



DESIGNING THE FUTURE OF SELF FUNDING



SAVE THE DATE! JULY 15-17, 2019
HYATT REGENCY | DALLAS, TX | hcaa.org | [#HCAATPSummit](https://twitter.com/HCAATPSummit)

SCHEDULE AT-A-GLANCE

MONDAY, JULY 15, 2019

11:00 AM - 1:00 PM REGISTRATION AND NETWORKING WITH SPONSORS

1:00 PM – 1:45 PM OPENING, WELCOME AND INTRODUCTIONS

Joanie Verinder, HCAA President, Carol Berry, CEO and Tim Callender, Emcee

1:45 PM – 3:15 PM KEYNOTE: CONNECT THE DOTS: BREAKTHROUGH THINKING AND THE FUTURE OF SELF-FUNDING!

The future of self-funding will belong to those who create it. The others will be left standing in the dust, wondering what just happened. Change happens quickly, and the leader who can think creatively—on demand!—will have the edge. Okay, that’s great. But aren’t some people (and some leaders) *naturally* creative, while others are naturally...well...*dull*?

Not at all.

For 15 years, multiple Emmy Award winning producer Bill Stainton had to be creative—on demand—each and every week. And he found that breakthrough solutions are not a matter of “waiting for the lightning bolt.” There are tools and techniques that *you* can use to generate your own breakthrough ideas and solutions, whenever you want. In this entertaining, engaging, and interactive keynote, Bill will help you tap into your own innate creative genius so that you can create the future of self-funding!

Presented by: Bill Stainton, TV Producer, Writer, Performer and Author

3:15 PM – 3:30 PM BREAK AND NETWORKING WITH SPONSORS

3:30 PM – 4:30 PM A 360-DEGREE VIEW OF THE SELF-FUNDED MARKETPLACE

Deloitte Consulting’s Patrick Travis will share his perspectives on the self-funded marketplace arising from his project teams’ consulting engagements with large self-insured employers, national and regional carriers/health plans, and large hospital systems in various parts of the country. Hear the trends, what Health Plans may be planning, how providers may react and his thoughts on the implications for self-funded employers.

Presented by: Patrick Travis, Deloitte Consulting, LLP

4:30 PM – 4:35 PM MONDAY SUMMARY

Tim Callender, Emcee

5:30 PM - 7:00 PM WELCOME RECEPTION

TUESDAY, JULY 16, 2019

7:30 AM - 8:30 AM BREAKFAST & NETWORKING WITH THE SPONSORS

8:30 AM - 8:45 AM WELCOME AND NOTICES

Tim Callender, Emcee

8:45 AM – 10:00 AM KEYNOTE: COMPETING TO BE THE BEST – LESSONS FROM THE GAME’S MOST FEROCIOUS TACKLER!

What are the cultural differences between mediocre teams and winning teams, whether they are in sports or business? In this speech, Darren Woodson (5 time Pro Bowl safety and 3 time NFL Super Bowl Champion with the Dallas Cowboys) describes what leaders and teams must embrace in order to build a culture of excellence. Learn how to embrace change, competition, and confrontation within your organizations.

Presented by: Darren Woodson, ESPN Analyst, Former Dallas Cowboy, Entrepreneur and Speaker

10:00 AM - 10:25 AM BREAK AND NETWORKING WITH THE SPONSORS

10:25 AM – 11:40 PM SESSION INFORMATION COMING SOON!

Presented by: Speaker to be Announced Soon!

11:40 AM – NOON EMCEE AND CEO NOTICES

NOON – 1:15 PM HCAA MEMBERSHIP LUNCH, BUSINESS MEETING & MEMBER LONGEVITY AWARDS

Joanie Verinder, HCAA Board President, Carol Berry, CEO, Jim Stanis and Matt Burghardt, Co-Membership Chairs

NOON – 5:00 PM EMERGING LEADERS LUNCHEON AND FULL AFTERNOON SESSION

ELEVATING LEADERSHIP

Elevating Leadership is essential for sustainable growth and predictable results. This workshop will introduce attendees to the strategies necessary to make an impact in the lives of everyone you encounter. With a keen focus on identifying the differences between a *group* and a *team*, you will learn how to develop a solid strategic plan, while setting and accomplishing the goals necessary for success. Discover the secrets of empowering others and prioritizing your actions so you can take your business to new levels.

Presented by: Erik Therwanger, ThinkGREAT moderated by Julie Wohlstein, Centrix Benefit Administrators, Inc.

1:15 PM – 2:15 PM SELF-FUNDING IN 2020 AND BEYOND - TRUE CONSUMERISM

Benefits won't change as much as how they are delivered to the consumer. Drug prices and facility charges may look eerily similar but patient choices and knowledge will be transformed. Join Adam Russo for this entertaining and thought provoking presentation on how the tools of today and tomorrow will enlighten consumers and empower plans like never before.

Presented by: Adam Russo, Esq., Co-Founder and CEO, The Phia Group, LLC

2:15 PM – 2:30 PM BREAK AND NETWORKING WITH SPONSORS

INNOVATIONS IN EMPLOYEE COMMUNICATIONS

What are the new innovations in employee communications? How can TPA's best reach out, steer, educate, incentivize, persuade, and communicate best with their clients and employees? What are some of the best tools/practices being used to provide benefit communication materials currently? What are some of the burning issues (i.e. utilization, access confusion, rising costs) facing employers and driving them to come up with creative solutions. What are some of the considerations Plan Managers and Administrators need to be mindful of when assessing and then implementing a communication campaign/program. What works best, what doesn't work.

Presented by: Bo Armstrong, Datapath, Inc. and Arielle Chalfant, Chalfant Consulting Group

EFFECTIVELY MANAGING YOUR STOP LOSS RELATIONSHIP

This interactive session will explore the critical role that stop loss insurance plays in the self-funding market place. Our discussion will begin with your relationship with your underwriting team and how to work with them in finding the right solutions for your clients. We will discuss the importance of disclosing all significant medical conditions that could lead to a stop loss claim. We will go through the claim filing process and how to avoid last minute disasters and possible denial of claims. Issues that could delay a claim such as improper documentation of eligibility, FMLA, other Leave of Absences, along with Cobra administration are only some of the topics that will be explored. Discussions regarding the importance of understanding the stop loss contract and how managing the exclusions and time limits imposed by the contract are critical to managing your stop loss relationship and should never be a surprise to your claim management team. Last, but definitely not least, we will explore the problems caused by discrepancies between the plan document and employee benefit handbook in the resolution of the stop loss claim.

Presented by: Rodney Gagne, National Underwriting Services, Inc.

RBP RESULTS FROM A STOPLOSS CARRIER/MGU PERSPECTIVE

In many areas of the country there has been a significant move away from traditional PPO plans to various forms of Reference Based Plans which use Medicare rules and a multiple of Medicare to determine the Allowable Expense. While the multiples may vary, the published results have almost always been very favorable, at least from the perspective of TPA's and their clients. This session will focus on the results, experience, and unique challenges, from a carrier and MGU perspective.

Presented by: Dana Driscoll, National Underwriting Services, Inc., Philip Gardham, Companion Group and Ryan Newville, TPAC Underwriters, Inc.

3:30 PM – 3:45 PM BREAK AND NETWORKING WITH SPONSORS

3:45 PM – 5:00 PM BREAK-OUT SESSIONS

HEALTH CARE SHARING MINISTRIES – THEIR EVOLUTION INTO TODAY’S MARKET

Health Care Sharing Ministries (HCSM) have made quite an impact over the past couple of years even though they have been around for a long period of time. Why is that? What has made them so popular? People often ask, are they insurance or are they not? Why were they exempt from ACA? Do you have to believe in God, or can anyone join? All of these are great questions and there will be great answers to these questions. Come take a look into the real HCSM world. Have your own questions ready to ask in person! You will get to embark on a journey and meet the biggest names of the people who have transformed the industry into what it is today. What is the next step in the world of Health Care Sharing? It’s bigger than you can imagine.

Presented by: Ron Bruno, Crown Administrators; Tony Meggs, Sharable; Brian Nates, Remodel Health moderated by Mike Ramsey, Careington International

HOW TO JUGGLE AND STREAMLINE PROCESSES IN A COMPLEX OPERATIONS WORLD

“Why is this process in place?” “I don’t know. That’s just the way it’s always been done.”

Does this conversation sound familiar? When was the last time you really looked at your overall operation to determine if you are handling all processes from implementation to reporting as effectively as possible? Do you still have the proper procedures in place based upon new requirements with your reinsurance carriers, PPOs, RBP plans, etc.? This will be a seventy-five minute session that will address the issues that your TPA Operations personnel will not want to miss!

Presented by: Christine Scutnik, Diversified Group; Pat Umrah, Covenant Services Group; Amy Wooden, ASR Health Benefits moderated by Caryn Rasnick, 90 Degree Benefits (Self Insured Plans)

PPO, RBP and What's Next!

With PPO's becoming more and more questionable on the true value that they bring, the move to RBP has increased dramatically over the last 5 years. The question that begs to be answered is what comes next? This panel discussion brings three experts together to discuss what's next. They offer insights into direct contracting and narrow networks. Are these the same or different payment models? Should one be used over the other? Or, are they strategies that can and should coexist to help TPA's control the cost of health care?

Presented by: Erich Blumberg, Lockton Dunning Benefits; Jordan Hersh, NX Health Network; Mac Meadows, 90 Degree Benefits (Entrust) moderated by Steve Rasnick, 90 Degree Benefits (Self Insured Plans)

5:30 PM – 7:00 PM RECEPTION

WEDNESDAY, JULY 17, 2019

7:30 AM - 8:30 AM BREAKFAST & NETWORKING WITH THE SPONSORS

8:30 AM - 8:45 AM WELCOME AND NOTICES
Tim Callender, Emcee

8:45 AM – 10:00 AM WHAT DOES MEDICARE-FOR-ALL REALLY MEAN?

With the 2020 Presidential election heating up, many contenders are promoting their healthcare plans. The most popular term in politics today is Medicare-for-All. In this session we will review the truth about Medicare-for-All and what it really means. We will look at all the proposals and provide facts about how these would affect our industry. We will explore the role that Health Exchanges will play and what challenges and opportunities these changes could bring to self-funding.

Presented by: Lawrence Thompson, Inventavis, LLC

10:00 AM - 10:20 AM BREAK AND NETWORKING WITH THE SPONSORS

10:20 AM – 11:35 AM DIFFERENTIATING YOUR TPA BY EMBRACING FREE MARKET PROVIDERS

Join FMMA co-founders, Dr. Keith Smith, and Jay Kempton, as they present how to differentiate your business by working directly with providers who believe in transparency and the free market. Learn how the status quo networks, and

other third party facilitators, impede and inhibit your ability to help your clients manage their costs. Dr. Smith and Mr. Kempton will provide you with the tools and knowledge to become your client's hero by integrating free market providers, and true consumer-driven concepts, lowering your client's costs and improving their outcomes.

Presented by: Dr. Keith Smith, Surgery Center of Oklahoma and Jay Kempton, The Kempton Group

11:35 AM – NOON

CLOSING REMARKS

Tim Callender, Emcee and Joanie Verinder, HCAA President

12:30 PM – 5:00 PM

HCAA THIRD ANNUAL CHARITY VOLUNTEER PROJECT – COMMUNITY PARTERS OF DALLAS

Meet in the Hotel lobby at 12:30pm – receive a boxed lunch and go with us to the Community Partners of Dallas to do some hands on projects that support abused and neglected children in the Dallas/Ft. Worth Community! This is a great cause and our opportunity to “give back”. Please join us!