

Program SCHEDULE

REGISTRATION AND CONTINENTAL BREAKFAST

8:00-8:30 a.m.

OPENING REMARKS AND SESSION INTRODUCTION

8:35-8:45 a.m.

John Webber, CEBS
Chapter President

SESSION 1

8:45-10:15 a.m.

HEALTH CARE PLAN DESIGNS

Steven Vilella, CEBS
Vice President
Health and Welfare Practice Leader
Touchstone Consulting Group

- Evolution of medical plans
- Medical plan types and features
 - Catastrophic coverage
 - Comprehensive
 - Managed care
 - > HMO
 - > POS
 - > PPO
 - > CDHP
- Medical plan selection factors
- Management techniques
 - Funding methods
 - Cost sharing
 - Carve outs
- Specialty programs
 - Vision care
 - Wellness benefits
 - Reimbursement accounts
- Plan design case studies
 - National employer profile
 - Regional employer profile

SESSION 11

10:30 a.m.-12:00 noon

HEALTH CARE PLAN ADMINISTRATION

Patrick J. Haraden, CEBS, CLU, ChFC,
REBC, RHU, LIA
Senior Vice President
Longfellow Benefits

- Strategy development
- Enrollment management
 - Database quality
 - Eligibility
 - Enrollment issues
 - Conversions
 - Waivers
 - Updates
 - Monitoring
- Billing management
 - Options
 - Issues
- Renewal strategies
 - Time line factors
 - Review proposed plan
 - Assess plan assumptions
 - Impact assessment
 - Assess plan alternatives
 - Benchmarks
 - Finalize terms
- Open enrollment strategies
 - Finalize plan
 - Communication
 - Materials
 - Vendor tools and resources
 - Meetings
 - Key issues and considerations
- Compliance requirements
 - ERISA
 - COBRA
 - HIPAA
 - IRS cafeteria plans
 - FMLA
 - USERRA

LUNCH — PROVIDED

12:00 noon-1:00 p.m.

BREAKS

10:15-10:30 a.m.
3:00-3:15 p.m.

SESSION 111

1:00-3:00 p.m.

HEALTH CARE PLAN FINANCING

Philip A. Grisafi, CEBS, ISCEBS Fellow
Senior Vice President
Mosse and Mosse Insurance Associates, Inc.

- Financing alternatives
 - Fully insured
 - Self-funding
 - Other insured methods
 - Experience rated
 - Community rated
 - Pooling
 - Retrospective premium
 - Retention
 - Reinsurance protection
- Medical cost drivers
 - Demographics
 - Recent cost drivers
 - Cost trends
 - Obesity
- Cost-saving strategies
 - Eligibility
 - Waiting periods
 - Plan changes
 - Contribution strategies
 - Preexisting conditions
 - Opt-outs
 - Spousal changes
- Provider reimbursement issues
 - Reasonable and customary
 - Fee schedules
 - Capitation
 - DRGs (RBRVSs)
 - Tiered physician reimbursements
 - High-performance networks
- Controlling future costs
 - Information
 - Communication
 - Disease management
 - Case management
 - Prevention
- Employee consumerism
 - Health Reimbursement Accounts (HRAs)
 - Health Savings Accounts (HSAs)
- Impact of lifestyle choices

SESSION 11V

3:15-4:30 p.m.

WELFARE PLAN DESIGNS

Christine M. Heier, CEBS, LIA
Principal
Sullivan Benefits

- Overview of welfare plans
 - Definition
 - Purpose
 - Eligibility
 - Tax effectiveness
- Survivor benefit considerations
 - Life insurance
 - Accidental insurance
 - Social Security
 - Long-term disability
 - Retirement plan
- Disability benefit considerations
 - Short-term disability
 - Long-term disability
 - Case management and prevention trends
 - Workers' compensation
 - Social Security
- Other benefit considerations
 - Long-term care
 - Tuition assistance
 - Financial planning
 - Adoption assistance
 - Employer assistance programs
 - Work/family programs (child/elder)
 - Domestic partner coverage
 - Group auto insurance
 - Group home insurance
 - Health club membership
 - Legal assistance
 - Credit union/banking
 - Employee discounts
 - Spending accounts (health or dependent care)

WRAP UP AND EVALUATIONS

Massachusetts Insurance Division has approved seven credit hours for your Massachusetts Insurance License.

DATE: October 28, 2009 (Wednesday)
TIME: 8:30 a.m.-4:30 p.m. (Breakfast and lunch are provided.)
LOCATION: Sheraton Four Points
 1125 Boston Providence Turnpike
 Norwood, MA 02062
 (781) 255-3155 www.fourpointsnorwood.com

MEMBER COST*: \$200*
NONMEMBER COST*: \$225*
R.S.V.P.: Payment must be received by October 16, 2009.
 Payment can be made by check or credit card via PayPal.
 *Includes breakfast, lunch, breaks and program materials.
 Tax ID #04-2935058

REGISTRATION FORM (Please Type or Print)

Name _____

Title _____

Company _____

Address _____

City _____ State _____ ZIP _____

Telephone (____) _____ Fax (____) _____

E-Mail _____

Make check payable and mail to: **GREATER BOSTON CHAPTER—ISCEBS**
Attn: John Webber
United Healthcare
950 Winter St., Suite 1700
Waltham, MA 02451

If you have any questions, please call John Webber at (617) 699-7910 or e-mail at john_webber@uhc.com. You may also fax your registration to John Webber at (781) 419-8681.

R.S.V.P.: By October 16, 2009
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