

# Virtual Fourth National Medicare Advantage Summit

**April 25 – 28, 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 Virtual Fourth National Medicare Advantage Summit Dates Have Been Moved to April 25 – 28 to Allow Faculty Time to Incorporate Response to the CMS Final 2024 Rate Notice into their Presentations.**

**AGENDA SUBJECT TO UPDATES AND CHANGE.  
Agenda current as of March 13, 2023.**



**MEDIA PARTNERS:**

**HealthAffairs**

**HARVARD  
health policy  
REVIEW**



# AGENDA-AT-A-GLANCE

All times listed are EDT.

## DAY I: TUESDAY, APRIL 25, 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

13: Navigating a Medicare Advantage Termination and Contracting Considerations

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 26, 2023

10 am – 10:50 am

### MINI SUMMITS GROUP IV (Concurrent Sessions)

14: Risk Adjustment: It's Time For Reform

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

16: The Impact of the New Marketing Regulations on Broker Operations

17: The Growth of Dual Eligible Special Needs Plans

10:55 am – 11:45 am

### MINI SUMMITS GROUP V (Concurrent Sessions)

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

19: MA Plan Case Study: A Fireside Chat with Brandon Cuevas, Chief Growth Officer, Employer & Individual, UnitedHealthcare

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

21: The Implications of Medicare Advantage Marketing Regulation on Downstream Providers

11:50 am – 12:40 pm

### MINI SUMMITS GROUP VI (Concurrent Sessions)

22: Why HCC Coding is Critical to Medicare Advantage Care Management

23: MA Provider Case 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

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

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

26: 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 26 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 VBIID-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 27, 2023

10 am – 10:50 am

### MINI SUMMITS GROUP VII (Concurrent Sessions)

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

28: 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”

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

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

10:55 am – 11:45 am

### MINI SUMMITS GROUP VIII (Concurrent Sessions)

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

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

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

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

11:50 am – 12:40 pm

### MINI SUMMITS GROUP IX (Concurrent Sessions)

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

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

37: 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

38: Online Medicare Sales is Growing. How Does This Impact Health Care Providers?

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 28, 2023

10 am – 3 pm

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

- Co-chair Welcome and Introductions
- Health Plan Medicare Advantage Roundtable
- The Role of Medicare Advantage in Advancing Health Equity
- A Review of Changes in Medicare Distribution (Retailers, etc.), and Why CMS Issued New Third-Party Marketing Organizations (TPMO) Rules
- 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:  
**GHC**  
Global Health Care, LLC

All times are EDT.

Agenda current as of March 13, 2023.

### TUESDAY, APRIL 25, 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

**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

**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, InnovaCare Health, New York, NY

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

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

**Brian Brown, CHIE, PAHM**, Vice President, Sales & Marketing, Presbyterian Health Plan, Albuquerque, NM

**Joyce Chan Russell, MBA**, Senior Vice President, Government Markets, Priority Health, Grand Rapids, MI

**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

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

**Rosemary Kennedy, MBA, PhD**, Chief Health Informatics Officer, Connect America; Former VP, Health Information Technology, National Quality Forum (NQF), Malvern, PA

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

## Mini Summit 13: Navigating a Medicare Advantage Termination and Contracting Considerations

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

**David Axene, MS**, President/Managing Partner, Axene Health Partners, Celina, TX

**Steve Davis, MS**, AVP Managed Care & Payer Strategy, Ardent Health Services, McKinney, TX

### 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



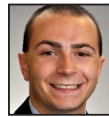
**Doug Jacobs, MD, MPH**, Chief Transformation Officer, Center for Medicare, Centers for Medicare & Medicaid Services; Former Chief Medical Officer and Chief Innovation Officer, Pennsylvania Department of Human Services, Washington, DC



**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 26, 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 14: 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 15: 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 16: 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 17: 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 18: 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 19: 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 20: 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 21: 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**



## 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 22: 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 23: 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 24: 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 25: 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 26: 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

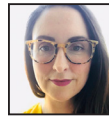
#### CMS Innovation Center Medicare Advantage VBID-Model Case Studies



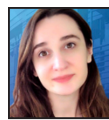
**Shantanu Agrawal, MD, DPhil**, Chief Health Officer, Elevance Health; Associate Professor, Emergency Medicine, School of Medicine and Health Sciences, George Washington University; Former CMS Deputy Administrator, Washington, DC



**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

## THURSDAY, APRIL 27, 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 27: 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 28: 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 29: 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

**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)

#### Mini Summit 30: The Role of States in the Regulation of Medicare Advantage Marketing

10:00 am Introduction, Discussion and Q&A

**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 31: 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

### Mini Summit 32: 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 33: 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 34: 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 35: 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 36: 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 37: 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 38: Online Medicare Sales is Growing. How Does This Impact Health Care Providers?

11:50 am Introductions, Discussion and Q&A

**Benjamin Brooks**, Chief Technology and Operations Officer, MedicareOnDemand, Indianapolis, IN

**Chuck Chaput**, Chief Operations and Compliance Officer, MedicareCompareUSA and MCUSA Consulting, Lakewood Ranch, FL

12:40 pm Break and Visit Exhibit Hall

## 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, CCIIO, 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, CCIIO, Centers for Medicare & Medicaid Services; Former General Counsel, MedPAC, Baltimore, MD*

4:15 pm



### Prior Authorization Update

**Janice Bakos, MBA** (Invited), *Project Manager, Aetna; Co-Chair, WEDI Prior Authorization Working Group, Hawley, PA*



**Heather McComas, MA, PharmD**, *Director, Administrative Simplification Initiatives, American Medical Association; Co-Chair, WEDI Prior Authorization Working Group, Chicago, IL*



**Genevieve Morris, MA**, *Senior Director, Interoperability Strategy, Change Healthcare; Former Chief Health Information Officer, Veterans Administration; Former Principal Deputy National Coordinator, Office of the National Coordinator for Health Information Technology, Pooler, GA*

4:45 pm

**Robert M. Tennant, MA**, *Vice President, Federal Affairs, Workgroup for Electronic Data Interchange (WEDI); Former Director, HIT Policy, Medical Group Management Association, Washington, DC (Moderator)*

### Day III Adjournment

## FRIDAY, APRIL 28, 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 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



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



**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

#### A Review of Changes in Medicare Distribution (Retailers, etc.), and Why CMS Issued New Third-Party Marketing Organizations (TPMO) Rules



**Nicole J. Aiken-Shaban, JD**, Partner, Reed Smith, Philadelphia, PA



**Tyler Rees**, Chief Executive Officer, Innovative Financial Solutions, Wilmington, NC

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