



## 2010 IOC Agenda

### Sunday, July 11

2:00 - 5:00 Registration  
6:00 - 8:00 Welcome Reception

### Monday, July 12

6:30 - 8:00 Breakfast  
8:00 - 9:45 General Session  
9:45 - 10:00 Break  
10:00 - 4:00 Caucus Time  
6:00 - 10:00 Dinner Event: USS *Midway*

### Tuesday, July 13

6:00 - 7:00 Fitness Boot Camp  
6:30 - 8:00 Breakfast  
8:00 - 9:30 Integrated Caucus Session  
9:30 - 9:45 Break  
9:45 - 12:30 Caucus Time  
Free Afternoon

### Wednesday, July 14

6:30 - 8:00 Breakfast  
8:00 - 10:00 Caucus Time  
10:00 - 10:15 Break  
10:15 - 11:45 General Session



# Audit & Compliance Caucus

Chair: Brian Schatz, Director of Audit Services and Compliance Officer, BCBS Kansas City

## Monday, July 12

10:00 - 10:20	Welcome/Introductions/Caucus Goals
10:20 - Noon	Plan Updates <ul style="list-style-type: none"> <li>• Audit &amp; Compliance Organization Overviews</li> <li>• Leading Practices</li> <li>• Current/Future Challenges</li> </ul>
Noon - 1:00	Lunch
1:00 - 2:00	Roundtable Discussion: Plan Update "Deep Dives" <ul style="list-style-type: none"> <li>• Auditing and Monitoring the Extended Enterprise (vendors/partners)</li> <li>• Model Audit Rule: Minimizing Impact, Maximizing Value</li> <li>• Quality Assurance Reviews, Continuous Audit Process Improvement</li> <li>• Creative Staff Incentives and Recognition</li> <li>• Training Strategies: Doing More with Less</li> </ul>
2:00 - 2:15	Break
2:15 - 3:45	Roundtable Discussion (continued)
3:45 - 4:00	Evaluations

## Tuesday, July 13

9:45 - 10:00	Review Roundtable Topic Priorities and Caucus Goals
10:00 - 12:15	Roundtable Discussion: Transformational Audit & Compliance <ul style="list-style-type: none"> <li>• Measuring Value: Metrics and Communication with Management and the Audit Committee</li> <li>• Client-centric Auditing: "No Surprises" Reporting Strategies</li> <li>• Assessing Corporate and IT Governance</li> <li>• Technology: Realizing Opportunities and Managing Risks</li> <li>• Getting a Seat at the Table: Aligning with Organizational Strategy</li> </ul>
12:15 - 12:30	Evaluations

## Wednesday, July 14

8:00 - 9:30	Review Caucus Goals/Parking Lot Discussion Items
9:30 - 9:45	Discuss 2011 Caucus
9:45 - 10:00	Evaluations



## Claims Caucus

Chair: Lesley DeRoche, Manager, Boeing Claims, Regence BS

### Monday, July 12

10:00 - 10:15	Welcome/Introductions
10:15 - 10:30	Review Agenda; Create Hot Topics List
10:30 - 11:30	Benchmarking Data: Plans review data previously submitted on claim receipts, processing timeliness, quality, first-pass rates, and other benchmarking targets. Discuss success and challenges for performance metrics.
11:30 - Noon	Lunch
Noon - 1:00	Plan Updates/Small Group Breakouts: Discussion surrounding what has transpired over the last year. Plans are requested to submit top 3 successes and top 3 challenges for the past year. Reconvene as larger group for presentation and discussion on topics.
1:00 - 2:00	Presentation: Canadian Health Care System
2:00 - 2:15	Break
2:15 - 3:15	Roundtable Discussion <ul style="list-style-type: none"> <li>• Cost Reduction Initiatives</li> <li>• EMC Submission Strategies</li> <li>• Paperless Provider and Member Reports</li> <li>• ICD 10</li> </ul>
3:15 - 3:45	BlueCard Update by Craig Mudge, Manager, Plan Relations, BCBSA
3:45 - 4:00	Evaluations /Giveaways

### Tuesday, July 13

9:45 - 10:45	Caucus: Joint Session with Customer Service SWAT: Sustainability Wellness Action Team Presentation by Dan Medin, Director, Corporate Sustainability and Wellness, The Regence Group: An objective to establish a culture within Regence where we can make choices that are good for the health of our community, our members and our employees. A culture where we bring together social, environmental and economic perspectives to guide our decisions, plan for the future, and create value for our members.
10:45 - 11:00	Break



11:00 - 12:15

Roundtable Discussion

- Workflow Management
- Credit Balance Recoveries
- Tracking Tool for Overpayments
- Open Connect
- Government Payment Requests
- Hot Topics

12:15 - 12:30

Evaluations/Giveaways

**Wednesday, July 14**

8:00 - 9:15

MTM: 2011 and Beyond

9:15 - 9:45

Planning for 2011

9:45 - 10:00

Evaluations/Giveaways



## Customer Service Caucus

Chair: Lesli Dillon, Manager, Boeing Customer Service, Regence BS

### Monday, July 12

10:00 - 10:15	Welcome/Introductions
10:15 - 11:30	Plan Updates: 2010 and Beyond
11:30 - 1:00	Working Lunch/Review Agenda
1:00 - 2:00	Roundtable Discussion <ul style="list-style-type: none"> <li>• Health Care Reform</li> <li>• Self-service: QA</li> <li>• VRU/IVR Portal</li> <li>• Pandemic Business Continuity</li> <li>• Cost-Cutting Measures</li> <li>• New Technology in a Recession: Leveraging Resources Between Plans</li> <li>• E-Learning</li> <li>• FMLA/Employee Issues</li> <li>• Employee Satisfaction Survey</li> </ul>
2:00 - 2:15	Break
2:15 - 3:45	PAG Update by Joanne Gholston, Vice President, Customer Service, The Regence Group
3:45 - 4:00	Evaluations /Giveaways

### Tuesday, July 13

9:45 - 10:45	Joint Session with Claims SWAT: Sustainability Wellness Action Team Presentation by Dan Medin, Director, Corporate Sustainability and Wellness, The Regence Group: An objective to establish a culture within Regence where we can make choices that are good for the health of our community, our members and our employees. A culture where we bring together social, environmental and economic perspectives to guide our decisions, plan for the future, and create value for our members.
10:45 - 11:00	Break
11:00 - 11:45	Roundtable Discussion (continued from Monday)
11:45 - 12:15	FCR 2010
12:15 - 12:30	Evaluations/Giveaways

### Wednesday, July 14

8:00 - 9:45	Roundtable Discussions <ul style="list-style-type: none"> <li>• Work @ Home Update</li> <li>• Other/Wrap-up</li> <li>• Agenda Ideas for 2011</li> </ul>
9:45 - 10:00	Evaluations/Giveaways



# Finance & Accounting Caucus

Chair: Chris Manger, Controller, BCBS Montana

## Monday, July 12

10:00 - 10:15	Welcome/Introductions
10:15 - 1:00	<p>Roundtable Discussion/Working Lunch</p> <ul style="list-style-type: none"> <li>• Budgeting <ul style="list-style-type: none"> <li>• Tools</li> <li>• Frequency, level of detail</li> <li>• Static vs. rolling</li> </ul> </li> <li>• Forecasting <ul style="list-style-type: none"> <li>• Tools</li> <li>• How often performed?</li> <li>• What timeframe? Next 12 months? Next 24 months? Next 36 months?</li> </ul> </li> <li>• Role of Finance: How is your organization breaking down walls, transforming role and value of Finance in an ever-changing environment?</li> </ul>
1:00 - 1:15	Break
1:15 - 2:15	Developments in Statutory Accounting and Reporting by Joel Thompson, Partner, Eide Bailly LLC
2:15 - 2:30	Break
2:30 - 3:45	<p>Roundtable Discussion: Controlling Administrative Costs</p> <ul style="list-style-type: none"> <li>• Plan Initiatives</li> <li>• Outsourcing: Pros and cons, cost/benefit</li> <li>• Process Improvement Initiatives (Six Sigma)</li> <li>• Partnering Opportunities with Other Blues to Achieve Economies of Scale</li> <li>• Benchmarking Your Organization <ul style="list-style-type: none"> <li>• Is SEER Useful?</li> <li>• Other Benchmarks Used?</li> <li>• What's Up with the Competition?</li> </ul> </li> </ul>
3:45 - 4:00	Evaluations/Giveaways

## Tuesday, July 13

9:45 - 11:15	<p>Roundtable Discussion: Impacts of Health Reform</p> <ul style="list-style-type: none"> <li>• Financial Operating Results</li> <li>• Product Offerings/Markets Served</li> <li>• Plan Operations and Relationships Between Plans</li> <li>• Relationships with Providers and Reimbursement Contracts</li> </ul>
11:15 - 11:30	Break
11:30 - 12:15	Economic Outlook: The Markets and the Economy in 2010 and Beyond by Brian J. Sharpes, CIMA, UBS, and Kevin M. Sanchez, CIMA, CFP, UBS
12:15 - 12:30	Evaluations/Giveaways



**Wednesday, July 14**

8:00 - 9:45

Roundtable Discussion

- Recording Expenses as Claims or Administrative Costs
- Impact of Innovation and Technology on Your Company
  - Financial Impacts
  - Plan Operations
  - Payments to Providers
- Future of Health Care
  - Funding
  - Plan Benefit Designs
  - Provider Reimbursement
  - Government's Role
- Wrap Up of Any Topics Not Discussed Earlier

9:45 - 10:00

Evaluations/Giveaways



## Human Resources Caucus

Chair: Greg Wells, Vice President, Human Resources & Employee Development, BCBS Arizona

### Monday, July 12

10:00 - 10:15	Welcome/Introductions
10:15 - 11:30	Plan Highlights: Plans provided initiatives in the past 12 months and those that will start in the next 12 months; prioritize "hot topics" list.
11:30 - 1:00	<p>Working Lunch/Roundtable Health Care Reform: In keeping with the conference theme, 'Ike Mai, 'Ike Aku, Our World, Without Walls, what existing walls will be eliminated or changed as a result of health care reform? How must HR prepare for this new environment? How do HR professionals leverage our expertise to support business partners to thrive in this new environment? Suggested topics to start dialogue:</p> <ul style="list-style-type: none"> <li>• How are plans preparing and structuring themselves to respond in the post health care reform environment?</li> <li>• What cost reduction initiatives are underway with respect to benefit, compensation or other programs?</li> <li>• What best practices are in use or under consideration for severance and career transitional services?</li> <li>• What cultural adjustments are being made to align with the new operating environment?</li> <li>• What changes are being considered to performance, incentive and retention plans to continue to attract, retain and motivate staff?</li> <li>• How are internal communications programs being leveraged or enhanced to keep employees informed of impending or potential changes?</li> </ul>
1:00 - 2:00	Transition to a Performance-based Incentive Plan by Brad Schroeder, Director, Compensation, BCBS Nebraska: In 2010, BCBS Nebraska transitioned to a performance-based incentive compensation system for all employees. The previous "one size fits all" plan was replaced by multiple performance-based approaches that tie incentive awards directly to individual performance. Brad will share the background motivating the change, a detailed review of each plan, how they are being administered, and their YTD results.
2:00 - 2:15	Break
2:15 - 3:00	Benchmarking HR Metrics by Bob Young, SPHR, Director, Human Resources, BCBS Kansas
3:00 - 3:45	Roundtable Discussion: Hot Topics (continued)
3:45 - 4:00	Evaluations/Giveaways



## Tuesday, July 13

- 9:45 - 10:45 Touch-Base Performance Feedback Pilot by Ryan Kenney, Director, Human Resources, The Regence Group: Ryan will present and share the outcome of their performance feedback pilot program. The new performance review process does not follow the traditional practice of an annual review and eliminates the use of simple and generally worded labels (e.g., exceeds standards, meets standards, etc.).
- 10:45 - 11:45 Employment Law Update and "Wacky" Employment Law Cases by Joseph T. Clees, Ogletree Deakins
- 11:45 - 12:15 Hot Topics Discussion (continued from Monday)
- 12:15 - 12:30 Evaluations/Giveaways

## Wednesday, July 14

- 8:00 - 9:45 Roundtable Discussion
- Conclude Hot Topics Discussion
  - HR – IOC Forum
    - Adjustments
    - New Ideas
- 9:45 - 10:00 Evaluations/Giveaways



## Information Systems Caucus

Chair: Barb Shepard, Director, Project Management Office, BCBS Kansas City

### Monday, July 12

10:00 - 10:15	Welcome/Introductions
10:15 - Noon	Plan Highlights
Noon - 1:00	Lunch
1:00 - 1:30	Hot Topics: Develop list of hot topics to discuss Wednesday morning
1:30 - 2:30	IT Governance – Resource Management and Project Prioritization: Discuss plan processes, tools and organizational structures to support IT Governance
2:30 - 2:45	Break
2:45 - 3:45	IT Governance (continued)
3:45 - 4:00	Evaluations/Giveaways

### Tuesday, July 13

9:45 - 11:30	InterPlan Initiatives and Legislative Update w/Q&A by Doug Porter, CIO, BCBSA
11:30 - 12:15	IT Implications of Health Care Reform: New investments, cost-saving opportunities, new compliance requirements; identify collaboration opportunities
12:15 - 12:30	Evaluations/Giveaways

### Wednesday, July 14

8:00 - 9:30	Discuss Top 3 to 4 Hot Topics
9:30 - 9:45	Discuss 2011 Caucus
9:45 - 10:00	Evaluations/Giveaways



## Membership Caucus

Chair: Daniel J. Duffy, Director, Group Membership, BCBS Minnesota

### Monday, July 12

10:00 - 10:15	Caucus Welcome/Introductions/Ground Rules/Ice Breaker
10:15 - 10:30	Review Agenda, Solicit Key Emergent Topics
10:30 - 11:30	Plan Updates: Plan participants provide an overview of significant changes, major process improvements, or current issues.
11:30 - 1:00	Lunch
1:00 - 2:00	Vendor Discussion (small group breakout session): A discussion on portal enrollment, ID card fulfillment, electronic file enrollment, correspondence fulfillment, and billing vendors utilized by each plan.
2:00 - 2:15	Break
2:15 - 3:45	Vendor Discussion (continued) and Plan Updates: Plan participants provide an overview of significant changes, major process improvements, or current issues.
3:45 - 4:00	Evaluations /Giveaways

### Tuesday, July 13

9:45 - 11:00	Changes to MTM: What are plans changing to prepare for the new requirements? What are plans doing to get closer to getting more timely and relevant information to members at point-of-enrollment?
11:00 - 12:15	Plan Updates (continued from Monday)
12:15 - 12:30	Evaluations/Giveaways

### Wednesday, July 14

8:00 - 9:45	Discuss Quality Improvements/MTM Scores and Key Topics <ul style="list-style-type: none"> <li>Quality Improvements/MTM Scores: Participants will discuss changes made to improve their quality and their MTM scores.</li> <li>Key Topics: A recap of the session and time set aside to review and discuss parking lot items identified throughout the session.</li> </ul>
9:45 - 10:00	Evaluations/Giveaways