# Agenda

# 2017 CMS Assister Summit

# June 28, 2017

# 12:00 PM to 5 PM EDT and

# June 29, 2017

# 9:00 AM to 5 PM EDT

**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 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.

## Learning Tracks

### Track One (Blue Track) = 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.

### Track Two (Orange Track) = 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.

### Track Three (Green Track) = 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.

# 2017 CMS Assister Summit

# June 28, 2017

# 12:00PM - 5PM EDT

# Theme of Day One: The Future Role of Assisters

12:00 pm - 12:30 pm **CHECK-IN & BADGING**

12:30 pm - 12:50 pm **WELCOME & DAY 1 OVERVIEW** (*Grand Auditorium Plenary)*

12:50 pm - 1:10 pm **VISION FOR ASSISTERS IN THE EVOLVING MARKETPLACE** (*Grand Auditorium Plenary)*

1:20 pm - 2:20 pm (*Concurrent Sessions*)

Track 1 **Data-Driven Outreach: Reaching Target Populations** Grand Auditorium

Track 2 **Assister Best Practices on Collaborations** C-110

Track 3 **Enrollment Troubleshooting** C-112

2:20 pm - 2:45 pm **AFTERNOON BREAK**

2:45 pm - 3:45 pm (*Concurrent Sessions*)

Track 1 **From Coverage to Care** Grand Auditorium

Track 2 **HIOS Metric Reporting Strategies** C-112

Track 3 **Marketplace Appeals** C-110

3:55 pm – 5:00 pm (*Grand Auditorium Plenary*)

**ASSISTER UPDATE SESSION**

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

# 2017 CMS Assister Summit

# June 29, 2017

# 9:00 AM - 5PM EDT

# Theme of Day Two: Optimizing Consumer Experience

8:30 am - 9:00 am **CHECK-IN & BADGING**

9:00 am - 9:15 am **WELCOME & DAY 2 OVERVIEW** (Grand Auditorium Plenary)

9:15 am – 10:15 am **KEEPING CONSUMERS COVERED** (Grand Auditorium Plenary)

10:25 am - 11:25 am (*Concurrent Sessions*)

Track 3 **Overlapping Coverage: Medicaid & the Marketplace** Grand Auditorium

Track 2 **Creating Successful Outreach & Education Events** C-111

Track 1 **Market Stabilization Final Rule Overview** C-112

11:25 am - 12:25 pm **LUNCH BREAK**

12:25 pm - 12:55 pm (*Optional Concurrent Sessions*)

**Grand Auditorium – Assister Networking Session**

No Track Identified: **Assister Brainstorming** on Innovative Ways to Reach Millennials, Connecting Kid to Coverage & Working with Separating Military  
C111

No Track Identified: **Assister Brainstorming** on Helping Consumers Understand Plan Options, Marketing and Promotions & Working with Medical Providers C112

No Track Identified: **Assister Brainstorming** on Savvy Social Media Use, Outreach to Vulnerable Populations & Working with Corrections Systems/Courts C113

1:05 pm - 2:05 pm (*Concurrent Sessions*)

Track 3 **Overlapping Coverage: Medicare Transitions** Grand Auditorium

Track 2 **Assister Best Practices on Post-enrollment Assistance** C-111

Track 1 **Balancing the Risk Pool: Enrolling New Americans & New Arrivals** C112

2:05 pm - 2:20 pm **AFTERNOON BREAK**

2:20 pm - 3:20 pm (*Concurrent Sessions*)

Track 3 **Special Enrollment Periods (SEP) Overview** Grand Auditorium

Track 2 **Assister Mentoring Project** C-112

Track 1 **Balancing the Risk Pool: Enrolling Young Adults & Other Hard-to-Reach Populations** C111

3:30 pm - 4:30 pm (*Concurrent Sessions*)

Track 3 **Special Enrollment Periods (SEP) Verification** Grand Auditorium

Track 2 **Building Robust Organizations: Best Practices for Hiring, Retention & Managing Subgrantees** C-111

Track 1 **Helping Consumers with Employment Related Coverage Issues** C112

4:40 pm - 5:00 pm (*Grand Auditorium Plenary*)

**Assister Town Hall & Closing Remarks**

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

# Learning Track Guide

Use the Track Identification 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.

**Track 1 (Blue Track) = 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 (Webcast) Wednesday, 1:20 pm - 2:20 pm EDT
    - From Coverage to Care (Webcast) 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

**Track 2 (Orange Track) = 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

**Track 3 (Green Track) =** 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 assister 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 (Webcast) Thursday, 10:25 am - 11:25 am EDT

Overlapping Coverage: Medicare Transitions (Webcast) Thursday, 1:05 pm - 2:05 pm EDT

Special Enrollment Periods (SEP) Overview (Webcast) Thursday, 2:20 pm - 3:20 pm EDT

Special Enrollment Periods (SEP) Verification (Webcast) Thursday, 3:30 pm - 4:30 pm EDT