


2019  
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Conference 

**HOW COLLABORATION CAN HELP BUILD A SUCCESSFUL RELATIONSHIP WITH YOUR CMS ACCOUNT MANAGER**

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**HOW COLLABORATION CAN HELP BUILD A SUCCESSFUL RELATIONSHIP WITH YOUR CMS ACCOUNT MANAGER**

Kristi Sugarman Coats, CMS Account Manager

- CMS San Francisco
- Employed with CMS since 2007
- Account Manager for MMPs and D-SNPs

Fun Fact: In 2019, one-third of all Medicare beneficiaries are enrolled in Medicare Advantage plans.

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**HOW COLLABORATION CAN HELP BUILD A SUCCESSFUL RELATIONSHIP WITH YOUR CMS ACCOUNT MANAGER**

Grace Materon, CMS Account Manager

- CMS San Francisco
- Employed with CMS since 2009
- Account Manager for Medicare plans, including D-SNPs

Fun Fact: Enrollment in Medicare Advantage has nearly doubled over the past decade.

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Charlie Chaleunsky, CMS Account Manager

- CMS San Francisco
- Employed with CMS since 2009
- Account Manager for SCAN Health Plan, Blue Shield of CA and L.A. Care.

Fun Fact: Half of Medicare Advantage enrollees pay no premium (other than the Part B premium) in 2019.

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**HOW COLLABORATION CAN HELP BUILD A SUCCESSFUL RELATIONSHIP WITH YOUR CMS ACCOUNT MANAGER**

Jennifer Daskal, CMS Account Manager

- CMS San Francisco
- Employed with CMS since 2006
- Account Manager since 2009 for PACE, MMP and D-SNP plans

Fun Fact: The average length of time a CMS Account Manager in San Francisco has worked for CMS is 12.6 years.

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**HOW COLLABORATION CAN HELP BUILD A SUCCESSFUL RELATIONSHIP WITH YOUR CMS ACCOUNT MANAGER**

Gilbert Lara, CMS Account Manager for United Healthcare

- CMS San Francisco
- Joined CMS in 2008
- Account Manager since 2012

Fun Fact: San Francisco was ranked as the #1 healthiest place to live in America in 2019.

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**HOW COLLABORATION CAN HELP BUILD A SUCCESSFUL RELATIONSHIP WITH YOUR CMS ACCOUNT MANAGER**

Annie Hsu Shieh, Senior Compliance Counsel  
 Central Health Plan of California

- Licensed in 2004
- Currently has 43,000 enrollees
- Offices in Diamond Bar, California

Fun Fact: The City of Diamond Bar is named after the "diamond over a bar" branding iron registered in 1918 by ranch owner Frederick E. Lewis

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- Robert Alfano, Director of Compliance Services, Prime Therapeutics, LLC
- Prime manages pharmacy benefits for health plans, employers and government programs, including Medicare and Medicaid.
- Prime serves 22 Blue plans and 28 million members. Serves 2.5 million members covered through the federal and state exchanges.

Fun Fact: Based in Minnesota. Minnesota has more miles of coastline than all of California!

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**HOW COLLABORATION CAN HELP BUILD A SUCCESSFUL RELATIONSHIP WITH YOUR CMS ACCOUNT MANAGER**

John Tanner, Medicare Compliance Officer, VP, Corporate Compliance  
 Molina Healthcare

- 44,000 MAPD/D-SNP members (over 90% D-SNP) (9 states); 58,000 MMP members (6 states)
- Other Lines of Business
  - ✓ 3 Million Medicaid members (13 states and Puerto Rico)
  - ✓ 300 K Exchange members (9 states)

Fun Fact: Molina Healthcare has seven CMS Account Managers!

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### HOW COLLABORATION CAN HELP BUILD A SUCCESSFUL RELATIONSHIP WITH YOUR CMS ACCOUNT MANAGER

Darlene Dulac, MBA, CHC, Senior Consultant  
ATTAC Consulting Group (Ann Arbor, MI)  
ATTAC ("Attic") provides expertise and support in health plan strategy, operations and process controls, provider networks, governmental compliance and audit, clinically integrated networks, incentive and risk models, population health, and more.

Specializes in Medicare Advantage, Part D, MMPs, Medicaid, ACA / Exchange

Fun Fact: 158 Parks in Ann Arbor, Michigan

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### HOW COLLABORATION CAN HELP BUILD A SUCCESSFUL RELATIONSHIP WITH YOUR CMS ACCOUNT MANAGER

**Polling Question #1:** Which of the following CMS San Francisco states has the greatest Medicare Advantage market penetration rate?

- A California
- B Arizona
- C Nevada
- D Hawaii

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### HOW COLLABORATION CAN HELP BUILD A SUCCESSFUL RELATIONSHIP WITH YOUR CMS ACCOUNT MANAGER



Medicare Advantage Market Penetration Rate by State

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## HOW COLLABORATION CAN HELP BUILD A SUCCESSFUL RELATIONSHIP WITH YOUR CMS ACCOUNT MANAGER

### CMS San Francisco Facts

- States and Territories
- Account Manager Assignments
- Medicare Advantage Facts

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## NEW CMS OFFICE OF PROGRAM OPERATIONS AND LOCAL ENGAGEMENT

**OFFICE OF PROGRAM OPERATIONS AND LOCAL ENGAGEMENT (OPOLE)**  
DIRECTOR (Acting) Nancy O'Connor

<b>DRUG &amp; HEALTH PLAN OPERATIONS (DHPO)</b> DEPUTY DIRECTOR Nancy O'Connor	<b>INNOVATION &amp; FINANCIAL MANAGEMENT (IFM)</b> DEPUTY DIRECTOR Greg Gill	<b>LOCAL ENGAGEMENT &amp; ADMINISTRATION (LEA)</b> DEPUTY DIRECTOR John Hammarlund	<b>STRATEGY &amp; BUSINESS OPERATIONS (SBO)</b> DEPUTY DIRECTOR Ray Hurd
Boston & New York DHPO Group	Boston & New York IFM Group	Boston Regional Administrator	Dallas Regional Administrator
Philadelphia & Atlanta DHPO Group	Philadelphia & Atlanta IFM Group	New York Regional Administrator	Kansas City Regional Administrator
Chicago & Kansas City DHPO Group	Chicago & Kansas City IFM Group	Philadelphia Regional Administrator	Denver Regional Administrator
Dallas & Denver DHPO Group	Dallas & Denver IFM Group	Atlanta Regional Administrator	San Francisco Regional Administrator
San Francisco & Seattle DHPO Group	San Francisco & Seattle IFM Group	Chicago Regional Administrator	Seattle Regional Administrator

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## OFFICE OF PROGRAM OPERATIONS AND LOCAL ENGAGEMENT / DRUG & HEALTH PLAN OPERATIONS

**San Francisco & Seattle Drug and Health Plan Operations**  
GROUP DIRECTOR Ann Duarte  
DEPUTY GROUP DIRECTOR Brenda Sulter

<b>SF Division of Casework Management</b> DIVISION DIRECTOR Max Wong	<b>Seattle Division of Casework Management</b> DIVISION DIRECTOR (Vacant)
<b>SF Division of Drug &amp; Health Plan Operations</b> DIVISION DIRECTOR Deanna Gee	<b>Seattle Division of Drug &amp; Health Plan Operations</b> DIVISION DIRECTOR Nyetta Patton
<b>SF Division of Special Programs and Innovation</b> DIVISION DIRECTOR Ayanna Burby-Jackson	

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HOW COLLABORATION CAN HELP BUILD A SUCCESSFUL RELATIONSHIP WITH YOUR CMS ACCOUNT MANAGER

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Who is the Account Manager?

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**Polling Question #2:** If you are an MA/MAPD Plan, do you have a direct relationship with the health plan's CMS Account Manager?

A Yes

B No

Relationship Status: it's complicated

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THE IMPORTANCE OF A SUCCESSFUL PLAN-CMS ACCOUNT MANAGER RELATIONSHIP

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### HOW COLLABORATION CAN HELP BUILD A SUCCESSFUL RELATIONSHIP WITH YOUR CMS ACCOUNT MANAGER

- Recognizing Boundaries – But Better Together
- Goal of Partnership to Serve Our Members/Beneficiaries Better
- Fulfill Regulatory Mandates
- Regulatory Success is Business Success

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### HOW COLLABORATION CAN HELP BUILD A SUCCESSFUL RELATIONSHIP WITH YOUR CMS ACCOUNT MANAGER

#### The Importance of a Successful Plan-Regulator Relationship

CMS	PLANS
<ul style="list-style-type: none"> <li>Assure Good Communications</li> <li>Partnership and Commitment</li> <li>Industry Best Practices</li> </ul>	<ul style="list-style-type: none"> <li>Clarification on Guidance</li> <li>Cohesion</li> <li>Integrity</li> </ul>

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### HOW COLLABORATION CAN HELP BUILD A SUCCESSFUL RELATIONSHIP WITH YOUR CMS ACCOUNT MANAGER

How do you rebuild a successful Plan and CMS Account Manager relationship after a significant noncompliance event, such as an CMS program audit findings related to member access to health services?

Open Communications with CMS RO Account Manager	Trust, but verify Operational Improvements	Re-create a Culture of Compliance within the Plan
Promote High-Integrity throughout the Organization	Be Member Focused	

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**HOW COLLABORATION CAN HELP BUILD A SUCCESSFUL RELATIONSHIP WITH YOUR CMS ACCOUNT MANAGER**

**Polling Question #3:** If you are an MA/MAPD Plan, how long have you worked with your current CMS Account Manager?

A	0-2 years	<input type="checkbox"/>
B	3-4 years	<input type="checkbox"/>
C	5 years or more	<input type="checkbox"/>

Relationship Status:  it's complicated

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**PUTTING IT ALL TOGETHER**

What does a successful Account Manager relationship look like today and in the future?

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**HOW COLLABORATION CAN HELP BUILD A SUCCESSFUL RELATIONSHIP WITH YOUR CMS ACCOUNT MANAGER**

What does a successful Account Manager relationship look like today and in the future?

What does a successful Account Manager relationship look like today and in the future?	Partnership	Professional
	Mutual Respect	Trust

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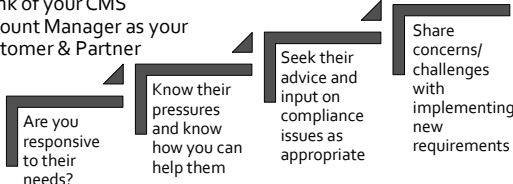
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### HOW COLLABORATION CAN HELP BUILD A SUCCESSFUL RELATIONSHIP WITH YOUR CMS ACCOUNT MANAGER

Think of your CMS Account Manager as your Customer & Partner



- Are you responsive to their needs?
- Know their pressures and know how you can help them
- Seek their advice and input on compliance issues as appropriate
- Share concerns/ challenges with implementing new requirements

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### HOW COLLABORATION CAN HELP BUILD A SUCCESSFUL RELATIONSHIP WITH YOUR CMS ACCOUNT MANAGER

Develop a communications plan/meeting cadence with your CMS Account Manager	Monthly or quarterly update meetings
	Outreach ad hoc as significant issues arise
	Organize key facts before reaching out to your Account Manager unless it is a high urgency issue that may impact CMS via CTMs or other complaint channels

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### HOW COLLABORATION CAN HELP BUILD A SUCCESSFUL RELATIONSHIP WITH YOUR CMS ACCOUNT MANAGER

• **Polling Question #4:** If you are an MA/MAPD Plan, what is the most effective way you engage with your CMS Account Manager?

A	Regularly scheduled calls	<input type="checkbox"/>
B	Ad-hoc meetings	<input type="checkbox"/>
C	In-person meetings	<input type="checkbox"/>
D	Other	<input type="checkbox"/>

Relationship Status: it's complicated

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**STRATEGIES FOR SUCCESS**

BEST PRACTICES

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**HOW COLLABORATION CAN HELP BUILD A SUCCESSFUL RELATIONSHIP WITH YOUR CMS ACCOUNT MANAGER**

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Explain your product	Get to know your AM's schedule
<b>Best Practices</b>	
How does your AM prefer to be contacted?	Establish templates/reports for regular meetings

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<b>Best Practices</b>		
Providing a courtesy "heads up" before any significant changes	Prepare impact analysis when needed. Research	CC your Account Manager on all CMS SME communications

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## HOW COLLABORATION CAN HELP BUILD A SUCCESSFUL RELATIONSHIP WITH YOUR CMS ACCOUNT MANAGER

**Best Practices:**

- Work with your AM on deadlines for Strategic Conversations or other AM inquiries
- Routine Meetings/Monthly Calls
- Don't be afraid to reach out if you're having challenges and/or need technical assistance

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## HOW COLLABORATION CAN HELP BUILD A SUCCESSFUL RELATIONSHIP WITH YOUR CMS ACCOUNT MANAGER

**Polling Question #5:** If you are an MA/MAPD Plan, how would you rate the health of your relationship with your CMS Account Manager?

- A Healthy & Fit
- B In Training
- C Out of Shape
- D In Need of a Check-up



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## HOW COLLABORATION CAN HELP BUILD A SUCCESSFUL RELATIONSHIP WITH YOUR CMS ACCOUNT MANAGER

QUESTIONS?

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