2017 CMS Assister Summit

June 28, 2017
12:00PM - 5PM EDT

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

Health Insurance Marketplace

SUMMIT GUIDE

CMS

CENTERS FOR MEDICARE & MEDICAID SERVICES

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Program Overview

The Center for Medicare & Medicaid Services (CMS) is pleased to announce that registration is open for the 2017 CMS Assister Summit: Understanding the Evolving Marketplace, held on site at CMS in Baltimore, Maryland and via Webcast. Join CMS for this interactive event which will include in-depth assister training and education on a variety of topics that support Marketplace program integrity and stability.

This two day event will be held on **Wednesday, June 28, 2017**, from **12pm – 5pm EDT** and **Thursday, June 29, 2017** from **9am – 5pm**.

Day 1 will focus on The Future Role of Assisters
Day 2 will focus on Optimizing Consumer Experience

Color Code Key of Learning Tracks

Please Note: Only sessions in the Grand Auditorium will be available via webcast.

= 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 guide is also available*

Agenda June 28, 2017

12:00 pm - 12:30 pm	**CHECK-IN & BADGING**		
12:30 pm - 12:50 pm (*Grand Auditorium Plenary*)	**WELCOME & DAY 1 OVERVIEW**		
12:50 pm - 1:10 pm (*Grand Auditorium Plenary*)	**VISION FOR ASSISTERS IN THE EVOLVING MARKETPLACE**		
1:20 pm - 2:20 pm *(Concurrent Sessions)*	**Grand Auditorium**	**C-110**	**C-112**
	Data-Driven Outreach: Reaching Target Populations	**Assister Best Practices on Collaborations**	**Enrollment Troubleshooting**
2:20 PM - 2:45 PM	**AFTERNOON BREAK**		
2:45 pm - 3:45 pm *(Concurrent Sessions)*	**Grand Auditorium**	**C-112**	**C-110**
	From Coverage to Care	**HIOS Metric Reporting Strategies**	**Marketplace Appeals**
3:55 pm - 5:00 pm *(Grand Auditorium Plenary)*	**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 June 29, 2017

8:30 am - 9:00 am	**CHECK-IN & BADGING**		
9:00 am - 9:15 am *(Grand Auditorium Plenary)*	**WELCOME & DAY 2 OVERVIEW**		
9:15 am - 10:15 am *(Grand Auditorium Plenary)*	**KEEPING CONSUMERS COVERED**		
10:25 am - 11:25 am *(Concurrent Sessions)*	**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**		
12:25 pm - 12:55 pm *(Optional Concurrent Sessions)*	**Grand Auditorium - Assister Networking Session**		
	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 *(Concurrent Sessions)*	**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 *(Concurrent Sessions)*	**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 *(Concurrent Sessions)*	**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 *(Grand Auditorium Plenary)*	**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.

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***

On-site Participants

Housekeeping Rules

- All visitors must be in possession of a valid and current government issued form of photo identification, such as a driver's license, age of majority card, passport or visa; and will be subject to a thorough vehicular inspection.
- Assister Summit attendees must restrict themselves to the first floor Central Building Lobby, Conference Room Center, and Lower Level Lobby/Cafeteria in the Central Building.
  PLEASE NOTE: VISITORS MUST BE ESCORTED BY A CMS EMPLOYEE OUTSIDE OF THE AREAS LISTED ABOVE.
- Food and beverages are not allowed in the Grand Auditorium, so please refrain from bringing items into these areas.
- Smoking is **not permitted** anywhere in the CMS complex. You must go offsite to smoke.
- Telephones and restrooms are located just outside the Pre-function Area on the left before you go back to the Central Building first floor lobby and also across the first floor lobby near the central building security desk.
- The cafeteria is located on the lower level of the Central Building. Lunch will begin at 11:25 am. There will be an afternoon break at 2:05 pm. Please have your money ready for the cashier when you get in line.

Hotel and Travel Accommodations

Summit Venue

Centers for Medicare & Medicaid Services
Central Building
7500 Security Boulevard
Baltimore, MD 21244

Baltimore/Washington International Airport (BWI) serves as the most convenient airport in the Baltimore, MD area. For additional airport, ground transportation, car rentals, and shuttle information, please click here.

For hotel accommodations, it is recommended that you lodge in downtown Baltimore or near the Baltimore Washington International airport.

Transportation

Train Service

Baltimore is served by AMTRAK which is located at Pennsylvania Station (Penn Station), five minutes north of the downtown area. The fast moving Metro liner has brought back the grand age of trains between Baltimore, Washington, DC, Philadelphia, and New York. The MARC commuter train operates weekdays along the Baltimore/Washington corridor with two lines that leave from Washington's Union Station and arrives in Baltimore at either Camden or Penn Station.

BWI Airport Shuttle and Taxi Service

Baltimore/Washington International Airport (BWI) is approximately 14 miles away — a 15-30 minute ride to CMS. The taxi fare from the airport vicinity to CMS can vary in price (approximately $20-$30). Also, there are various shuttle services available. You'll need to contact them directly to arrange for this service and confirm their current prices along with the departure/arrival schedules.

If a taxi service is required to and/or from the CMS Central Building, it is recommended that you schedule your taxi service in advance for drop off and/or pick up. For helpful tips while visiting the Baltimore, MD area, please click here.

Car Rental

The majority of car rental agencies listed below service BWI Airport:

- Alamo
- Avis*
- Budget
- Dollar*
- Enterprise*
- Hertz*
- National
- Thrifty*

*Provides vehicles with hand controls for drivers with special needs.

On-site Participants

Directions

Southbound

From New York City: I-95 South to I-695 East (Baltimore Beltway) towards Glen Burnie. Follow I-695 to Exit 17 (Security Boulevard – West). Follow Security Boulevard to the end and CMS' main entrance will be located on your right.

From Central Pennsylvania: I-83 South to I-695 East (Baltimore Beltway) towards Glen Burnie. Follow I-695 to Exit 17 (Security Boulevard – West). Follow Security Boulevard to the end and CMS' main entrance will be located on your right.

Northbound

From Washington, DC: I-95 North to I-695 West (Baltimore Beltway) towards Towson. Follow I-695 to Exit 17 (Security Boulevard – West) toward Rolling Road. Follow Security Boulevard to the end and CMS' main entrance will be located on your right.

From BWI Airport: Baltimore and Washington Parkway (MD-295) to I-695 West (Baltimore Beltway) towards Towson to Exit 17 (Security Boulevard – West) toward Rolling Road. Follow Security Boulevard to the end and CMS' main entrance will be located on your right.

General Information

Check-in/Badging

Check-in is located in the main lobby at CMS for non-CMS participants, and will open Wednesday, June 28th at 12pm and Thursday, June 29th at 9am EDT. All Assister Summt attendees are required to wear their badges at all times during the event. Badges are not transferable.

On-site Participants

Changes/Cancellations
If your organization's representative is unable to attend, please email us at CTEO@cms.hhs.gov immediately so that we can accommodate other participants on-site.

Accommodations for People with Special Needs*
- Assistive listening devices for the hearing impaired
- Captioning services
- Interpreters
- Foreign language services
- Special mobility service for the physically challenged
- Large print or Braille material
- Special access considerations
- Designated areas for wheelchairs and visually impaired

*May be available upon request by June 12, 2017.

Automated Teller Machine (ATM)
For your convenience, there is an ATM cash machine on the lower level next to the Credit Union.

Mobile Phone Use
Please be courteous to event speakers and fellow attendees by silencing your mobile phones while attending sessions.

First Aid Information
Due to the large size of the facility, be prepared to identify the location of the emergency exits. A first aid station is available within CMS. We ask that event attendees please contact event staff immediately should you require assistance.

Security/Emergency Information
Building security is available 24 hours a day, 365 days a year and is responsible for the overall protection of the CMS facility, property, visitors, and employees, as well as for providing service and assistance to all patrons.

Smoking Policy
CMS is a nonsmoking building. Smoking is prohibited in all areas.

Lunch Service Options at CMS
Order lunch from the CMS cafeteria from your mobile device or online and have it ready and waiting for you in the building! That's right — no need to spend money on gas — just beat the heat and relax at your seat as we prepare your lunch for you! The CMS cafeteria accepts all major credit cards.

PRE-ORDERS DEADLINE DATE: Wednesday, June 21st by 11:59pm EDT.
On-site event attendees can pre-order their lunch in advance in order to expedite the process. Due to the large number of attendees, there will be 150 pre-order lunches available. Pre-orders must be done online (see links below) no later than **11:59 pm EDT, Wednesday, June 21st**.

You must create an account and password in order to place your order for pickup at the CMS cafeteria.

- **Catering Made Easy:**
  https://cms.catertrax.com/shopcatgroup.asp?id=1&intOrderID=&intCustomerID=
- **Simply to Go Catering:**
  https://cms.catertrax.com/shopcatgroup.asp?id=2&intOrderID=&intCustomerID=

On-site Participants

CHECKLIST In preparation, we encourage you to take a few minutes to review the following:

- **ONLY PRE-AUTHORIZED EVENT ATTENDEES WILL BE ALLOWED ON-SITE:** ***Please arrive at CMS' Headquarters no later than one hour before the start of the event*** in order ensure that all event attendees are able to clear the CMS security procedures and are comfortably prepared to attend the event.

- **Note:** Please provide the CMS Security Guards at the front gate with your first and last name, valid and current photo ID and the nature of your visit (ex: CMS Assister Summit). Only registered/pre-authorized attendees on our list will be allowed to enter CMS.

- **Parking:** Visitor parking is available and is indicated by white lines. Do not park between the yellow lines as there is the risk of your vehicle being ticketed and towed.

- **CMS Onsite Security Procedures:** CMS security procedures comprise of a vehicle search, walkthrough scanning device, and X-ray scanning of personal items. All visitors must provide at least one form of a valid photo ID (ex: drivers license); and will be signed in by a member of the summit staff who will escort you to the CMS auditorium.

- **CMS Grand Auditorium:** All visitors will be briefed on the resources and amenities of CMS upon arrival and will have access to the CMS Grand auditorium. The CMS Grand Auditorium is equipped with a live video/audio feed of the webcast.

- **Lunch Service Options at CMS: CAFETERIA PRE-ORDERS DEADLINE DATE: Wednesday June 21st by 11:59pm EDT.** Due to the large number of attendees, there will be 150 pre-order lunches available. ***You must create an account and password in order to place your order for pickup at 7500 Security Blvd.*** **Catering Made Easy:** https://cms.catertrax.com/shopcatgroup.asp?id=1&intOrderID=&intCustomerID= or **Simply to Go Catering:** https://cms.catertrax.com/shopcatgroup.asp?id=2&intOrderID=&intCustomerID=.

  CMS Farmers Market: Local farmers and producers will sell fresh fruits, vegetables, artisan breads, and more from 10:30 am – 1:30 pm in the Central Building Lower Lobby Courtyard. When we eat locally grown foods, including fresh fruits and vegetables, we promote good health, help support local farmers, and reduce our personal environmental footprints. Shop…Buy…and Eat Locally!

- **Event Materials:** Event materials (i.e., agenda, presentations, Summit Guide, etc.) prior to your arrival to the event — are available in advance here: http://www.cms.gov/Outreach-and-Education/Training/CTEO/Upcoming_Current_Events.html. Certain materials will also be printed and available for in-person attendees.

- **Your Points of Contact:** Should you encounter any difficulties during your travels to CMS Headquarters, please contact us via email at CTEO@cms.hhs.gov.

Webcast Participants

Viewing Tips for USTREAM

This summit can be viewed virtually by using two different application platforms, YouTube or USTREAM.

To view and access the webcast, use Google Chrome.

YouTube: In order to view the live stream of the summit via YouTube, make sure you have the most up to date browser and a good Internet connection. If you are having difficulty playing the following live stream please either use Internet Explorer to view the live stream or change your YouTube player from Flash to HTML5 and refresh your browser window. The Flash based YouTube player is currently not accessible to screen readers. Click here to visit the YouTube HTML5 page to switch your player if you are having trouble playing this video.

USTREAM: To learn more information regarding tips for the best viewing experience on "USTREAM," click this link: https://ustream.zendesk. com/entries/22546906-Tips-for-Best-Viewing-Experience-on-Ustream.

You will be able to obtain information and instructions on how to:

- Watch at a lower quality
- Update browser
- Install and update Adobe Flash
- Check internet and bandwidth
- Check computer resources
- Disable or enable hardware acceleration
- Check that USTREAM content is not blocked by an Ad-Blocker, Firewall, or being filtered on your local network
- Solve the most common problems
- View the event from a mobile device — most streams on USTREAM are available for viewing on iOS and Android devices

How to Join the Webcast

Please Note: In order to join the live webcast, you must register for this event. Only confirmed registered participants, will be able to access and join the live webcast by clicking the link provided in the registration confirmation and calendar appointment.

The webcast will be held Wednesday, June 28, 2017 from 12:00 pm – 5:00 pm EDT and Thursday, June 29, 2017 from 9am – 5pm. **To facilitate easy access to the webcast, please log in 30 minutes early.**

All participants will be able to see and, using speakers and/or headphones, hear the webcast via their computer. Participants will not be able to participate verbally during the webcast. However, participants will be able to submit questions electronically.

Technical Support

CMS will provide a call-in feature for this event for use by those attendees who (1) cannot access sound from their computers, or (2) may experience technical difficulties. Attendees should not call the teleconference line unless it is necessary to hear the webcast.

Attendees should report **technical difficulties** by contacting the CTEO TechSupport Team via email at CTEOTechSupport@cms.hhs.gov during the webcast. If you need to utilize the call-in feature, the number will be provided to you at that time.

CHECKLIST In preparation, we encourage you to take a few minutes to review the following:

- ❍ In order to join the live webcast, you must register for this event. Only confirmed registered participants will be able to access and join the live webcast.
- ❍ Click the following link to get more information regarding tips for the best viewing experience on USTREAM: https://ustream.zendesk.com/entries/22546906-Tips-for-Best-Viewing-Experience-on-Ustream.
- ❍ Report technical difficulties by contacting the CTEOTechSupport team via email at CTEOTechSupport@cms.hhs.gov during the webcast. If you need to utilize the call-in feature, the number will be provided to you at that time.

Additional Resources

CTEO Website

To learn more about this event and future events, please visit our website: http://cms.gov/Outreach-and-Education/Training/CTEO/Compliance_Training_Education_and_Outreach.html.

Event Materials

Event materials can be found on our Outreach and Education web page at: http://www.cms.gov/Outreach-and-Education/Training/CTEO/Upcoming_Current_Events.html.

Post Event Online Survey

Please complete your ***CMS Assister Summit*** evaluation survey online at:

https://www.surveymonkey.com/r/2017_Assister_Summit_Participant_Final

The survey will be available until 9:00 pm EDT, Friday, July 7, 2017

Technical Support

Report technical difficulties by contacting the CTEOTechSupport Team via email at CTEOTechSupport@cms.hhs.gov during the webcast.

Special Thanks to...

- CM Leadership
- CCIIO Leadership
- CCIIO Consumer Support Group
- CMS & Guest Speakers
- OC – CMS Division of Design Services
- OSSO – CMS Logistical & Technical Team
- CTEO Team – CM/BOS2 Staff and PRI & Poll Everywhere® (CTEO Contractor Support)

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7500 Security Boulevard
Baltimore, MD 21244