



CENTER FOR BENEFICIARY CHOICES

DATE: February 26, 2008

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

FROM: Abby L. Block, Director

SUBJECT: CMS Annual Bidding Conference

The Centers for Medicare & Medicaid Services (CMS) invites you to participate in the Contract Year (CY) 2009 Annual Bidding Conference. CMS' Annual Bidding Conference will encompass 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), as well as a discussion about the Medicare Options Compare (MOC) website. The CY 2009 Conference will be delivered via three methods: In-person, Conference Call, and Video Streaming/ Podcast. Listed below are the various training sessions with dates and methods of training. The various training sessions are described in detail on the subsequent pages.

Calendar of Training Sessions

March 5, 2008	Release of Formulary Training Video Streaming/Podcast
April 2, 2008	Formulary Training Question & Answer Conference Call
April 4, 2008	Release of HPMS Training Video Streaming/Podcast
April 8, 2008	Release of BPT Training Video Streaming/Podcast
April 10, 2008	Medicare Advantage and Prescription Drug Plans Conference; Baltimore, MD
April 9 & 11, 2008	Plan Benefit Package (PBP) Hands-on Training; Baltimore, MD
April 21 & 22, 2008	Plan Benefit Package (PBP) Hands-on Training; Chicago, IL
April 24 & 25, 2008	Plan Benefit Package (PBP) Hands-on Training; Atlanta, GA
April 25, 2008	Release of Medicare Advantage & Prescription Drug Plans Conference Video Streaming/Podcast
May 1 & 2, 2008	Plan Benefit Package (PBP) Hands-on Training; San Francisco, CA
May 5, 2008	Release of PBP Software Training Video Streaming/Podcast

Video Streaming/Podcast Training:

The Video Streaming/Podcast trainings will be available on the CMS website at http://www.cms.hhs.gov/apps/events/docs/Conference_ID_356/bidconference.html on the date indicated below. These trainings will continue to be available throughout the remainder of 2008.

Formulary Training

Date: March 5, 2008

Audience: Formulary contacts and Health Plan staff that 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 2009. 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.

HPMS Training

Date: April 4, 2008

Audience: HPMS users who are involved with the Bid submission process.

Description: This session will provide an overview of the Bid submission process including Plan Creation, Bid Download, PBP Installation, Bid Upload, Service Area Verification, and Plan Crosswalk.

BPT Training

Date: April 8, 2008

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 2009 Bid forms and instructions, and have these documents available for reference while viewing the presentation.

Medicare Advantage and Prescription Drug Plans Conference

Date: April 25, 2008

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: The conference will provide an overview of Medicare Advantage and Part D benefit policy, the Bidding process from an actuarial perspective, the key changes to the HPMS Bid submission process and the Medicare Options Compare (MOC) website. **Note:** This session will be the same training that participants receive at the in-person Conference. We encourage individuals that are unable to attend in person to use this medium for training.

PBP Software Training

Date: May 5, 2008

Audience: PBP Software users who are involved in completing the PBP.

Description: This session will cover all parts of the PBP software. Topics will include the Rx section of the PBP software and changes and enhancements made to the PBP software for the

CY 2009 season. **Note:** This session will be the same training that participants receive in the Hands-On PBP sessions. We encourage individuals that are unable to attend in person to use this medium for training.

Conference Call Session:

Formulary Training Question & Answer Conference Call

Date: April 2, 2008

Audience: Formulary contacts and Health Plan staff that have viewed the Formulary Training Video Streaming/Podcast.

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 will be available on the CMS website at <http://www.cms.hhs.gov/MedicareAdvPartDTrain/> on March 31, 2008. Presentation materials will not be available onsite.

Medicare Advantage & Prescription Drug Plans Conference

Date: April 10, 2008

Location: CMS Auditorium; 7500 Security Boulevard; Baltimore, MD 21244

Capacity: Seating capacity is 500. Registration is limited to no more than two persons per plan.

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 are in need of special provisions, please contact Carlene Randolph at carlene.randolph@cms.hhs.gov or 410-786-4008 as soon as possible so we can ensure accommodations are met.

Description: The conference will provide an overview of Medicare Advantage and Part D benefit policy, the Bidding process from an actuarial perspective, the key changes to the HPMS Bid submission process and the Medicare Options Compare (MOC) website. **Note:** Please see the agenda attached to this memo for further details on the conference topics.

Registration: To register for the Conference, please go to:
http://www.cms.hhs.gov/apps/events/docs/Conference_ID_356/bidconference.html.
(Click on Upcoming Events > Show only box and select either by date or type in the word "Bid Conference". Scroll down and select "Medicare Advantage and Prescription Drug Plans Conference" to register. Registration via the website will be available beginning March 10, 2008. Registration will close on April 7, 2008.)

PBP Software Hands-On Training Sessions for NOVICE USERS

Date: April 9 - 9:00 am – 12:30 pm OR 1:30pm - 5:00pm EDT; OR
April 11 - 9:00 am – 12:30 pm EDT
Location: CMS Development Center; 7111 Security Boulevard, Baltimore, MD 21244

PBP Software Hands-On Training Sessions for EXPERIENCED USERS

Date: April 9 - 9:30 am – 11:30 am OR 1:30pm - 3:30pm EDT; OR
April 11 - 9:30 am – 11:30 am EDT
Location: CMS Development Center; 7111 Security Boulevard, Baltimore, MD 21244

PBP Software Hands-On Training Sessions for ALL LEVELS

Date: April 21 - 8:30 am – 12:00 noon OR 1:30pm - 5:00pm CDT; OR
April 22 - 8:30 am – 12:00 noon OR 1:30pm - 5:00pm CDT
Location: CMS Chicago Office; 233 N. Michigan Avenue; Chicago, IL 60601

Date: April 24 - 8:30 am – 12:00 noon OR 1:30pm - 5:00pm EDT; OR
April 25 - 8:30 am – 12:00 noon EDT
Location: CMS Atlanta Office; 61 Forsyth Street SW; Atlanta, GA 30303

Date: May 1- 8:30 am – 12:00 noon OR 1:30pm - 5:00pm PDT; OR
May 2 -8:30 am – 12:00 noon
Location: CMS San Francisco Office; 90 Seventh Street, San Francisco, CA 94103

Audience: The PBP hands-on sessions in Baltimore are split into two separate trainings – one for novice PBP users and one for experienced PBP users. The PBP hands-on sessions in Chicago, Atlanta, and San Francisco are intended for both novice and experienced PBP users. Due to space constraints, we are limiting registration for the PBP hands-on sessions to no more than 1 participant from each organization. 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: This class will cover all parts of the PBP software; the Baltimore training for experienced users will only focus on the changes to the CY 2009 PBP software.

Registration: To register for the Hands-on PBP Training you must send an email to Kristin Finch (Kristin.Finch@cms.hhs.gov) and Sara Walters (Sara.Walters@cms.hhs.gov) with the following information:

1. In the Subject line, please indicate “PBP CY2009 Training: <Desired Location>, <desired date>, <desired time slot>”
2. Name of attendee
3. Phone Number and email address of attendee
4. Organization Name and/or Contract Number(s)
5. Level of experience (beginner or advanced user)

You will receive confirmation of your registration via email.

Note: Your registration must be received and confirmed no later than one week prior to the scheduled training session you wish to attend.

If for some reason you can not attend the session, please contact Kristin Finch and Sara Walters immediately via the email addresses listed above. Please indicate “PBP Hands-

on Cancellation” as well as the location, date and time of the session you registered for in the subject line of your email.

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 10 sessions 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 check point 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 check point. 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. 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.

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 Sodexho 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 11:15 a.m. and continues to 1:30 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 1:30 p.m. to 3:00 p.m.

Jazzman's Coffee Stand, located in the lower level lobby, is open from 6:30 am to 3:30 pm and offers specialty coffee, tea and pastries.

Questions:

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

Bid Pricing Tool (BPT) – Debbie Chaney at (410) 786-8164

Formulary – Brian Martin at (410) 786-1070

Health Plan Management System (HPMS) – Kristin Finch at (410) 786-2873

Medicare Advantage Benefits – Erik Thorne at (410) 786-3694

Medicare Options Compare (MOC) – Mel Sanders at (410) 786-8355

Part D Prescription Drug Benefits – Denise McDonnell (410) 786-0157

Plan Benefit Package (PBP) software – Sara Walters at (410) 786-3330

If you have any logistical questions regarding the Conference, please call Carlene Randolph at (410) 786-4008 or Myrika Awoyera at (410) 786-3132.

If you have any questions regarding the technical aspects of the Video Streaming/Podcast, please call DuVa Clyburn at (410) 786-2161.

ATTACHMENT - CONFERENCE AGENDA:

**Medicare Advantage and Prescription Drug Plans Conference Agenda
CMS Baltimore Auditorium
Thursday, April 10, 2008**

8:00 - 10:00	Registration – Auditorium Lobby
10:00 -10:20	Opening Remarks and Goals of the Conference Abby L. Block, Director, Center for Beneficiary Choices
10:20 – 10:30	Introduction David Lewis, Director, Medicare Advantage Group Cynthia Tudor, Director, Medicare Drug Benefit Group
10:30 – 11:30	Overview of Plan Benefits Policy for 2009 Jerry Mulcahy, Director, Division of Policy, Analysis and Planning MA Plan Benefit Packages (PBP) Reviews & Negotiations Jane Andrews, Director, Division of Benefits Quality Improvement in PBP Submission and Plan Corrections Erik Thorne, Bid Team Lead, Division of Benefits
11:30 – 12:00	Suppressions and Medicare Options Compare Mel Sanders, Technical Advisor, Office of Beneficiary Information Services, Website Project Management Group
12:00 – 1:00	Lunch
1:00 – 1:30	From an Actuarial Perspective Paul Spitalnic, Director, Office of the Actuary, Part C & Part D Actuarial Group
1:30 - 2:30	Overview of Part D Plan Benefits Policy Vanessa Duran, Technical Advisor, Division of Drug Plan Policy & Analysis Part D Plan Benefit Packages (PBP) Denise McDonnell, Part D Benefits Lead, Division of Finance & Operations
2:30 – 3:00	Key Bid Submission Issues – Health Plan Management System Kristin Finch, HPMS Systems Analyst, Division of Plan Data
3:00	Question & Answer Session