



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 viewed via 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.

**Disclaimer: A text-only version of this agenda is also available*



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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	CHECK-IN & BADGING		
12:30 pm - 12:50 pm <i>(Grand Auditorium Plenary)</i>	WELCOME & DAY 1 OVERVIEW		
12:50 pm - 1:10 pm <i>(Grand Auditorium Plenary)</i>	VISION FOR ASSISTERS IN THE EVOLVING MARKETPLACE		
1:20pm - 2:20 pm <i>(Concurrent Sessions)</i>	Grand Auditorium Data-Driven Outreach: Reaching Target Populations	C-110 Assister Best Practices on Collaborations	C-112 Enrollment Troubleshooting
2:20 PM - 2:45 PM	AFTERNOON BREAK		
2:45 pm - 3:45 pm <i>(Concurrent Sessions)</i>	Grand Auditorium From Coverage to Care	C-112 HIOS Metric Reporting Strategies	C-110 Marketplace Appeals
3:55 pm - 5:00 pm <i>(Grand Auditorium Plenary)</i>	ASSISTER UPDATE SESSION		

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

**Please Note: Some session titles and times are subject to change.*



Agenda



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	CHECK-IN & BADGING		
9:00 am - 9:15 am <i>(Grand Auditorium Plenary)</i>	WELCOME & DAY 2 OVERVIEW		
9:15 am - 10:15 am <i>(Grand Auditorium Plenary)</i>	KEEPING CONSUMERS COVERED		
10:25 am - 11:25 am <i>(Concurrent Sessions)</i>	Grand Auditorium	C-111	C-112
	Overlapping Coverage: Medicaid & the Marketplace	Creating Successful Outreach & Education Events	Market Stabilization Final Rule Overview
11:25 AM - 12:25 PM	LUNCH BREAK		
	Grand Auditorium - Assister Networking Session		
12:25 pm - 12:55 pm <i>(Optional Concurrent Sessions)</i>	C-111	C-112	C-113
	Assister Brainstorming on Innovative Ways to Reach Millennials, Connecting Kids to Coverage, & Working with Separating Military	Assister Brainstorming on Helping Consumers Understand Plan Options, Marketing and Promotion, & Working with Medical Providers	Assister Brainstorming on Savvy Social Media Use, Outreach to Vulnerable Populations, & Working with Corrections Systems/Courts
1:05 pm - 2:05 pm <i>(Concurrent Sessions)</i>	Grand Auditorium	C-111	C-112
	Overlapping Coverage: Medicare Transitions	Assister Best Practices on Post-enrollment Assistance	Balancing the Risk Pool: Enrolling New Americans & New Arrivals
2:05 PM - 2:20 PM	AFTERNOON BREAK		
2:20 pm - 3:20 pm <i>(Concurrent Sessions)</i>	Grand Auditorium	C-112	C-111
	Special Enrollment Periods (SEP) Overview	Assister Mentoring Project	Balancing the Risk Pool: Enrolling Young Adults & Other Hard-to-Reach Populations
3:30 pm - 4:30 pm <i>(Concurrent Sessions)</i>	Grand Auditorium	C-111	C-112
	Special Enrollment Periods (SEP) Verification	Building Robust Organizations: Best Practices for Hiring, Retention, & Managing Subgrantees	Helping Consumers with Employment Related Coverage Issues
4:40 pm - 5:00 pm <i>(Grand Auditorium Plenary)</i>	Assister Town Hall & Closing Remarks		

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

**Please Note: Some session titles and times are subject to change.*

We Support **GO GREEN**



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Health Insurance Marketplace

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
Data-driven Outreach: Reaching Target Populations	Wednesday, 1:20 pm - 2:20 pm EDT
From Coverage to Care	Wednesday, 2:45 pm - 3:45 pm EDT
Market Stabilization Final Rule Overview	Thursday, 10:25 am - 11:25 am EDT
Balancing the Risk Pool: Enrolling New Americans & New Arrivals	Thursday, 1:05 pm - 2:05 pm EDT
Balancing the Risk Pool: Enrolling Young Adults & Other Hard-to-Reach Populations	Thursday, 2:20 pm - 3:20 pm EDT
Helping Consumers with Employment Related Coverage Issues	Thursday, 3:30 pm - 4:30 pm EDT

= 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, 1:20 pm - 2:20 pm EDT
HIOS Metric Reporting Strategies	Wednesday, 2:45 pm - 3:45 pm EDT
Creating Successful Outreach & Education Events	Thursday, 10:25 am - 11:25 am EDT
Assister Best Practices on Post-enrollment Assistance	Thursday, 1:05 pm - 2:05 pm EDT
Assister Mentoring Project	Thursday, 2:20 pm - 3:20 pm EDT
Building Robust Organizations: Best Practices for Hiring, Retention, & Managing Subgrantees	Thursday, 3:30 pm - 4:30 pm EDT

= 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, 1:20 pm - 2:20 pm EDT
Marketplace Appeals	Wednesday, 2:45 pm - 3:45 pm EDT
Overlapping Coverage: Medicaid & the Marketplace	Thursday, 10:25 am - 11:25 am EDT
Overlapping Coverage: Medicare Transitions	Thursday, 1:05 pm - 2:05 pm EDT
Special Enrollment Periods (SEP) Overview	Thursday, 2:20 pm - 3:20 pm EDT
Special Enrollment Periods (SEP) Verification	Thursday, 3:30 pm - 4:30 pm EDT