DrPH, MHSA, Policy Consultant and Performance Evaluation Lead to SNP Alliance*

PRESENTERS:

- *Gerald Osband, MD, Senior Medical Director, Health Integrated, An ECL Company*
- *Sam D. Toney, MD, Chief Medical Officer, Health Integrated, An EXL Company*

MEMBER RESPONSE:

- *David Lima, Director of Medicare, CareOregon*

**11:30am – 12:30pm***Empire Ballroom***Session: “How are States Positioning for Integration”**

SNPs are now permanent, the BBA has outlined new requirements for integration and CMS has provided some new alignment tools, but states hold many of the cards for further progress. A panel of top integration experts representing states, member plans and researchers will discuss difficult questions such as: What is the status of integration today? Will the BBA requirements push more states toward MLTSS and requirements for aligned D-SNPs? What do “dormant” states need to invest in integration? How are states responding to opportunities for default enrollment? Can integration be successful without increased enrollment alignment? Should passive enrollment be expanded? What is the impact of “look alike” plans on integration? What are the best options for serving partial duals? Are the new SEP requirements too administratively complex to be sustainable? What is the future of the FAI?

MODERATOR: *Melanie Bella, Chief of New Business and Policy, Cityblock Health*

PANELISTS:

- *James M. Verdier, JD, Senior Fellow, Mathematica Policy Research and Integrated Care Resource Center*
- *Jack Rollins, Senior Policy Analyst, National Association of Medical Directors (NAMD)*
- *Damon Terzaghi, Senior Director of Medicaid Policy & Planning, National Association of States United for Aging and Disabilities (NASUAD)*
- *Elizabeth Wood, MPAP, Health Researcher, Mathematica (Formerly Director of Dual Integration, State of New Jersey Medicaid)*

- Allison Rizer, MHS, MBA, Vice President, Policy & Strategy, UnitedHealth Care

**12:30pm – 1:30pm**  
*The Birdcage*

**Networking Lunch and Presentation of the “Bringewatt Spirit of Humanity Award”**

**1:30pm – 2:30pm**  
*Empire Ballroom*

**Session: “Working towards Solutions for Integration – Updates from Guidance and Proposed Rules”**

Policy experts at CHCS and ICRC will share recently-developed tools and tips on key operational details and recent guidance for supporting integration, such as how D-SNPs can work with states to move toward greater enrollment alignment, and how default and passive enrollment can be utilized by D-SNPs, as well as solicit input on questions such as:

- What supports are needed from states and plans to enable utilization of these new enrollment policies?
- What does integrated care coordination entail and how can aligned enrollment, default enrollment, passive enrollment, or other state integration strategies be designed to support integrated care coordination?

MODERATOR: *Pamela J. Parker, MPA, Medicare-Medicaid Integration Consultant, SNP Alliance*

PANELISTS:

- *Michelle Herman Soper, MHS, Director Integrated Care, Center for Health Care Strategies (CHCS)*
- *Nancy Archibald, MHA, MBA, Senior Program Officer, Center for Health Care Strategies (CHCS)*
- *Erin Weir Lakhmani, Health Researcher, Mathematica Policy Research*

**2:30pm – 2:40pm**  
*Empire Ballroom Foyer*

**Break**

**2:40pm – 3:40pm**  
*Empire Room*

**Concurrent Peer Roundtable Breakout Sessions:**

**Breakout A: “Partnering with Community Organizations for Behavioral Health and LTSS – Real World Examples”**

Using the framework of CHCS’ recent issue brief on serving people with serious mental illness through PACE, [Serving Adults with Serious Mental Illness in the Program of All-Inclusive Care for the Elderly: Promising Practices](#), Nancy Archibald will open the discussion on how specialized managed care plans can create community partnerships to better serve members with mental health concerns. Dr. Stacy Ballard from Medica Health Plan will share their strategy and “real-world” approach to behavior health integration.

FACILITATOR: *Nancy Archibald, MHA, MBA, Senior Program Officer Center for Health Care Strategies (CHCS)*

MEMBER PLAN PRESENTERS:

- *Stacy Ballard, MD, Senior Medical Director Physician Services, Medica*

**Breakout B: “C-SNPs and I-SNPs – Strategies for Alignment with State Integration Efforts”**

In this post-permanency environment, how do specialized managed Medicare plans work with states and CMS to both serve their members and fit into an

*Executive Room*

integrated environment? This discussion will be led by two leading experts in both Duals integration and state policy. This will be an interactive discussion with the facilitators and attendees.

FACILITATORS:

- *Rich Bringewatt, President and CEO, National Health Policy Group*
- *Suzanne S. Gore, JD, MSW, Principal, State Health Partners*

**3:40pm – 3:50pm**

*Empire Ballroom Foyer*

**Break**

**3:50pm – 4:50pm**

*Executive Room*

**Concurrent Peer Roundtable Breakout Sessions:**

**Breakout C: “I-SNPs – Best Practices in Complex Care Management”**

Care coordination is a central feature of special needs and Medicare-Medicaid demonstrations plans. In the I-SNP environment, care coordination often is more closely aligned with the providers and clinical services, which is a key element to the added value of Institutional Special Needs Plans. This session will explore what are the components of successful care coordination for an institutional level of care population, and will hear from two members — one plan-based, and one representing provider sponsored plans — as to how they approach care coordination and their Model of Care, including how they manage transitions between settings, coordinating services outside the nursing home, and the role care coordination plays in returning people (as appropriate) back to the community.

FACILITATOR: *Jill Sumner, Consultant*

MEMBER PLAN PRESENTERS:

- *Diane Flynn, Vice President, Institutional Products, Optum Complex Care Management*
- *Beth Ann Martucci, CRNP, DNP, Senior Director Clinical Operations, Provider Partners*

*Empire Room*

**Breakout D: “Real World Quality Measurement - Aligning Measures and Process Improvement”**

As part of its efforts to improve its performance in the CMS Stars Incentive program, Senior Whole Health identified an opportunity to improve the performance of its delivery system in several of the measures sourced from the CAHPS and HOS surveys. Andrew provides a real-world example of an effective strategy for engaging providers around key quality measures and aligning efforts with the special need plan. By crafting a hybrid of HOS and CAHPS elements and providing feedback to provider groups on beneficiary reported outcomes and trends, this approach has proactively engaged providers with positive results.

PRESENTER: *Andrew McClure, Senior Director, Quality Improvement, Senior Whole Health*

**4:50pm – 5:00pm**

*Empire Ballroom Foyer*

**Break**

**5:00pm – 5:30pm**

*Empire Ballroom*

**Session: “Release of the Updated 2019 Version of the Gold Standards Framework**

With input from the SNP Alliance Clinical Leadership Group, we have updated the original SNP Gold Standards Framework, originally developed in 2009. This

revised Gold Standards Frameworks seeks to address updated models and technologies, move away from physician-centric approaches to team-based and person-centered strategies, and set stretch goals for specialized managed care plans to optimally serve high risk, high-cost populations. Joe Perretta will lead an interactive look at this new Gold Standards Framework.

FACILITATOR: *Joe Perretta, Health Policy and Communications Analyst, SNP Alliance*

**5:45pm**

*Empire Patio*

### **Reception**

## **Friday, October 19**

**7:30am – 8:30am**

*Empire Ballroom*

### **Breakfast: “Red-eye Table Discussions”**

David Kulick from Adaption Health will lead a discussion regarding innovations and incubation opportunities for vulnerable populations enrolled in Medicaid.

FACILITATOR: *David Kulick, MPH, Co-Founder, Adaption Health*

**8:30am – 9:45am**

*Empire Ballroom*

### **Session: “CMS Current Topics – Conversations with CMS Leadership and Staff”**

Tim Engelhardt, Director of the Medicare-Medicaid Coordination Office, and members of the MMCO staff will lead a Q&A session facilitated by Pamela Parker. Topics will focus on issues related to implementation of recent guidance, default enrollment and other areas of enrollment alignment, benefit flexibility opportunities, advancing integration — including what are ramifications for D-SNPs in states who have closed markets for D-SNPs or who are not pursuing integrated contracts, and the future of the FAI and current integrated models including whether there may be new state-specific demonstrations that might serve as additional pathways to integration. This will be a dynamic and interactive session where attendees can speak with CMS directly.

MODERATOR: *Pamela J. Parker, MPA, Medicare-Medicaid Integration Consultant, SNP Alliance*

PANELISTS:

- *Tim Engelhardt, Director, Medicare-Medicaid Coordination Office (MMCO), Centers for Medicare and Medicaid Services (CMS)*
- *Paul Precht, BA, Policy Advisor Leader, PACE Demo Workgroup, Medicare-Medicaid Coordination Office, CMS*

**9:45am – 10:30am**

*Empire Ballroom*

### **Session: “Supplemental Benefits – Implications and Challenges”**

Beginning in 2019, all Medicare Advantage (MA) plans will be able to offer new types of supplemental benefits (including, for example, support within and outside the home with the activities of daily living) and, should they so desire, target these benefits to members based on health status and/or disease state. In addition, starting in 2020, MA plans will have even greater flexibility in the offering of supplemental benefits for members who are chronically ill. This session will provide an overview of these new benefit flexibilities and implications for all three types of Special Needs Plans and outline key considerations for designing competitive plan offerings.

PRESENTERS:

- *Danielle Moon, Specialist Leader, Life Sciences and Health Care, Deloitte Consulting, LLP*
- *Eric Goetsch, FSA, MAAA, Principal and Consultant Actuary, Milliman and CSMHCC Payment Policy Advisor*

**10:30am – 10:45am**  
*Empire Ballroom Foyer*

**Break**

**10:45am – 11:15am**  
*Empire Ballroom*

**Session: “Marketing’ in a Post-Permanency Environment: What do Consumers Need to Know When Selecting Plans?”**

Consumers are faced with many choices and considerable “noise” regarding selecting a health plan. For those with complex needs even understanding all the options is daunting. Terms such as “integration” may have great meaning to specialized managed care plans and providers, but often have little context for potential enrollees. Megan Juring and Hillary Haycock will walk through the pilot tool developed by the SCAN Foundation for California, [www.MyCareMyChoice.org](http://www.MyCareMyChoice.org), that seeks to start with the individual’s perspective regarding what they see as their needs — and then help guide them to options that best fit for them. This session will help to focus on the information people need to be informed about their choices and how SNP Alliance members might integrate this into their marketing and communications to potential members.

FACILITATORS:

- *Megan Juring, Program Officer, The SCAN Foundation*
- *Hillary Haycock, President, Harbarger Consulting*

**11:15am – 11:45am**  
*Empire Ballroom*

**Table Discussions: “Working with the Tool - What Do Plans Think is Important?”**

**11:45am – 12:30pm**  
*Empire Ballroom*

**Reaction Panel /Audience Discussion: “How to Engage and Market an Integrated Product - Consumer, Plan and State Perspectives”**

FACILITATORS:

- *Megan Juring, Program Officer, The SCAN Foundation*
- *Hillary Haycock, President, Harbarger Consulting*

PANELISTS:

- *Anne Tumlinson, CEO, Anne Tumlinson Innovations, and Founder, Daughterhood*

**12:30pm – 12:45pm**  
*Empire Ballroom*

**Closing Session: “Wrap-Up, Next Steps & Adjournment”**