

# Virtual Fourth National Medicare Advantage Summit

**April 11 – 14, 2023**

**Virtual Online Video Event Live and Archived  
with 24/7 access for six months**

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**[www.medicareadvantagesummit.com](http://www.medicareadvantagesummit.com)**

The Medicare Advantage Summit offers Tuition Scholarships to representatives of local, state and federal government, consumer advocate organizations, safety net providers, academics, students, representatives of health services research organizations, and those who have lost their jobs as a result of the COVID-19 pandemic.

**AGENDA SUBJECT TO UPDATES AND CHANGE.  
Agenda current as of February 9, 2023.**



**MEDIA PARTNERS:**

HealthAffairs

HARVARD  
health policy  
REVIEW



# AGENDA-AT-A-GLANCE

All times listed are EDT.

## DAY I: TUESDAY, APRIL 11, 2023

### 10 am – 10:50 am **MINI SUMMITS GROUP I** (Concurrent Sessions)

**1: The Basics: Traditional Medicare or Medicare Advantage: How Older Americans Choose and Why**

**2: Emerging Plan/Provider Risk Models: Lessons Learned and Which will Prevail**

**3: The Evolution of Medicare Advantage Supplemental Benefits**

**4: Weathering the Return to Post-pandemic Normal and Numerous Proposed Changes to the Stars Calculations**

### 10:55 am – 11:45 am **MINI SUMMITS GROUP II** (Concurrent Sessions)

**5: The Basics: An Update on Key Issues Related to the Medicare Advantage/Part C and D Programs**

**6: MA Provider Case Study: A Fireside Chat with Raúl F. Montalvo Orsini, MD, President, MSO of Puerto Rico**

**7: Sifting Through the Noise and Narrative: Evaluating the Value of Supplemental Benefits**

**8: Community Health Plans Medicare Advantage Delivery Innovations**

### 11:50 am – 12:40 pm **MINI SUMMITS GROUP III** (Concurrent Sessions)

**9: How Medicare Advantage Could Address Pain Inequities For Black Patients Living With Serious Illness**

**10: Innovative Approaches in Provider/Payer Collaboration at Care Transitions**

**11: MA Provider Case Study: A Fireside Chat with Carlos O. Hernandez, MD, FACP, President, WellMed Medical Group: Innovations in Clinician Recruitment and Retention in Today's Primary Care Environment**

**12: Supplemental Benefit Case Studies**

### 1 – 5:15 pm **OPENING PLENARY SESSION: BACKGROUND AND POLICY SETTING**

- Heritage Health System Welcome
- Co-chair Introductions and Summit Overview
- CMS Medicare Advantage Keynote Address: Meena Seshamani, MD, PhD, Director, Center for Medicare
- Update on Recent CMS Advantage Proposed Rules, Regulations and Initiatives
- Overview of the 2024 Rate Notice
- Sustaining and Strengthening Medicare Advantage
- A Perspective on the Role of Medicare Advantage and Value-based Care with Donald M. Berwick, MD
- A Perspective on the Role of Medicare Advantage and Value-based Care with George Halvorson
- Before Rushing to Criticize Medicare Advantage, Let's Take a Close Look at the Alternative

## DAY II: WEDNESDAY, APRIL 12, 2023

### 10 am – 10:50 am **MINI SUMMITS GROUP IV** (Concurrent Sessions)

**13: Risk Adjustment: It's Time For Reform**

**14: MA Provider Case Study: A Fireside Chat with Mark Mantei, MHSA, CEO, Vancouver Clinic: Innovations in Physician Group and MA Plan Collaboration**

**15: The Impact of the New Marketing Regulations on Broker Operations**

**16: The Growth of Dual Eligible Special Needs Plans**

### 10:55 am – 11:45 am **MINI SUMMITS GROUP V** (Concurrent Sessions)

**17: The Group Medicare Option: Why Are More Large Employers Turning to MA for Retiree Health Solutions?**

**18: MA Plan Care Study: A Fireside Chat with Brandon Cuevas, Chief Growth Officer, Employer & Individual, UnitedHealthcare**

**19: How Are Independent Practices Innovating to Successfully Care for the Growing Medicare Advantage Population?**

**20: The Implications of Medicare Advantage Marketing Regulation on Downstream Providers**

### 11:50 am – 12:40 pm **MINI SUMMITS GROUP VI** (Concurrent Sessions)

**21: Why HCC Coding is Critical to Medicare Advantage Care Management**

**22: MA Provider Care Study: A Fireside Chat with Clive Fields, MD, Co-founder and CMO, VillageMD: On the Road to Value — Clinical and Economic Alignment between Primary and Specialty Physicians**

**23: Virtual Care: Your Secret Weapon for Happy Members and Improved MA Star Ratings**

**24: Encouraging Physician Uptake of Z-Codes to Document Non-Medical Barriers to Better Health**

**25: MA Provider Case Study: A Fireside Chat with Chris Wing, CEO, Alpine Physicians: Restoring the Joy of Physician Practice in Medicare Advantage: Specific Actions for Success**

## WEDNESDAY, APRIL 12 CONTINUED

1 – 4:15 pm

### DAY II PLENARY SESSION: CLINICAL AND OPERATIONAL INNOVATION

- Co-chair Welcome and Introductions
- CMS Innovation Center Keynote Address: Driving Medicare Advantage Innovation by Ellen Lukens, MPH, Deputy Director, CMS Innovation Center
- MedPAC Keynote Fireside Chat
- Health Plan Keynote
- CMMI MA VBID-Model Case Studies
- Improving Outcomes for Medicare Advantage Patients with Diabetes
- Comparison of Care Quality Metrics in 2-Sided Risk Medicare Advantage vs Fee-for-Service Medicare Programs

## DAY III: THURSDAY, APRIL 13, 2023

10 am – 10:50 am

### MINI SUMMITS GROUP VII (Concurrent Sessions)

26: Strategic Implications: Medicare Advantage Now Chosen by the Majority of Minority and Low-Income Beneficiaries

27: MA Provider Case Study: A Fireside Chat with June Simmons, President and Chief Executive Officer, Partners in Care Foundation: Medicare Advantage: Innovations in Social Care “Hub Work”

28: Meeting the Needs of Medicare Advantage Beneficiaries with Complex Health Challenges

29: The Role of States in the Regulation of Medicare Advantage Marketing

10:55 am – 11:45 am

### MINI SUMMITS GROUP VIII (Concurrent Sessions)

30: Medicare Advantage Outperforms Fee-for-Service on Certain Diabetes Outcomes

31: MA Health Plan Case Study: A Fireside Chat with John Baackes, Chief Executive Officer, LA Care Health Plan

32: How to Make a Field Marketing Organizations (FMO) Audit Proof

33: Overview of the New Provider Directory Accuracy and Network Adequacy Requirements

11:50 am – 12:40 pm

### MINI SUMMITS GROUP IX (Concurrent Sessions)

34: Lessons Learned from Insurtechs Challenges in Medicare Advantage Implementation: Oscar Health, Clover Health and Bright Health

35: Addenda, One-Way Chart Reviews and Other Trends in Upcoding Lawsuits

36: MA Provider Case Study: A Fireside Chat with Chris Chen, MD, Chief Executive Officer, ChenMed: Proactive Outreach is the Key to Treating Seniors in MA

37: OPEN

1 – 4:45 pm

### DAY III PLENARY SESSION: LAW, REGULATION AND COMPLIANCE

- Co-chair Welcome and Introductions
- DOJ and OIG Government Oversight and Enforcement with regard to the Medicare Advantage Program
- Medicare Advantage Whistleblower Litigation
- Implications of the Inflation Reduction Act to the Medicare Advantage Program and Participants
- Risk Adjustment and the Potential Impact of the Final RADV Rule
- Responding to RADV, OIG Audits, the Overpayment Rule and Other Tools for Enforcing Risk Adjustment Requirements
- New Medicare Marketing Requirements and Best Practices for Compliance
- Prior Authorization Update

## DAY IV: FRIDAY, APRIL 14, 2023

10 am – 3 pm

### DAY IV CLOSING PLENARY SESSION: POLITICS, POLICY AND THE FUTURE

- Co-chair Welcome and Introductions
- Health Plan Medicare Advantage Innovation Roundtable
- The Role of Medicare Advantage in Advancing Health Equity
- Return on Investment (ROI) on Medicare Advantage Social Determinants of Health (SDOH) Strategies
- Capitol Hill Staff Roundtable
- Fireside Chat: The Politics of Medicare Advantage
- The Future of Medicare Advantage
- Summit Adjournment

# VIRTUAL FOURTH NATIONAL MEDICARE ADVANTAGE SUMMIT

## Virtual Online Video Event — Live and Archived

Produced by:



All times are EDT.

Agenda current as of February 9, 2023.

### TUESDAY, APRIL 11, 2023

#### DAY I MORNING MINI SUMMITS

##### MINI SUMMITS GROUP I 10:00 am – 10:50 am

(Concurrent sessions. All will be available on the Summit video archive at the end of the day broadcast.)

###### Mini Summit 1: The Basics: Traditional Medicare or Medicare Advantage: How Older Americans Choose and Why

###### 10:00 am Introduction, Discussion and Q&A

**Gretchen Jacobson, PhD**, Vice President, Medicare, The Commonwealth Fund; Former Analyst, Health Care Financing, Congressional Research Service, New York, NY

**Faith Leonard, MPH**, Program Associate, Advancing Medicare, The Commonwealth Fund; Former Senior Budget Analyst, NYC Office of Management and Budget, New York, NY

###### Mini Summit 2: Emerging Plan/Provider Risk Models: Lessons Learned and Which will Prevail

###### 10:00 am Introductions, Discussion and Q&A

**Jeff Goldsmith**, President, Health Futures, Charlottesville, VA

**Brian Jeffrey, MS**, Principal, Jeffrey Healthcare Consulting LLC; Former SVP, Network Management, UnitedHealth; Former VP, Provider Network Strategy, PacifiCare, Corona del Mar, CA

**Don Crane, JD**, Former President & CEO, America's Physician Groups; Co-producer Primary Care Transformation Summit and Medicare Advantage Summit, Los Angeles, CA (Moderator)

###### Mini Summit 3: The Evolution of Medicare Advantage Supplemental Benefits

###### 10:00 am Introductions, Discussion and Q&A

**Tyler Overstreet Cromer, MPA**, Principal and Head, Medicare, Innovation Practice, ATI Advisory; Former Chief, Health and Human Services Branch, Office of Management and Budget, Alexandria, VA

###### Mini Summit 4: Weathering the Return to Post-pandemic Normal and Numerous Proposed Changes to the Stars Calculations

###### 10:00 am Introductions, Discussion and Q&A

**Daphne Klausner, MA**, Plan President, Honest Medical Group; Former Senior Vice President and President, Government Markets, Independence Blue Cross, Nashville, TN

**Melissa Newton Smith**, Executive Vice President, Consulting & Professional Services, HealthMine, Inc.; Former Senior VP, Stars & Strategy, Gorman Health Group; Former Director, Medicare Star Operations, Cigna-HealthSpring, Brentwood, TN (Moderator)

###### 10:50 am Transition Break

##### MINI SUMMITS GROUP II 10:55 am – 11:45 am

(Concurrent sessions. All will be available on the Summit video archive at the end of the day broadcast.)

###### Mini Summit 5: The Basics: An Update on Key Issues Related to the Medicare Advantage/Part C and D Programs

###### 10:55 am Introductions, Discussion and Q&A

**Mandy Asgeirsson, MPH**, Director, Berkeley Research Group, Washington, DC

**Melissa A. Wong, JD**, Partner, Healthcare & Life Sciences, Holland & Knight LLP, Boston, MA

###### Mini Summit 6: MA Provider Case Study: A Fireside Chat with Raúl F. Montalvo Orsini, MD, President, MSO of Puerto Rico, Ponce, Puerto Rico: Medicare Advantage: Lessons from Puerto Rico

###### 10:55 am Introductions, Discussion and Q&A

**Raúl F. Montalvo Orsini, MD**, President, MSO of Puerto Rico, Ponce, Puerto Rico

###### Interviewed by:

**Don Crane, JD**, Former President & CEO, America's Physician Groups; Co-producer Primary Care Transformation Summit and Medicare Advantage Summit, Los Angeles, CA

###### Mini Summit 7: Sifting Through the Noise and Narrative: Evaluating the Value of Supplemental Benefits

###### 10:55 am Introductions, Discussion and Q&A

**Tim Murray, FSA, MAAA**, Principal, Wakely Consulting Group; Former AVP, Pricing & Forecasting, InnoVita Health, New York, NY

###### Mini Summit 8: Community Health Plans Medicare Advantage Delivery Innovations

###### 10:55 am Introductions, Discussion and Q&A

**Ceci Connolly**, President and Chief Executive Officer, Alliance of Community Health Plans; Founding Member, Women of Impact, Washington, DC (Moderator)

###### 11:45 am Transition Break

##### MINI SUMMITS GROUP III 11:50 am – 12:40 pm

(Concurrent sessions. All will be available on the Summit video archive at the end of the day broadcast.)

###### Mini Summit 9: How Medicare Advantage Could Address Pain Inequities For Black Patients Living With Serious Illness

###### 11:50 am Introductions, Discussion and Q&A

**Brynn Bowman, MPA**, Chief Executive Officer, Center to Advance Palliative Care; Assistant Professor, Brookdale Department of Geriatrics and Palliative Medicine, Icahn School of Medicine at Mount Sinai, New York, NY

Session Continued Next Page

All times are EDT.

**Brittany M. Chambers, MPH, MCHES**, Director, Health Equity and Special Initiatives, Center to Advance Palliative Care, New York, NY

**Kimberly A. Curseen, MD, FAAHPM**, Director of Outpatient Supportive Care, Emory Palliative Care Center; Associate Professor, Division of Palliative Medicine, Emory University School of Medicine, Atlanta, GA

**Allison Silvers, MBA**, Chief Health Care Transformation Officer, Center to Advance Palliative Care; Former Chief Strategy Officer, VillageCare, New York, NY (Moderator)

### Mini Summit 10: Innovative Approaches in Provider/Payer Collaboration at Care Transitions

11:50 am Introductions, Discussion and Q&A

**Jacquelyn Cawley, DO, MBA**, Vice President of Population Health and Chief Medical Officer for Ambulatory Care, BayCare Health System; Former CMIO and Associate CMO, MaineHealth, Yarmouth, ME

**Matthew Collins, MD, MBA**, Executive Vice President and Chief Medical Officer, Blue Cross Blue Shield Rhode Island; Former Senior Medical Director Medical Affairs, Fallon Community Health Plan, Boylston, MA

**Bianca Duff, PA-C, MPH, PA-C**, Senior Vice President, Clinical Operations, CareMax; Former SVP, Clinical Operations, Steward Health Care, Boston, MA

**Sashi Moodley, MD, MBA**, Chief Clinical Officer, Walgreens Health; Former VP Medical Director, CareMore Health, Los Angeles, CA

**Anant Vasudevan, MD, MBA**, Chief Medical Officer, Radial Analytics; Instructor in Medicine, Harvard Medical School; Hospitalist, Brigham and Women's Hospital, Boston, MA (Moderator)

### Mini Summit 11: MA Provider Case Study: A Fireside Chat with Carlos O. Hernandez, MD, FACP, President, WellMed Medical Group: Medicare Advantage: Innovations in Clinician Recruitment and Retention in Today's Primary Care Environment.

11:50 am Introductions, Discussion and Q&A

**Carlos O. Hernandez, MD, FACP**, President, WellMed Medical Group, San Antonio, TX

Interviewed by:

**Don Crane, JD**, Former President & CEO, America's Physician Groups; Co-producer Primary Care Transformation Summit and Medicare Advantage Summit, Los Angeles, CA

### Mini Summit 12: Supplemental Benefit Case Studies

11:50 am Introductions, Discussion and Q&A

**Lauren Driscoll, MPH**, Founder and Chief Executive Officer, NourishedRx; Co-Chair, Entrepreneurs Council, United States of Care, Stamford, CT

**Shreya Kangove, MD, MS**, Executive Director, Penn Center for Community Health Workers, Associate Professor, Medicine, Perelman School of Medicine, University of Pennsylvania, Philadelphia, PA

**Lauren Flynn Kelly**, Managing Editor, AIS Health, an MMIT company; Editor, Radar on Medicare Advantage, Washington, DC (Moderator)

12:40 pm Break and Visit Exhibit Hall

## OPENING PLENARY SESSION: BACKGROUND AND POLICY SETTING

1:00 pm



Welcome Fireside Chat

**Richard Merkin, MD**, Founder, President and Chief Executive Officer, Heritage Group; Board, California Institute of Technology and USC Keck School of Medicine; Founder Richard Merkin Foundation for Stem Cell Research, Broad Institute, Harvard and MIT, Los Angeles, CA



Interviewed by:

**Don Crane, JD**, Former President & CEO, America's Physician Groups; Co-producer Primary Care Transformation Summit and Medicare Advantage Summit, Los Angeles, CA

1:15 pm



Co-chair Introductions and Summit Overview

**Mary Beth Donahue, MPP**, President and Chief Executive Officer, Better Medicare Alliance; Former EVP, Advocacy and Operations, AHIP; Former Chief of Staff, Secretary Donna E. Shalala, US Department of Health and Human Services, Washington, DC

1:30 pm



CMS Medicare Advantage Keynote Address

**Meena Seshamani, MD, PhD**, Director, Center for Medicare, Centers for Medicare & Medicaid Services; Former Vice President, Clinical Care Transformation, MedStar Health, Washington, DC

2:00 pm



Update on Recent CMS Medicare Advantage Proposed Rules, Regulations and Initiatives

**Doug Jacobs, MD, MPH**, Chief Transformation Officer, Center for Medicare, Centers for Medicare & Medicaid Services; Former Chief Medical Officer and Chief Innovation Officer, Pennsylvania Department of Human Services, Washington, DC



**Molly T. Turco, MPH**, Senior Advisor, Center for Medicare, Centers for Medicare & Medicaid Services, Washington, DC

2:45 PM



Overview of the 2024 Rate Notice

**Philip Nelson, FSA, CERA, MAAA**, Senior Actuarial Manager, Milliman, Milwaukee, WI



**Douglas Rodrigues, ASA, MAAA**, Associate Actuary, Milliman, Brookfield, WI

3:15 pm



Sustaining and Strengthening Medicare Advantage

**Mary Beth Donahue, MPP**, President and Chief Executive Officer, Better Medicare Alliance; Former EVP, Advocacy and Operations, AHIP; Former Chief of Staff, Secretary Donna E. Shalala, US Department of Health and Human Services, Washington, DC

3:45 pm



Fireside Chat: A Perspective on the Role of Medicare Advantage and Value-based Care

**Donald M. Berwick, MD, MPP, FRCP**, Lecturer of Health Care Policy, Department of Health Care Policy, Harvard Medical School; President Emeritus and Senior Fellow, Institute for Healthcare Improvement; Former Administrator, Centers for Medicare & Medicaid Services, Newton Centre, MA



**Richard J. Gilfillan, MD, MBA**, Former CEO and President, Trinity Health; Former Director, Centers for Medicare and Medicaid Innovation, Washington, DC



Interviewed by:

**Susan Dentzer**, President and Chief Executive Officer, America's Physician Groups; Former Editor in Chief, Health Affairs; Former Health Correspondent, PBS NewsHour, Washington, DC

All times are EDT.

**4:15 pm Fireside Chat: A Perspective on the Role of Medicare Advantage and Value-based Care**



**George Halvorson**, *Chair and CEO, Institute for InterGroup Understanding; Former Chairman and CEO, Kaiser Permanente; Former CEO, HealthPartners; Former Chair, American Association of Health Insurance Plans and International Federation of Health Plans, Sausalito, CA*



**Interviewed by:**  
**Don Crane, JD**, *Former President & CEO, America's Physician Groups; Co-producer Primary Care Transformation Summit and Medicare Advantage Summit, Los Angeles, CA*

**4:45 pm Before Rushing to Criticize Medicare Advantage, Let's Take a Close Look at the Alternative**



**Sachin H. Jain, MD, MBA**, *President and CEO, SCAN Group & Health Plan; Adjunct Professor of Medicine, Stanford University School of Medicine, Los Angeles, CA*

**5:15 pm DAY I ADJOURNMENT**

## WEDNESDAY, APRIL 12, 2023

### DAY II MORNING MINI SUMMITS MINI SUMMITS GROUP IV 10:00 am – 10:50 am

*(Concurrent sessions. All will be available on the Summit video archive at the end of the day broadcast.)*

**Mini Summit 13: Risk Adjustment: It's Time For Reform**

**10:00 am Introduction, Discussion and Q&A**

**Gary E. Bacher, MPA, JD**, *Chief of Strategy, Policy, and Legal Affairs, Capital Caring Health; Former CMMI Chief Strategy Officer, Washington, DC*

**Adam S. Boehler**, *Chief Executive Officer, Rubicon Founders; Former CEO, US International, Development Finance Corporation; Former Senior Advisor for Value-Based Transformation and Innovation, HHS; Former CMS Deputy Administrator; Former CMMI Director, Nashville, TN*

**Aneesh Chopra, MPP**, *President, CareJourney; Co-Founder, Hunch Analytics; Former First US Chief Technology Officer, Arlington, VA*

**Mini Summit 14: MA Provider Case Study: A Fireside Chat with Mark Mantei, MHSA, Chief Executive Officer, Vancouver Clinic: Medicare Advantage: Innovations in Physician Group and MA Plan Collaboration**

**10:00 am Introduction, Discussion and Q&A**

**Mark Mantei, MHSA**, *Chief Executive Officer, Vancouver Clinic; Former Chief Operating Officer, Everett Clinic, Vancouver, WA*

**Interviewed by:**  
**Bart Asner, MD**, *Former President, OptumCare Southern California; Former Chair, America's Physician Groups, Los Angeles, CA*

**Mini Summit 15: The Impact of the New Marketing Regulations on Broker Operations**

**10:00 am Introduction, Discussion and Q&A**

**Marcy Buckner, JD**, *Senior Vice President of Government Affairs, National Association of Benefits and Insurance Professionals, Washington, DC*

**Mini Summit 16: The Growth of Dual Eligible Special Needs Plans**

**10:00 am Introduction, Discussion and Q&A**

**Cheryl Phillips, MD**, *President and Chief Executive Officer, SNP Alliance; Past President and Board Chair, American Geriatrics Society, Washington, DC*

**10:50 am Transition Break**

### MINI SUMMIT GROUP V 10:55 am – 11:45 am

*(Concurrent sessions. All will be available on the Summit video archive at the end of the day broadcast.)*

**Mini Summit 17: The Group Medicare Option: Why Are More Large Employers Turning to MA for Retiree Health Solutions?**

**10:55 am Introductions, Discussion and Q&A**

**Rick Frommeyer**, *Vice President of Group Medicare and Head, Group Retiree Solutions, Aetna; Former SVP, Government, Education and Labor Markets, UnitedHealth Group, St Paul, MN*

**Emma Hoo**, *Director of Value-Based Purchasing, Purchaser Business Group on Health, San Francisco, CA*

**Mini Summit 18: MA Plan Case Study: A Fireside Chat with Brandon Cuevas, Chief Growth Officer, Employer & Individual, UnitedHealthcare**

**10:55 am Introductions, Discussion and Q&A**

**Brandon Cuevas**, *Chief Growth Officer, Employer & Individual, And Former Chief Executive Officer, West Region UnitedHealthcare, Los Angeles, CA*

**Interviewed by:**  
**Don Crane, JD**, *Former President & CEO, America's Physician Groups; Co-producer Primary Care Transformation Summit and Medicare Advantage Summit, Los Angeles, CA*

**Mini Summit 19: How Are Independent Practices Innovating to Successfully Care for the Growing Medicare Advantage Population?**

**10:55 am Introductions, Discussion and Q&A**

**Steven Abramson**, *Senior Vice President, Chief Market & Payor Relations Officer, UpStream Health, Dallas, TX*

**Steve Neorr, MBA**, *Chief Operating Officer, Upstream Health, Raleigh, NC*

**Angelo Sinopoli, MD**, *Chief Network Officer, UpStream; Former System EVP & Chief Clinical Officer, Prisma Health, Greenville, SC*

**John Supra, MS**, *Chief Data and Analytics Officer, UpStream Health; Former Deputy Director & Chief Information Officer, SC Department of Health and Human Services, Greenville, SC*

**Valinda Rutledge, MBA**, *Chief Corporate Affairs Officer, UpStream Health; Former Executive Vice President of Federal Affairs, America's Physician Groups; Former Group Director, CMS Patient Care Model Group & BPCI Lead, Washington, DC (Moderator)*

**Mini Summit 20: The Implications of Medicare Advantage Marketing Regulation on Downstream Providers**

**10:55 am Introductions, Discussion and Q&A**

**Nicole Jobe, JD, LL.M**, *Partner, Thompson Coburn LLP; Former General Counsel, Benchmark Healthcare Management, LLC, St Louis, MO*

**11:45 am Transition Break**

All times are EDT.

## MINI SUMMIT GROUP VI 11:50 am – 12:40 pm

(Concurrent sessions. All will be available on the Summit video archive at the end of the day broadcast.)

### Mini Summit 21: Why HCC Coding is Critical to Medicare Advantage Care Management

11:50 am Introductions, Discussion and Q&A

**Ravi Hundal, MD**, Chief Financial Officer and Executive Vice President of Clinical Integration, Interim Chair of Population Health, John Muir Medical Group, Pleasant Hill, CA

**Deeling L. Teng, MD**, Senior Medical Director, Greater Newport Physicians; Former Medical Director, UnitedHealthcare, Fountain Valley, CA

Interviewed by:

**Don Crane, JD**, Former President & CEO, America's Physician Groups; Co-producer Primary Care Transformation Summit and Medicare Advantage Summit, Los Angeles, CA

### Mini Summit 22: A Fireside Chat with Clive Fields, MD, Co-founder and Chief Medical Officer, VillageMD: On the Road to Value — Clinical and Economic Alignment between Primary and Specialty Physicians

11:50 am Introductions, Discussion and Q&A

**Clive Fields, MD**, Co-founder and Chief Medical Officer, VillageMD, Houston, TX

Interviewed by:

**Jerry Penso, MD, MBA**, President and Chief Executive Officer, American Medical Group Association; Former Medical Director, Continuum of Care, Sharp Healthcare, Alexandria, VA

### Mini Summit 23: Virtual Care: Your Secret Weapon for Happy Members and Improved MA Star Ratings

11:50 am Introductions, Discussion and Q&A

**Hunter Sinclair, MBA**, Vice President, Solution Strategy for Government Markets, Teladoc Health; Former Senior Director, Medicare Advantage, Oscar Health; Former VP, Value-Based Care Consulting, Optum, Memphis, TN

### Mini Summit 24: Encouraging Physician Uptake of Z-Codes to Document Non-Medical Barriers to Better Health

11:50 am Introductions, Discussion and Q&A

**Dianne Munevar, MPP**, Vice President, Health Care Strategy, NORC, University of Chicago; Former Director Of Innovation, Blue Cross Blue Shield Association, Chicago, IL

### Mini Summit 25: MA Provider Case Study: A Fireside Chat with Chris Wing, CEO, Alpine Physicians: Restoring the Joy of Physician Practice in Medicare Advantage: Specific Actions for Success

11:50 am Introductions, Discussion and Q&A

**Christopher P. Wing**, Chief Executive Officer, Alpine Physician Partners, LLC; Former CEO, SCAN Health Plan; Former National COO, HealthCare Partners Medical Group, Los Angeles, CA

Interviewed by:

**Don Crane, JD**, Former President & CEO, America's Physician Groups; Co-producer Primary Care Transformation Summit and Medicare Advantage Summit, Los Angeles, CA

12:40 pm Break

## DAY II PLENARY SESSION: CLINICAL AND OPERATIONAL INNOVATION

1:00 pm



Co-chair Welcome and Introductions

**Susan Dentzer**, President and Chief Executive Officer, America's Physician Groups; Former Editor in Chief, Health Affairs; Former Health Correspondent, PBS NewsHour, Washington, DC

1:15 pm



Keynote Address: The Role of the CMS Innovation Center in Driving Medicare Advantage Innovation

**Ellen Lukens, MPH**, Deputy Director, Center for Medicare & Medicaid Innovation, Centers for Medicare & Medicaid Services, Washington, DC

Interviewed by:

**Valinda Rutledge, MBA**, Chief Corporate Affairs Officer, UpStream Health; Former Executive Vice President of Federal Affairs, America's Physician Groups; Former Group Director, CMS Patient Care Model Group & BPCI Lead, Washington, DC

1:45 pm



MedPAC Keynote Fireside Chat

**Michael Chernew, PhD**, Chair, MedPAC; Leonard D. Schaeffer Professor of Health Care Policy, Department of Health Care Policy, and Director, Healthcare Markets and Regulation Lab, Harvard Medical School, Cambridge, MA

Interviewed by:

**Susan Dentzer**, President and Chief Executive Officer, America's Physician Groups; Former Editor in Chief, Health Affairs; Former Health Correspondent, PBS NewsHour, Washington, DC

2:15 pm



Health Plan Keynote

**George Renaudin, JD, MPP**, President, Medicare, Humana; Former Senior Vice President, Ochsner Health Plan, Franklin, TN

Interviewed by:

**Don Crane, JD**, Former President & CEO, America's Physician Groups; Co-producer Primary Care Transformation Summit and Medicare Advantage Summit, Los Angeles, CA

2:45 pm

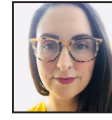


CMS Innovation Center Medicare Advantage VBID-Model Case Studies

**Shantanu Agrawal, MD, DPhil**, Chief Health Officer, Elevance Health; Associate Professor, Emergency Medicine, School of Medicine and Health Sciences, George Washington University; Former CMS Deputy Administrator, Washington, DC



**Alex Billioux, MD, DPhil**, VP of Social Determinants of Health, UnitedHealthcare Government; Former Assistant Secretary of Health, Louisiana Department of Health; Former Director, Division of Population Health Incentives and Infrastructure, CMMI, Baltimore, MD



**Leah Brucchieri**, Director, Medicare Growth Innovation, Humana, Louisville, KY



**Sibel Ozcelik, MA**, Deputy Director, Division of Health Plan Innovation, CMS Innovation Center, Centers for Medicare & Medicaid Services, Washington, DC



**Lauren Flynn Kelly**, Managing Editor, AIS Health, an MMIT company; Editor, Radar on Medicare Advantage, Washington, DC (Moderator)

All times are EDT.

**3:30 pm** **Improving Outcomes for Medicare Advantage Patients with Diabetes**



**Benjamin Kornitzer, MD**, Chief Medical Officer, *agilon health*; Former Chief Medical Officer, Mount Sinai Health System; Former Chief Operating Officer, Chief Strategy Officer; Balance ACO, Boston, MA



**Interviewed by:**  
**Don Crane, JD**, Former President & CEO, *America's Physician Groups*; Co-producer *Primary Care Transformation Summit* and *Medicare Advantage Summit*, Los Angeles, CA

**4:00 pm** **Comparison of Care Quality Metrics in 2-Sided Risk Medicare Advantage vs Fee-for-Service Medicare Programs**



**Ken Cohen, MD**, Executive Director of Translational Research, *Optum Care*; Former Chief Medical Officer, *New West Physicians*, Golden, CO



**Patrick H. Conway, MD, MSc**, Chief Executive Officer, *Care Solutions*, *Optum Health*; Former Chief Medical Officer, Deputy Administrator, and Director, *CMS Innovation Center*, Centers for Medicare and Medicaid Services, US Department of Health and Human Services, Boston, MA



**Interviewed by:**  
**Don Crane, JD**, Former President & CEO, *America's Physician Groups*; Co-producer *Primary Care Transformation Summit* and *Medicare Advantage Summit*, Los Angeles, CA

**4:30 pm** **Day II Adjournment**

**Abi Sundaramoorthy, MD, MBA**, Chief Medical Officer, *Wellinks*; Associate Professor of Medicine, *University of South Florida College of Nursing*, Wesley Chapel, FL

**Caroline Pearson**, Executive Director, *Peterson Center on Healthcare*; Former Senior Vice President for *Healthcare Strategy, NORC, University of Chicago*, Chicago, IL (Moderator)

**THURSDAY, APRIL 13, 2023**

**DAY III MORNING MINI SUMMITS**

**MINI SUMMITS GROUP VII 10:00 am – 10:50 am**

(Concurrent sessions. All will be available on the Summit video archive at the end of the day broadcast.)

**Mini Summit 26: Strategic Implications: Medicare Advantage Now Chosen by the Majority of Minority and Low-Income Beneficiaries**

**10:00 am** **Introduction, Discussion and Q&A**

**Aneesh Chopra, MPP**, President, *CareJourney*; Co-Founder, *Hunch Analytics*; Former First US Chief Technology Officer, Arlington, VA

**David B. Muhlestein, PhD, JD**, Chief Research Officer, *Health Management Associates*; Visiting Policy Fellow, *Margolis Center for Health Policy, Duke University*; Visiting Fellow, *Accountable Care Learning Collaborative*, Washington, DC

**Nathan Smith, PhD**, Principal Researcher, *CareJourney*, Kaysville, UT

**Mini Summit 27: MA Provider Case Study: A Fireside Chat with June Simmons, President and Chief Executive Officer, Partners in Care Foundation: Medicare Advantage: Innovations in Social Care "Hub Work"**

**10:00 am** **Introduction, Discussion and Q&A**

**June Simmons**, President and Chief Executive Officer, *Partners in Care Foundation*; Co-founder, *Evidence-Based Leadership Council*, San Fernando, CA

**Interviewed by:**  
**Don Crane, JD**, Former President & CEO, *America's Physician Groups*; Co-producer *Primary Care Transformation Summit* and *Medicare Advantage Summit*, Los Angeles, CA

**Mini Summit 28: Meeting the Needs of Medicare Advantage Beneficiaries with Complex Health Challenges**

**10:00 am** **Introduction, Discussion and Q&A**

**Amy Flaster, MD, MBA**, Chief Medical Officer, *Concerto-Care*; Associate Physician, *Brigham and Women's Hospital*; Instructor of Medicine, *Harvard Medical School*, Boston, MA

**Ali Khan, MD, MPP, FACP**, Chief Medical Officer, *Value-Based Care Strategy*, *Oak Street Health*; Former Clinical Design Officer, *CareMore Health*; Former Director of Physician Engagement, *Iora Health*, Chicago, IL

**Mini Summit 29: The Role of States in the Regulation of Medicare Advantage Marketing**

**10:00 am** **Introduction, Discussion and Q&A**

**Tamara McCloy** (Invited), Health Plans Branch Manager, *Centers for Medicare & Medicaid Services*, North Cape May, NJ

**Frank Pyle**, State Fraud Investigator, *State of Delaware*; Vice Chair, *Improper Marketing of Health Insurance Working Group*, *National Association of Insurance Commissioners*, Wilmington, DE

**Martin Swanson, JD**, Deputy Director and General Counsel, *Nebraska Department of Insurance*; Chair, *Improper Marketing of Health Insurance Working Group*, *National Association of Insurance Commissioners*, Lincoln, NB

**Tricia A. Beckmann, JD**, Director, *Faegre Drinker Consulting*; Former Special Assistant, Principal Deputy Center and Operations Director, *CCIIO, CMS*, Washington, DC (Moderator)

**10:50 am** **Transition Break**

**MINI SUMMITS GROUP VIII 10:55 am – 11:45 am**

(Concurrent sessions. All will be available on the Summit video archive at the end of the day broadcast.)

**Mini Summit 30: Medicare Advantage Outperforms Fee-for-Service on Certain Diabetes Outcomes**

**10:55 am** **Introductions, Discussion and Q&A**

**A. Mark Fendrick, MD**, Professor, *Department of Health Management and Policy*; Director, *Center for Value-Based Insurance Design*, *University of Michigan*, Ann Arbor, MI

**Thomas Kornfield, MPP**, Senior Consultant, *Avalere Health*; Former Vice President, *America's Health Insurance Plans*; Former Director, *Division of Payment Systems, Medicare Plan Payment Group*, *Centers for Medicare & Medicaid Services*, Rockville, MD



All times are EDT.

### Mini Summit 31: MA Health Plan Case Study: A Fireside Chat with John Baackes, Chief Executive Officer, LA Care Health Plan

**10:55 am** Introductions, Discussion and Q&A  
**John Baackes**, Chief Executive Officer, LA Care Health Plan, Los Angeles, CA  
**Interviewed by:**  
**Don Crane, JD**, Former President & CEO, America's Physician Groups; Co-producer Primary Care Transformation Summit and Medicare Advantage Summit, Los Angeles, CA

### Mini Summit 32: How to Make Field Marketing Organizations (FMO) Audit Proof

**10:55 am** Introductions, Discussion and Q&A  
**Justin Bever**, President, RB Insurance Group, LLC; Vice President, Medicare Solutions, Association Members Benefits Advisors; Founder, Cosurance Consultants, LLC, Carbondale, CO

### Mini Summit 33: Overview of the new Provider Directory Accuracy and Network Adequacy Requirements

**10:55 am** Introductions, Discussion and Q&A  
**Steve Arbaugh**, Principal and Chief Executive Officer, ATTAC Consulting Group (ACG); Former EVP, Gorman Health Group, Ann Arbor, MI

**11:45 am** Transition Break

## MINI SUMMIT GROUP IX 11:50 am – 12:40 pm

(Concurrent sessions. All will be available on the Summit video archive at the end of the day broadcast.)

### Mini Summit 34: Lessons Learned from Insurtech's Challenges in Medicare Advantage Implementation: Oscar Health, Clover Health and Bright Health

**11:50 am** Introductions, Discussion and Q&A  
**Kaenan Hertz, PhD**, Chief Insurance Officer and Co-founder, Insurtech Advisors, New York, NY  
**Ari Gottlieb**, Principal, A2 Strategy; Former Director, Health Services & Payer Strategy, PwC, Chicago, IL

### Mini Summit 35: Addenda, One-Way Chart Reviews and Other Trends in Upcoding Lawsuits

**11:50 am** Introductions, Discussion and Q&A  
**Jesse A. Witten, JD**, Partner, Faegre Drinker Biddle & Reath LLP; Former Deputy Associate Attorney General, and Chief, Civil Fraud Section, Office of Consumer Litigation and Environment and Natural Resources Division, US Department of Justice, Washington, DC

### Mini Summit 36: MA Provider Case Study: Chris Chen, MD, Chief Executive Officer, ChenMed: Proactive Outreach is the Key to Treating Seniors in MA

**11:50 am** Introductions, Discussion and Q&A  
**Chris Chen, MD**, Chief Executive Officer, ChenMed, Miami, FL  
**Interviewed by:**  
**Bill Gil, MBA**, Former Vice President & Chief Executive Officer, Providence Southern California Medical Foundations, Los Angeles, CA

### Mini Summit 37:

**11:50 am** Introductions, Discussion and Q&A

**12:40 pm** Break

## DAY III PLENARY SESSION: LAW, REGULATION AND COMPLIANCE

**1:00 pm** Co-chair Welcome and Introductions



**Susan Dentzer**, President and Chief Executive Officer, America's Physician Groups; Former Editor in Chief, Health Affairs; Former Health Correspondent, PBS NewsHour, Washington, DC

**1:15 pm**



**Government Oversight and Enforcement with regard to the Medicare Advantage Program**

**David M. Coriell, JD**, Assistant US Attorney, Western District of New York, US Department of Justice, Buffalo, NY



**Carolyn Kapustij, MPH**, Senior Advisor for Managed Care, Office of Inspector General, US Department of Health and Human Services, Washington DC

**1:45 pm**



**Medicare Advantage Whistleblower Litigation**

**Mary A. Inman, JD**, Partner, Constantine Cannon LLP; Lead Whistleblower Counsel, Multiple Medicare Advantage Risk Adjustment Fraud Litigation, San Francisco, CA and London, UK

**2:15 pm**



**Implications of the Inflation Reduction Act to the Medicare Advantage Program and Participants**

**Tricia A. Beckmann, JD**, Director, Faegre Drinker Consulting; Former Special Assistant, Principal Deputy Center and Operations Director, CCHIO, CMS, Washington, DC

**2:45 pm**



**Risk Adjustment and the Potential Impact of the Final RADV Rule**

**Sean Creighton, MSc**, Managing Director, Avalere; Former VP Federal Policy, Humana; Former Deputy Group Director, Payment Policy, and Financial Management Group, Centers for Medicare & Medicaid Services, Washington, DC

**3:15 pm**



**Responding to RADV, OIG Audits, the Overpayment Rule and Other Tools for Enforcing Risk Adjustment Requirements**

**John Kelly, JD**, Partner and Chair, Healthcare Industry Practice, Barnes & Thornburg; Former Assistant Chief for Health Care Fraud, Criminal Division, Fraud Section, US Department of Justice, Washington, DC

**3:45 pm**



**New Medicare Marketing Requirements and Best Practices for Compliance**

**Helaine Fingold, JD**, Partner, Epstein Becker & Green, PC; Former Acting Director, Rates & Benefits Branch, Plan Management Policy & Operations Group, CCHIO, Centers for Medicare & Medicaid Services; Former General Counsel, MedPAC, Baltimore, MD

**4:15 pm**

**Prior Authorization Update**

**4:45 pm**

**Day III Adjournment**

**FRIDAY, APRIL 14, 2023**

**CLOSING PLENARY SESSION:  
POLITICS, POLICY AND THE FUTURE**

**10:00 am Co-chair Welcome and Introductions**

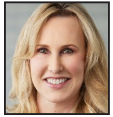


**J. Nwando Olayiwola, MD, MPH, FAAFP**, Chief Health Equity Officer and Senior Vice President, Humana; Adjunct Professor, The Ohio State University College of Medicine & College of Public Health, Columbus, OH

**10:15 am Health Plan Medicare Advantage Innovation Roundtable**



**Jay M. Gellert**, Former Chief Executive Officer and President, Health Net, Inc.; Former President and COO, Bay Pacific Health Corporation; Former SVP and COO, California Healthcare System, San Francisco, CA



**Pam Kehaly**, President and Chief Executive Officer, Blue Cross Blue Shield of Arizona; Former President, Anthem West Region & Specialty Business; Former President, National Accounts, Aetna, a CVS Health Company, Phoenix, AZ



**Don Crane, JD**, Former President & CEO, America's Physician Groups; Co-producer Primary Care Transformation Summit and Medicare Advantage Summit, Los Angeles, CA (Moderator)

**11:00 am The Role of Medicare Advantage in Advancing Health Equity**



**J. Nwando Olayiwola, MD, MPH, FAAFP**, Chief Health Equity Officer and Senior Vice President, Humana; Adjunct Professor, The Ohio State University College of Medicine & College of Public Health, Columbus, OH

**11:30 am TBA**

**12:00 pm Return on Investment (ROI) on Medicare Advantage Social Determinants of Health (SDOH) Strategies**



**John Gorman**, Chair, Nightingale Partners LLC; Founder & Former Executive Chairman, Gorman Health Group; Former Assistant to the Director, Office of Managed Care, HCFA, Washington, DC

**12:30 pm Luncheon Break and Visit Exhibit Hall**

**CLOSING PLENARY SESSION CONTINUED**

**1:00 pm**



**Capitol Hill Staff Roundtable**

**Mara McDermott, JD**, Vice President, McDermott+ Consulting; Former Senior Vice President of Federal Affairs, America's Physician Groups, Washington, DC (Moderator)

**1:30 pm**



**Fireside Chat: The Politics of Medicare Advantage**

**Christopher Jennings**, Founder and President, Jennings Policy Strategies; Senior Fellow, Bipartisan Policy Center; Former Co-chair, Biden Health Committee and Advisor, Biden Transition; Former Senior Advisor for Health Policy and Coordinator of Health Reform (Obama), Washington, DC



**Dean Rosen, MA, JD**, Partner, Mehlman Consulting; Former Advisor, Senate Majority Leader William Frist (R-TN); Former Majority Counsel, House Ways and Means Health Subcommittee; Former VP Policy and GC, Health Insurance Association of America, Washington, DC



**Interviewed by:**

**Susan Dentzer**, President and Chief Executive Officer, America's Physician Groups; Former Editor in Chief, Health Affairs; Former Health Correspondent, PBS NewsHour, Washington, DC

**2:00 pm**



**The Future of Medicare Advantage**

**Ezekiel J. Emanuel, MD**, Vice Provost for Global Initiatives, Diane V.S. Levy and Robert M. Levy University Professor, Co-Director, Health Transformation Institute and Chair, Department of Medical Ethics, University of Pennsylvania; Former Special Advisor, Office of Management and Budget (Obama), Philadelphia, PA



**Sachin H. Jain, MD, MBA**, President and CEO, SCAN Group & Health Plan; Adjunct Professor of Medicine, Stanford University School of Medicine, Los Angeles, CA



**Mark McClellan, MD, PhD**, Director, Robert J Margolis Center for Health Policy and Margolis Professor of Business, Medicine and Health Policy, Duke University; Co-chair, Health Care Payment Learning and Action Network; Former CMS Administrator and FDA Commissioner Washington, DC



**Tom Priselac**, President and CEO, Cedars-Sinai Health System; Past Chair, American Hospital Association and Association of American Medical Colleges, Los Angeles, CA



**Seema Verma, MPH**, Health Policy Consultant; Board, LifeStance Health, Lumeris and Monogram Health; Former Administrator, Centers for Medicare & Medicaid Services, Carmel, IN



**Alan Weil, MA, JD**, Editor-in-Chief, Health Affairs; Former Executive Director, National Academy for State Health Policy; Former Executive Director, Colorado Department of Health Care Policy and Financing; Former Assistant General Counsel, Massachusetts Department of Medical Security, Bethesda, MD (Moderator)

**3:00 pm**

**SUMMIT ADJOURNMENT**