



**CENTER FOR DRUG AND HEALTH PLAN CHOICE**

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**MEMORANDUM**

DATE: February 20, 2009

TO: All MA Organizations, PDPs, PACE Organizations, Cost Plans, and Demonstrations

FROM: Abby L. Block, Director

SUBJECT: CMS Calendar Year 2010: Medicare Advantage (MA) and Part D National Conference

The Centers for Medicare & Medicaid Services (CMS) invites you to participate in the Contract Year (CY) 2010 Medicare Advantage and Part D National Conference. CMS' conference will include presentations on the following: Part C & D Policy; Part C & D Benefits; Part C & D Compliance; Special Needs Plans (SNP) Models of Care; Part C & D Marketing Surveillance; Actuarial Perspective on Bids; Medicare Enrollment and Appeals and HPMS Technical Bid Submission issues and other topics. Additional training sessions are available on the proper completion and submission of the Formulary, Bid Pricing Tool (BPT), and Plan Benefit Package (PBP) into the Health Plan Management System (HPMS). Listed below are the various training sessions with dates and the method of training (i.e., In-person, Videoconference, Video Streaming/Podcast, Conference Call and Videotape). The various training sessions are described in detail on the subsequent pages.

**Calendar of Training Sessions**

March 9, 2009	Release of Formulary Training Video Streaming/Podcast
March 31 & April 1, 2009	Plan Benefit Package (PBP) Hands-on Beginner Training, Baltimore, MD
April 2, 2009	Medicare Advantage and Part D National Conference, Baltimore, MD
April 3, 2009	Plan Benefit Package (PBP) Hands-on Advanced Training, Baltimore, MD
April 8, 2009	Formulary Training Question & Answer Conference Call
April 10, 2009	Release of BPT Training Video Streaming/Podcast
April 24, 2009	Release of Medicare Advantage & Prescription Drug Plans Conference Videotape

## **CY 2010 Medicare Advantage and Part D Videoconferencing/Videotaping**

### **Formulary Training**

- Date: March 9, 2009
- Audience: Formulary contacts and health plan staff who are involved in the creation and upload of HPMS formulary files.
- Description: This training will describe the Part D Formulary submission process and highlight key changes for CY 2010. The formulary reference file will be discussed, as well as field by field instructions for the formulary flat file. Updates to the formulary submission module will also be reviewed.

### **BPT Training**

- Date: April 10, 2009
- Audience: Actuaries and others involved with the Bid preparation process.
- Description: This session is geared toward individuals who will be preparing and/or certifying the Part C or Part D BPT. Professionals attending this training should be familiar with the requirements of the respective programs and the 2010 Bid forms and instructions, and have these documents available for reference while viewing the presentation.

### **Medicare Advantage and Prescription Drug Plans Conference - Videotape**

- Date: April 24, 2009
- Audience: Chief Executive Officers, Chief Financial Officers, Marketing Directors, Medicare Operational/Compliance Managers, Premium Underwriters, and others involved in benefit development and submission of Bid packages.
- Description: CMS' Conference will include presentations on the following: Part C & D Policy; Part C & D Benefits; Part C & D Compliance; Special Needs Plans (SNP) Models of Care; Part C & D Marketing Surveillance; Actuarial Perspective on Bids; Medicare Enrollment and Appeals; HPMS Technical Bid Submission issues, and other topics. The Conference will include training on the proper completion and submission of the Formulary, Bid Pricing Tool (BPT), and Plan Benefit Package (PBP) into the Health Plan Management System (HPMS).

The Videotape of the conference will be available at [www.cms.hhs.gov/apps/events/docs/Conference\\_ID\\_356/bidconference.html](http://www.cms.hhs.gov/apps/events/docs/Conference_ID_356/bidconference.html) on the CMS website. The videotape will be available throughout the remainder of 2009.

## **Conference Call Session:**

### **Formulary Training Question & Answer Conference Call**

- Date: April 8, 2009
- Audience: Formulary contacts and Health Plan staff that have viewed the Formulary Training Video Streaming/Podcast that was released March 9, 2009.
- Description: This question and answer session will afford plans the opportunity to receive feedback on questions related to the Formulary Training Video Streaming/Podcast. Dial-in info and materials will be distributed by CMS' Part C & D User Call contractor,

Management Solutions Consulting Group (MSCG), prior to the call. If you are not already registered with MSCG, register at <http://mscginc.com/registration>. A valid CMS contract number is required.

## **In-Person Training Sessions:**

These are **paperless training** sessions; participants should download all training materials prior to arriving at the training session. Presentation materials for each individual event will be available at [www.cms.hhs.gov/apps/events/docs/Conference\\_ID\\_356/bidconference.html](http://www.cms.hhs.gov/apps/events/docs/Conference_ID_356/bidconference.html) on March 27, 2009. Presentation materials and printing capabilities will not be available onsite.

### **Medicare Advantage & Part D National Conference**

Date: April 2, 2009  
Time: Registration - 7:30 a.m. to 9:00 a.m.  
Conference - 9:00 a.m. to 3:30 p.m.  
Location: CMS Auditorium, 7500 Security Boulevard, Baltimore, MD 21244  
Capacity: Seating capacity is 500. Registration is limited to no more than three participants from each organization. Additional participants from the same organization will be placed on a waitlist and permitted to attend as space permits.  
Audience: Chief Executive Officers, Chief Financial Officers, Marketing Directors, Medicare Operational/Compliance Managers, Premium Underwriters, and others involved in benefit development and submission of Bid packages.

CMS will provide reasonable accommodations for individuals with disabilities. If you require a reasonable accommodation in order to participate in this meeting/training, please contact Geralyn Glenn at [geralyn.glenn@cms.hhs.gov](mailto:geralyn.glenn@cms.hhs.gov) or 410-786-0973 or Venita Scott at [venita.scott@cms.hhs.gov](mailto:venita.scott@cms.hhs.gov) or 410-786-3139 no later than two weeks prior to the conference so we can ensure appropriate accommodations.

Description: CMS' Conference will include presentations on the following: Part C & D Policy; Part C & D Benefits; Part C & D Compliance; Special Needs Plans (SNP) Models of Care; Part C & D Marketing Surveillance; Actuarial Perspective on Bids; Medicare Enrollment and Appeals; and HPMS Technical Bid Submission issues, and other topics. Conference agenda is included in this announcement and is subject to change.  
Registration: To register for the Conference, please go to: <http://cmsconference.hcmsllc.com>. Registration via the website will be available beginning on or about **February 20, 2009**. Registration will close on **March 26, 2009**.

**Note: Registration is on a first-come first-serve basis.** You are NOT registered for this event until you receive an email confirmation of your enrollment. Please keep this email for your records.

If you wish to cancel your registration, please contact Mary Beth at (304) 368-0288.

### **PBP Software Hands-On Training Sessions for BEGINNER USERS**

Date: March 31, 2009 - 9:00 am – 3:30 pm EDT; **OR**  
April 1, 2009 - 9:00 am – 3:30 pm EDT

Location: CMS Development Center, 7111 Security Boulevard, Baltimore, MD 21244

**PBP Software Hands-On Training Sessions for ADVANCED USERS**

Date: April 3, 2009 - 9:00 am – 11:30 am **OR** 1:00pm - 3:30pm EDT

Location: CMS Development Center, 7111 Security Boulevard, Baltimore, MD 21244

Audience: The PBP hands-on sessions in Baltimore are split into two separate trainings – one for beginner PBP users and one for advanced PBP users. Due to space constraints, we are limiting registration for the PBP hands-on sessions to no more than two participants from each organization. If there are two participants attending from the same organization, you may be asked to share a computer due to space limitations. Additional participants from the same organization will be waitlisted and permitted to attend as space permits. No participants will be allowed to enter the training session if they have not registered.

Description: The beginner class will cover all parts of the PBP software, including plan creation, downloading the software, and completing data entry. The advanced user class will only focus on the technical changes to the CY 2010 PBP software.

Registration: To register for the Hands-on PBP Training, please go to: <http://cmsconference.hcmsllc.com>. Registration via the website will be available beginning on or about **February 20, 2009**. Registration will close on **March 26, 2009**.

**Note:** You are NOT registered for this event until you receive an email confirmation of your enrollment. Please keep this email for your records.

If for some reason you can no longer attend the session you registered for, please contact Sara Walters immediately at [Sara.Walters@cms.hhs.gov](mailto:Sara.Walters@cms.hhs.gov). Please indicate “PBP Hands-on Cancellation” as well as the date and time of the session you registered for in the subject line of your email.

If you cannot attend the hands-on training, a webinar that includes slides and material from the hands-on training will be scheduled shortly. In addition, the Power Point Presentations will be made available online. Further information on the webinar and slides will be provided at a later date.

**Helpful Information for In-Person Attendees:**

**Security Procedures**

All in-person training sessions will be held in Federal buildings; therefore, strict security procedures will be enforced and proper identification is required. Participants attending the April 2nd conference in the CMS Auditorium should arrive at least one to two hours prior to the scheduled start time for the conference in order to clear the security checkpoint and check-in at the registration desk. Visitors are subject to a vehicular search and can only gain access through the Central Building Main Lobby.

Participants attending the PBP hands-on sessions should arrive at least 15-30 minutes before the scheduled start time for their PBP class in order to clear the security checkpoint. Registered participants will be allowed into the building only during the time block reserved for their PBP class.

All visitors must be on a pre-approved list and have two forms of identification (ID). One form of ID must be a valid (non-expired), government-issued photo ID card (i.e., driver's license, age of majority card, official school ID, etc.) and another supporting photo ID. Visitors will be issued a temporary building pass from the guard at each Federal Building Main Lobby.

Federal buildings will have scanning devices at all guarded building entrances to comply with the Department of Justice's vulnerability assessment of our complex. The walkthrough scanners expedite entry to comply with increased security measures. Our walkthrough devices are the same as used by the airport and are certified safe for everyone, including during pregnancy. The scanners allow for safe and reliable examination of all parcels, including purses, brought into the complex. If a suspicious item shows on the monitor screen, the guard is authorized to request the individual to remove the item from the package to be further examined. Failure to comply, and dependent upon the nature of the item, will result in a delay in admittance while the Federal Police are dispatched to assist the guard. Guards conduct a normal visual inspection of bags when individuals exit the complex.

Visitors entering the building with a laptop computer will be asked to remove the computer from the carrying case and will be required to register the computer's serial number in the computer log book.

### **CMS Privacy Policy**

Federal law requires us to tell you how we collect, use, share, and protect your personal information. Federal law also limits how we can use your personal information. Protecting the privacy and security of consumers' personal information is very important to us. Please read this notice carefully to understand what we do with the personal information we collect both online and offline.

CMS may collect personally identifiable information (name, e-mail address, physical address, and other unique identifiers) only if specifically and knowingly provided by you.

When you contact us to complete the registration process, any personal information you provide is voluntary. We collect and use only the minimum information necessary to respond to your request to participate in the CMS Calendar of Training Sessions. In most cases, we collect limited information, such as name, address, telephone number, or email address. Failure to complete the required fields may cause a delay in processing your application or denial of enrollment.

### **When do we collect personal information?**

#### **When you contact us...**

to register for Training Events Calendar with a link to our contractor site for registration activities, or make inquiries about the program.

#### **When we contact you...**

to ask if you will participate in a registrant's survey.  
to provide information in response to registration for training.

#### **When we contact others...**

to collect information about potential registrants.

### **Where does your information go?**

Within CMS...

- we contact applicants to complete our registration process.

- our contractors use your information when they perform certain services, such as enrolling applicants, or processing registration for training sessions.
- we work with our other government agencies to cooperate with oversight.

Personally identifying information collected will be used only in connection with cms.hhs.gov and medicare.gov, or for such purposes as are described at the point of collection.

CMS will protect the personal information that you share with us. CMS does not disclose, give, sell, or transfer any personal information to third parties. **Information collected is for registration purposes only.**

Questions or Complaints about This Privacy Policy should be directed to:

Geralyn Glenn  
Division of Finance & Benefits  
Medicare Drug and Health Plan Contract Administration Group  
Center for Drug and Health Plan Choice  
Centers for Medicare & Medicaid Services  
7500 Security Blvd.  
Baltimore, MD 21244

or

CMS Privacy Officer  
Centers for Medicare & Medicaid Services  
7500 Security Boulevard, N2-04-27  
Baltimore, MD 21244-1849

### **E-Mail**

While CMS will make every attempt to protect the personal information that you share with us, electronic mail is not secure against interception.

### **Parking**

Parking is very limited. All participants are encouraged to use cab/limo or car pool.

### **Smoking**

Smoking is not permitted anywhere on the Agency single site campus. Those wishing to smoke can only do so outside of the fenced area surrounding the CMS campus.

### **Meals (CMS Single Site)**

Breakfast, lunch, and snacks can be purchased in the CMS cafeteria. All food and beverages must be consumed in the dining area.

The Sodexo Cafe and Food Court (located in the lower level of the Central Building) offers a variety of top quality meals in a pleasant, modern surrounding. The dining room accommodates a total of 425 guests at one seating (weather permitting - outdoor seating will accommodate an additional 100 guests). Breakfast is served daily from 6:30 a.m. to 9:30 a.m. The breakfast menu features gourmet

and regular coffees, hot breakfast bar and grill, fresh fruit bar, and a delicious variety of fresh gourmet bakery items. Coffee and bakery items are served daily from 9:30 a.m. to 10:30 a.m. Lunch is served starting at 11:00 a.m. and continues to 2:00 p.m. The lunch menu offers daily specials of two hot entrees, a variety of fresh vegetables and side dishes, soup and salad bar, deli sandwiches, a special dessert bar, fresh fruits, soft frozen yogurt and assorted ice creams, sodas, milk, coffee, and tea. Coffee, cookies, brownies, ice cream, and frozen yogurt remain available from 2:00 p.m. to 3:00 p.m.

Jazzman’s Coffee Stand, located in the lower level lobby, is open from 6:30 a.m. to 3:30 p.m. and offers specialty coffee, tea and pastries.

### Questions:

If you have any questions regarding the program content please call one of the following contacts:

<b>Topic</b>	<b>Contact Name</b>	<b>Contact Number</b>
Bid Pricing Tool (BPT)	Debbie Chaney	(410) 786-8164
Formulary	Brian Martin	(410) 786-1070
Health Plan Management System (HPMS)	Sara Walters	(410) 786-3330
Medicare Advantage Benefits	Lori Ashby	(410) 786-6322
Part D Prescription Drug Policy	Vanessa Duran	(410) 786-8697
Part D Benefits	Judith Geisler	(410) 786-4670
Part C Policy	Marty Abeln	(410) 786-1032
Compliance Enforcement	Christine Reinhard	(410) 786-2987
Compliance Policy & Operations	Jennifer Smith	(410) 786-1404
Plan Benefit Package (PBP) software training	Sara Walters	(410) 786-3330

If you have any general inquires regarding the Conference, please email [CMSConference@HCMSLLC.com](mailto:CMSConference@HCMSLLC.com). For telephone inquiries call 304-368-0288 (Attention: Mary Beth).

**CONFERENCE AGENDA: THURSDAY, APRIL 2, 2009**

**CY2010 Medicare Advantage and Part D National Conference**

- 7:30 -9:00**                    **Registration - Auditorium Lobby**
- 8:15 – 9:00**                    **Meet and Greet CMS Staff**
- 9:00 – 9:20**                    **Welcome and Opening Remarks**
- 9:20 – 9:50**                    **Overview of Part C Plan Benefits Policy**  
Director, Division of Policy, Analysis and Planning
- 9:50 – 10:20**                    **Plan Benefit Packages (PBP) – Part C**  
Jane Andrews, Director, Division of Finance and Benefits
- 10:20 – 10:40**                    **Break**
- 10:40 – 11:20**                    **Part C & D Compliance Overview**  
Brenda Tranchida, Director, Program Compliance and Oversight Group
- 11:20 – 11:50**                    **Models of Care**  
Director, Division of Special Programs
- 11:50 – 12:20**                    **Part C & D Marketing & Surveillance**  
Director, Division of Medicare Advantage Operations
- 12:20 – 12:30**                    **Morning Q&A Session**
- 12:30 – 1:30**                    **Lunch**
- 1:30 – 1:50**                    **An Actuarial Perspective on Bids for CY 2010**  
Paul Spitalnic, Director, Office of the Actuary, Part C and Part D Actuarial Group
- 1:50 – 2:30**                    **Overview of Part D Plan Benefits Policy & Plan Benefit Packages**  
Vanessa Duran, Technical Advisor, Part D Policy, Division of Drug Plan Policy and Quality  
Judith Geisler, Director, Division of Formulary and Benefit Operations
- 2:30 –3:00**                    **Medicare Enrollment and Appeals**  
Anthony Culotta, Director, Medicare Enrollment and Appeals Group
- 3:00 – 3:20**                    **Key Technical Bid Submission Issues – Health Plan Management System (HPMS)**  
Sara Walters, HPMS Systems Analyst, Division of Plan Data
- 3:20 – 3:30**                    **Afternoon Q&A Session**