



# Agenda

## 2017 CMS Assister Summit

June 28, 2017

12:00PM - 5PM EDT

June 29, 2017

9:00AM - 5PM EDT



Health Insurance Marketplace

## Thank you for joining us for the 2017 CMS Assister Summit! *Understanding the Evolving Marketplace*

**Day 1** will focus on The Future Role of Assisters

**Day 2** will focus on Optimizing Consumer Experience

Below are three distinct learning tracks, please use the key to determine which sessions you would like to attend, if you are participating in person.

Please note: only sessions in the Grand Auditorium will be webcast.

### Color Code Key of Learning Tracks

 = **Stabilize the Risk Pool through Outreach and Enrollment**

This track focuses on developing best practices for how to work with, educate, and enroll consumers and reach target populations.

 = **How to Run an Accountability Centered Assister Program**

This track focuses on the key tools and skills that have been demonstrated to be most effective in building professional and exceptional assister programs.

 = **Deep Dive on Marketplace Policy and Programs/How to Handle Complex Issues**

This track focuses on providing information and tips for resolving complex and challenging concepts that assisters routinely encounter.



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## 2017 CMS Assister Summit

June 28, 2017

12:00PM - 5PM EDT

Theme of Day One: The  
Future Role of Assisters



Health Insurance Marketplace

12:00 pm - 12:30 pm	<b>CHECK-IN &amp; BADGING</b>		
12:30 pm - 12:50 pm <i>(Grand Auditorium Plenary)</i>	<b>WELCOME &amp; DAY 1 OVERVIEW</b>		
12:50 pm - 1:20 pm <i>(Grand Auditorium Plenary)</i>	<b>VISION FOR ASSISTERS IN THE EVOLVING MARKETPLACE</b>		
1:30 pm - 2:30 pm <i>(Concurrent Sessions)</i>	<b>Grand Auditorium</b>	<b>C-110</b>	<b>C-112</b>
	<b>Data-driven Outreach: Reaching Target Populations</b>	<b>Assister Best Practices on Collaborations</b>	<b>Enrollment Troubleshooting</b>
2:30 pm - 2:45 pm	<b>AFTERNOON BREAK</b>		
2:45 pm - 3:45 pm <i>(Concurrent Sessions)</i>	<b>Grand Auditorium</b>	<b>C-112</b>	<b>C-110</b>
	<b>From Coverage to Care</b>	<b>HIOS Metric Reporting Strategies</b>	<b>Marketplace Appeals</b>
3:55 pm - 5:00 pm <i>(Assister Specific Concurrent Sessions)</i>	<b>Grand Auditorium</b>	<b>C-110 &amp; C-111 &amp; C-112</b>	
	<b>Certified Application Counselor Update Session</b>	<b>Navigator Update Session</b>	

**TRACK KEY:**

- = Stabilize the Risk Pool through Outreach and Enrollment
- = How to Run an Accountability Centered Assister Program
- = Deep Dive on Marketplace Policy and Programs/ How to Handle Complex Issues



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## 2017 CMS Assister Summit

June 29, 2017  
9:00AM - 5PM EDT

Theme of Day Two: Optimizing  
Consumer Experience



Health Insurance Marketplace

8:30 am - 9:00 am	<b>CHECK-IN &amp; BADGING</b>		
9:00 am - 9:15 am <i>(Grand Auditorium)</i>	<b>WELCOME &amp; DAY 2 OVERVIEW</b>		
9:15 am - 10:15 am <i>(Grand Auditorium)</i>	<b>KEEPING CONSUMERS COVERED</b>		
10:15 am - 10:30 am	<b>MORNING BREAK</b>		
10:30 am - 11:30 am <i>(Concurrent Sessions)</i>	<b>Grand Auditorium</b> Overlapping Coverage: Medicaid & the Marketplace	<b>C-111</b> Creating Successful Outreach & Education Events	<b>C-112</b> Market Stabilization Final Rule Overview
11:40 am - 12:40 pm <i>(Concurrent Sessions)</i>	<b>Grand Auditorium</b> Overlapping Coverage: Medicare Transitions	<b>C-111</b> Assister Best Practices on Post-enrollment Assistance	<b>C-112</b> Balancing the Risk Pool: Enrolling New Americans & New Arrivals
12:40 pm - 1:50 pm	<b>LUNCH BREAK</b>		
1:00 pm - 1:40 pm <i>(Working Lunch Sessions)</i>	<b>C-110</b> Working Lunch - Assister Brainstorming on Savvy Social Media Use, Outreach to Vulnerable Populations & Working with Corrections Systems/Courts	<b>C-111</b> Working Lunch - Assister Brainstorming on Innovative Ways to Reach Millennials, Connecting Kids to Coverage & Working with Separating Military	<b>C-112</b> Working Lunch - Assister Brainstorming on Helping Consumers Understand Plan Options, Marketing and Promotion & Working with Medical Providers
1:50 pm - 2:50 pm <i>(Concurrent Sessions)</i>	<b>Grand Auditorium</b> Special Enrollment Periods Overview	<b>C-112</b> Assister Mentoring Project	<b>C-111</b> Balancing the Risk Pool: Enrolling Young Adults & Other Hard-to-Reach Populations
3:00 pm - 4:00 pm <i>(Concurrent Sessions)</i>	<b>Grand Auditorium</b> Special Enrollment Periods Verification	<b>C-111</b> Building Robust Organizations: Best Practices for Hiring, Retention & Managing Subgrantees	<b>C-112</b> Helping Consumers With Employment Related Coverage Issues
4:00 pm - 4:15 pm	<b>AFTERNOON BREAK</b>		
4:15 pm - 5:00 pm <i>(Grand Auditorium)</i>	<b>Assister Town Hall &amp; Closing Remarks</b>		

### TRACK KEY:

- = Stabilize the Risk Pool through Outreach and Enrollment
- = How to Run an Accountability Centered Assister Program
- = Deep Dive on Marketplace Policy and Programs/ How to Handle Complex Issues



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### Learning Track Guide

Use the key below to determine which concurrent sessions you would like to attend, if you are participating in person. Please note: only sessions in the Grand Auditorium will be webcast for viewing by remote participants, these sessions are listed in bold.

#### = Stabilize the Risk Pool through Outreach and Enrollment

This track focuses on developing best practices for how to work with, educate, and enroll consumers and reach target populations.

Session Title	Date & Time
<b>Data-driven Outreach: Reaching Target Populations</b>	<b>Wednesday, 1:30 pm - 2:30 pm EST</b>
<b>From Coverage to Care</b>	<b>Wednesday, 2:45 pm - 3:45 pm EST</b>
Market Stabilization Final Rule Overview	Thursday, 10:30 am - 11:30 am EST
Balancing the Risk Pool: Enrolling New Americans & New Arrivals	Thursday, 11:40 am - 12:40 pm EST
Balancing the Risk Pool: Enrolling Young Adults & Other Hard-to-Reach Populations	Thursday, 1:50 pm - 2:50 pm EST
Helping Consumers with Employment Related Coverage Issues	Thursday, 3:00 pm - 4:00 pm EST

#### = How to Run an Accountability Centered Assister Program

This track focuses on the key tools and skills that have been demonstrated to be most effective in building professional and exceptional assister programs.

Session Title	Date & Time
Assister Best Practices on Collaborations	Wednesday, 1:30 pm - 2:30 pm EST
HIOS Metric Reporting Strategies	Wednesday, 2:45 pm - 3:45 pm EST
Creating Successful Outreach & Education Events	Thursday, 10:30 am - 11:30 am EST
Assister Best Practices on Post-enrollment Assistance	Thursday, 11:40 am - 12:40 pm EST
Assister Mentoring Project	Thursday, 1:50 pm - 2:50 pm EST
Building Robust Organizations: Best Practices for Hiring, Retention, & Managing Subgrantees	Thursday, 3:00 pm - 4:00 pm EST

#### = Deep Dive on Marketplace Policy and Programs/ How to Handle Complex Issues

This track focuses on providing information and tips for resolving complex and challenging concepts that assisters routinely encounter.

Session Title	Date & Time
Enrollment Troubleshooting	Wednesday, 1:30 pm - 2:30 pm EST
Marketplace Appeals	Wednesday, 2:45 pm - 3:45 pm EST
<b>Overlapping Coverage: Medicaid &amp; the Marketplace</b>	<b>Thursday, 10:30 am - 11:30 am EST</b>
<b>Overlapping Coverage: Medicare Transitions</b>	<b>Thursday, 11:40 am - 12:40 pm EST</b>
Special Enrollment Periods (SEP) Overview	Thursday, 1:50 pm - 2:50 pm EST
Special Enrollment Periods (SEP) Verification	Thursday, 3:00 pm - 4:00 pm EST