

# SIIA Endeavors

## Mark Your Calendar for the Next Month's 36th Annual National Conference & Expo in Austin, Texas

**S**elf-Insurance Institute of America's (SIIA) upcoming National Conference & Expo is scheduled for September 25th-27th at the JW Marriott Austin in Austin, TX. This is the world's largest event focused exclusively on the self-insurance/alternative risk transfer marketplace and typically attracts more than 1,700 attendees from around the United States and from a growing number of countries around the world.

The National Conference & Expo will feature more than 40 educational sessions focusing on self-insured group health plans, captive insurance, self-insured workers' compensation programs and international self-insurance/ART trends.

### *Health Care Sessions include...*

#### ► **THE FUTURE OF STOP-LOSS - INDUSTRY LEADERS WEIGH IN**

A large segment of the self-insurance marketplace is directly linked to the stop-loss insurance marketplace, so the future of stop-loss is an important consideration for employers, TPAs and other industry service providers. This moderated panel discussion will feature senior executives representing leading director-writers and MGUs addressing forward-looking questions about the future of stop-loss. Audience

participation will be encouraged. Panelists include **Tom Doran**, President, Medical Risk Managers, **Steve Gransbury**, President, Accident & Health, QBE North America, **Mike Kemp**, Head Accident & Health NA, Swiss Re Corporate Solutions, **Brad Nieland**, Vice President, Stop-Loss, Sun Life and **Bob Baisden**, President, International Assurance of Tennessee, Inc.

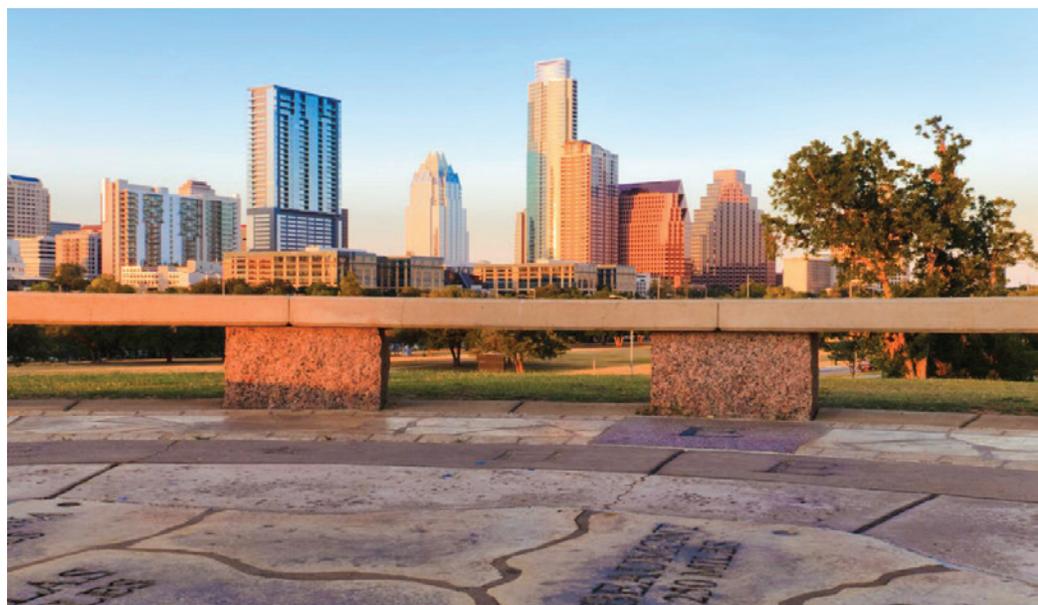
#### ► **MERGER, ACQUISITION & FUNDING STRATEGIES FOR TPA OWNERS/ EXECUTIVES**

There continues to be significant activity within the TPAs marketplace, where mergers, acquisitions and private equity deals

seem to be announced on a regular basis. Given this fast-paced financial environment, it is more important than ever for TPAs owners/executives to have a corporate growth strategy in place so they are prepared when opportunities present themselves. **Orlo (Spike) Dietrich**, Managing Director, Ansley Capital Group, LLC will provide expert guidance on how TPAs should best position themselves for major financial transactions.

#### ► **FROM VENDOR TO PARTNER - THE SELF-INSURER EMPLOYER'S PERSPECTIVE**

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have increasingly positioned themselves as long term business “partners” and not merely “vendors” for their clients. But what really is the difference? **Mark Hopkins**, CBP, Director, Compensation & Benefits of SWM International, an experienced corporate benefits executive with many of years of experience dealing with both vendors and partners shares his perspective. The presentation will also offer some “crystal ball” predictions on what self-insured employers may need from their true business partners in the future.

► **THE MID-MARKET SELF-INSURED EMPLOYER EXPERIENCE WITH MEDICAL TRAVEL**

Taking a page from the travel surgery playbooks that the large, high-profile companies have followed over the past few years, mid-size or smaller employers and plan sponsors now recognize that the site of service significantly impacts the cost of care and is a key determining factor in selecting where to have procedures performed – everything from MRIs and diagnostics to complex surgeries. Learn how Third Party Administrators and employers are educating and incenting employees to make better choices – from reducing coinsurance to eliminating copayments, paying travel expenses or cash rewards. The goal is to help employees seek the right care at the right time in the right place. Panelists include **Mark Kendall**, Senior Partner, HUB International, **Simeon Schindelman**, CEO, Brighton Health Plan Solutions and **Carrie Hatch**, Chief Operating Officer, Ameriben.

► **TPAs ENTERING THE ACO WORLD** Dale N. Lyman, Head of Network and Cost Management Strategy at Meritain Health, an Aetna Company, will describe how one of the country’s leading third party administrators has successfully adapted its business practices to partner effectively with a

growing number of accountable care organizations (ACOs). He will also provide unique insights on the continued evolution of the ACO marketplace and what it means for TPAs, stop-loss carriers and other self-insurance industry service providers.

► **SPECIALTY PHARMACY MANAGEMENT STRATEGIES FOR SELF-INSURED EMPLOYERS**

Specialty pharmacy continues to be a major cost driver for most self-insured health plans. **Patrick Gallagher**, Chief Actuary, Integro Insurance Brokers and **Gary L. Cellini**, PharmD, MBA, HealthCare Management Consultant, Cellini & Associates, LLC will provide useful analysis on the latest market trends and present some tangible strategies to help plan administrators get a better handle on these significant costs.

► **PRIVATE INSURANCE EXCHANGE CONSIDERATIONS FOR SELF-INSURED EMPLOYERS**

Private insurance exchanges have grown in popularity over the last couple years in both the fully-insured and self-insured market segments. **Shandon Fowler**, Sr. Director of Product Strategy, Benefitfocus, **Tevi Troy**, Chief Executive Officer, The American Health Policy Institute and **Alan Cohen**, Strategy Officer and Co-Founder of Liazon will focus on how self-insured plan sponsors and administrators should evaluate private insurance exchange options to determine the relative value, potential drawbacks and implementation details and related costs.

► **BUNDLED PAYMENT SOLUTIONS FOR SELF-INSURED PAYERS**

**Mark Stadler**, CEO, BridgeHealth will discuss what TPAs and self-insured employers should know when

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evaluating bundled payment solutions for various types of medical providers and procedures.

### ► **REFERENCED-BASED PRICING - THE HOSPITAL'S PERSPECTIVE**

While there has been increased discussion within the self-insurance industry on the relative merits of various reference-based pricing approaches, this session will look at this trend from the opposite direction. **Emily Scott, Esq.**, Attorney, Hirschler Fleischer, who has advised multiple hospitals on how to respond and interact with self-insured payers taking RBP approaches shares her unique insights on how hospital administrators view common points of contention, as well as opportunities for more collaborative payment arrangements.

### ► **FERTILITY/INFERTILITY TREATMENT COVERAGE TRENDS FOR SELF-INSURED EMPLOYERS**

While employers that sponsor self-insured group health plans are not required to cover any form of fertility/infertility treatments, an increasing number of self-insured employers are starting to do so voluntarily in various ways. **Karin Ajmani**, President, Progyny will discuss coverage trends generally and provide self-insured plan administrators more detailed information, including plan design consideration, on what they need to know when considering fertility coverage options.

### ► **DATA-DRIVEN MEDICARE REFERENCE CONTRACTING**

The State of Montana and other employers have expressed a desire for transparency, comparability, consistency and predictability in healthcare pricing. Using data comparing allowed amounts to Medicare as a common

reference, contracts have been developed that keep the more efficient providers revenue neutral while encouraging broader financial efficiency. **Ron Dewsnap**, President & General Manager, Allegiance Benefit Plan Management and **Marilyn Bartlett**, Administrator, Health Care and Benefits Division, State of Montana will discuss the goals, process and outcomes of the development of a network of Medicare reference-based contracted providers.



### ► **LAW & DISORDER - RECENT LITIGATION SHAKING UP THE STATUS QUO FOR SELF-INSURED HEALTH PLAN ADMINISTRATORS**

Courts have been busy since the passage of ACA, which has created some confusion over mandatory benefits, fiduciary liability, rights to subrogate and other plan administration details. Add to this pending ERISA preemption case rulings and the shifting legal terrain continues to shake up the self-insurance marketplace. **Ron Peck, Esq.**, Senior Vice President & General Counsel, The Phia Group will highlight legal developments over the past year and preview what may be ahead.

### ► **SELF-INSURED EMPLOYER ROUNDTABLE DISCUSSION SESSION**

Self-insured employer attendees are invited to participate in a private roundtable-style discussion session designed to facilitate candid discussion on key plan administration issues and concerns. This session will also serve as an opportunity for participants to provide input/suggestion on how SIIA can maximize its value proposition for self-insured employers. (Industry service providers will not be allowed to attend this session.)

### ► **BROKER ROUNDTABLE DISCUSSION SESSION**

Broker attendees are invited to participate in a private roundtable-style discussion session designed to facilitate candid discussion on the role of brokers within the self-insurance marketplace. This session will also serve as an opportunity for participants to provide input/suggestions on how SIIA can maximize its value proposition for brokers.

► **REFERENCE BASED PRICING-EXPLORING DIFFERENT STRATEGIES AND APPROACHES**

While referenced based pricing is often viewed as a specific cost management strategy, there are actual several variations of referenced based pricing now being utilized within the self-insurance marketplace. For this moderated panel discussion, we have pulled together several of the industry's leading RBP experts who share their unique perspectives on the different approaches that self-insured employers and TPAs may want to consider as it relates to payment arrangements with important medical care providers. Panelists include **Mike Dendy**, CEO, Advanced Medical Pricing Services (AMPS), **Steve Kelly**, President & CEO, ELAP Services, **Edward Day**,

CEO, HS Technology Solutions Inc., **Tim Martin**, Esq., EVP & General Counsel, Payer Compass, LLC and **Adam Russo**, Esq., CEO, The Phia Group.

► **ACA AND HEALTH BENEFITS COMPLIANCE UPDATE: WHAT WORKS AND WHAT DOESN'T**

Keep abreast of the latest developments impacting employer sponsored health plans. **John Hickman**, Esq., Partner, Alston & Bird, LLP will cover topics including a deep dive on new and proposed legislation and regulatory guidance, the employer responsibility ("pay or play") requirement and ACA reporting obligations, reference based pricing, employer clinics, MEC/skinny plans and wellness program rules.

*Captive Insurance Sessions include...*

► **INTRODUCTION TO CAPTIVE INSURANCE FOR MIDDLE-MARKET COMPANIES**

In this beginner level session, **Bob Davidson**, Managing Director of Iroquois Captive Services, LLC will provide a general overview of captive insurance with additional focus on the types of captive programs best suited for middle market companies, such as enterprise risk captives, stop-loss captive programs and P&C group captive programs.

► **CAPTIVE REGULATOR PANEL DISCUSSION**

Regulators from leading captive insurance domiciles including **Raymond Martinez**, Senior Deputy Commissioner, Company Services Group, North Carolina Department of Insurance, **David Provost**, Deputy Commissioner, Captive Insurance,

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Vermont Department of Financial Regulation, **Michael Corbett**, Director, Captive Insurance Section, Tennessee Department of Commerce & Insurance, **Steve Kinion**, Director, Bureau of Captives and Financial Insurance Products, Delaware Insurance Department and **W. Jay Branum**, Director of Captives, South Carolina Department of Insurance will participate in a moderated discussion session where the hottest industry issues will be addressed. Audience participation will be encouraged.

### ► MARKET TRENDS FOR STOP-LOSS CAPTIVE PROGRAMS

Stop-loss captive programs have become one of the fastest growing segments within the captive insurance industry. **Andrew Cavenagh**, Managing Director of Pareto Captive Services will look at the size and scope of the market today, current challenges/opportunities and preview how the market may evolve in the years ahead.

### ► WHERE DO WE GO FROM HERE? THE PAST, PRESENT AND FUTURE OF ERC CAPTIVE REGULATION

**Fred Tuner**, Founder of Active Captive Management and **Ryan Work**, Vice President, Government Relations for the Self-Insurance Institute of America, Inc. will discuss the impact of how changes to federal regulation can impact state regulation of insurance. How 831(b) was recently changed is but one example of this – a change to the tax code that has impact on the business of certain kinds of insurers. Panelists will discuss the reasons why the tax code was recently changed, what happened with regard to how the tax code was amended and a discussion of the current regulatory climate with regard to the small captive industry space. Panelists will also discuss the history of IRC Section 831(b) as responsive to the insurance crisis of the 70s to the mid-80s. This session will provide a history lesson on why this important provision of the Code was created and implemented.

### ► THE EVOLVING USE OF ENTERPRISE RISK CAPTIVES (ERCS)

The use of Enterprise Risk Captives (ERC) has steadily increased over the past few years as smaller and mid-sized companies have established these

ART programs for more diverse risk exposure. With recent tax code changes increasing the annual premium limit to \$2.2 million and imposing some ownership restrictions to qualify for the 831(b) tax election, the evolution of ERC use may accelerate further. **Michael Serricchio**, Senior Vice President of Marsh Captive Solutions and **Patrick Theriault**, Managing Director of Strategic Risk Solutions, Inc. will share their opinion and perspectives on this topic as part of a moderated panel discussion.

### ► TAKING MULTIPLE BITES OF THE SELF-INSURANCE/ CAPTIVE INSURANCE APPLE

Sophisticated employers are increasingly incorporating multiple self-insurance/captive solutions as part of a more holistic approach to managing financial risks. **Timothy LaMotte**, CPA, Chief Financial Officer, Northern Tree Service, Inc. and **Bob Ryals**, Risk Manager, TCW, Inc. will showcase two case studies of real world employers who have taken multiple bites of “the self-insurance/captive insurance apple,” explaining what strategies work best based on size and risk profiles and discuss how various self-insurance strategies can best work in concert.

### ► COST CONTAINMENT STRATEGIES AND OPPORTUNITIES FOR EMPLOYERS IN STOP-LOSS CAPTIVE PROGRAMS

Self-Insured employers continue to be trailblazers on implementing effective health care cost containment strategies. **Scott Byrne**, RVP - Western Territory of Berkley Accident & Health and **Michael Madden**, Division Senior Vice President, Artex Risk Solutions will explore strategies that can work particularly well when employers are

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pooled together as part of stop-loss captive programs. It will also highlight certain cost management services that smaller and mid-sized self-insured employers can only access, or access at a lower cost, when pooled with other employers.

**► ADVANCING THE INTERESTS OF THE CAPTIVE INSURANCE STAKEHOLDERS - THE SIIA STORY** SIIA

has spearheaded several important initiatives over the past year to advance the interests of the captive insurance segment of the self-insurance industry.

**Michael W. Ferguson**, President and CEO of the Self-Insurance Institute of America, Inc. will highlight these initiatives and preview what's ahead for 2017. ■



*We will give a preview of self-insured workers' compensation programs and international self-insurance/ART trends in our September article. Detailed conference information, including registration forms, can be accessed online at [www.siaa.org/national](http://www.siaa.org/national), or by calling (800) 851-7789. We look forward to seeing you in Austin this September!*

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