



SPBA 2024 Hybrid Fall Meeting Agenda
Wednesday, September 25 – Friday, September 27
The Westin Kierland Resort & Spa - Scottsdale, AZ
(In-Person and Online)

Meeting Time is Mountain Standard Time/Arizona Time

The meeting will take place in the Herberger 3AB ballroom unless otherwise specified.

Wednesday, September 25

5:45 PM - Registration Opens. *Hallway outside Brittlebush room*

6:00 – 7:00 PM - SPBA 2024 Fall Meeting Welcome Reception for All Attendees.
Brittlebush

Thursday, September 26

7:15 – 8:00 AM - Continental Breakfast. *Herberger Foyer North (outside the ballroom)*

8:00 – 8:20 AM - Welcome, Opening Announcements – *Chairman Kris Smith; President Anne Lennan.*

8:20 – 9:35 AM - Building TPA Sales & Marketing Success – This session will provide TPA Management with the knowledge and tools to ensure that the Sales & Marketing goals of the organization are met and TPA services are sold and delivered ethically and transparently. Success factors such as Relationships, Messages, Partnerships, Distribution Network, Reputation, Creativity, Operational Support and Sales Team members will be discussed in the context of reaching goals related to Net Revenue Growth and Business Retention. This session will review the 7 critical components for TPA Sales & Marketing success. *Glenn McLellan, McLellan Consulting Services. Moderator: Eric Schulman.*

9:35 – 10:30 AM - Compliance Update I – This update will include numerous issues. Update on Mental Health Parity and Addiction Equity Act, including an action plan for administrators and plan sponsors. Impact of the Supreme Court’s decision in Loper Bright on health plans and what impact it will have on benefit plan regulations. Excessive payments litigation: Addressing the new fad in health plan litigation. PBM roundup – Review proposed federal legislation; state legislation and related litigation; accumulator and maximizer programs. Are PBM manufacturer assistance programs compliant? *Ashley Gillihan, Alston & Bird. Moderator: Jill Volanti, Contigo Health.*

10:30 – 10:45 AM - Break

10:45 – 11:45 AM – Compliance Update II – Can group health plans exclude gender-affirming care? The final regulations on Section 1557 of the Affordable Care Act are complex and HHS warns the regulation is very wide-reaching. Learn if and when these rules apply to TPAs and the group health plans they administer. HIPAA privacy rules, including Change Cyberattack lessons to learn, TPA best practices, reproductive rights requirements. Tips for protecting against litigation; excessive fee case roundup; Gag clause issues; and More! *Ashley Gillihan, Alston & Bird. Moderator: Jill Volanti, Contigo Health.*

11:45 – 1:00 PM – Lunch *Herberger 4,5*

1:00 – 1:45 PM - Workshops

- **Workshop A – Stop-Loss Basics.** *Lori Sartori, SL Management Partners. *Herberger 1**
- **Workshop B – Advanced Stop-Loss.** *Eric Schulman. *Herberger 2**
- **Workshop C - Fundamentals of Health Plan Administration** – BAAs, the claims and appeals process, privacy, documents, DOL audits, changes to Medicare part D imposed by the Inflation Reduction Act and the impact on HDHPs. *Ashley Gillihan, Alston & Bird.*

1:45 – 2:00 PM - Break

2:00 – 2:50 PM - Taking Back the TPA’s Power in Stop-Loss Solutions – With recent merger and acquisition activity, the role of TPAs in stop-loss marketing and management has been cast aside in pursuit of revenue growth and profits. Many major brokerage and consulting firms have purchased general agencies or developed internal stop loss panels. This session will provide insight into how TPAs can regain their position as a stop loss solution for self-funded employers and their brokers. *John Youngs, Prodigy Health Insurance; Mike Tushman, IOA Re; Jessica Rozal, Symetra.*

2:50 – 3:45 PM - Stop-Loss Claims: Ways to Win More Business in a BUCA World – Stop-loss experts will discuss what they are seeing from the market, advantages for groups to consider working outside the BUCA environment, pre-payment solutions to drive down cost, ways to increase effectiveness working together to win more business and keep more renewals. *Christine Tuneburg, SL Management Partners; Mike Holthaus, Summit Re; Jarrod Weenum, Boon-Chapman, and Andrea Gambardella. Moderator: Lori Sartori, SL Management Partners.*

3:45 – 4:00 PM - Break

4:00 – 4:50 PM - What Your TPA Firm Needs to Know about Captives – Ready to explore how captives can elevate your TPA firm’s growth and service offerings? Learn about the advantages of Captives for your clients. This educational session will provide crucial insights into why Captives are the superior choice for small and mid-size employers compared to traditional stop loss and level-funded solutions. Discover how working with Captives can accelerate your firm’s growth, enhance your service offerings, and build a robust pipeline of business. Gain an understanding of the RFP process and the unique benefits Captives bring to

both TPAs and their clients. Don't miss this opportunity to gain valuable knowledge from experts and stay ahead in the competitive benefits landscape. *Rob Hamilton, Roundstone; and Eric Schulman.*

4:50 – 5:30 PM - Weighing in on Weight Loss Medications: Effective PBM Strategies – With obesity impacting 42% of the US population, it's no wonder that Wegovy, Ozempic, and other commonly prescribed GLP-1 medications are in demand as pharmacological weight-loss treatments. This session will share clinical and cost management solutions, and lifestyle approaches to help guide plan sponsors through the challenging weight-loss landscape. Hear about market trends and increasing demand for these medications, as well as plan design considerations to help manage costs.

Research predicts that 24 million people, or 7% of the US population, will rely on GLP-1s for weight loss by 2035. To prepare for the continued high demand and financial pressures, plan sponsors need to act now to develop solid management strategies for coverage decisions, including the importance of incorporating behavioral health programs into plan strategies. In addition to lifestyle management, prior authorization related to A1C levels or body mass index (BMI) can help ensure proper utilization. Attend this session for a focused perspective that anticipates and helps plan sponsors meet the needs of their workers while preparing for the continuing surge in weight-loss medications. *Steven Boyd, Liviniti. Moderator: Jamie Farrell.*

5:30 – 6:30 PM – Cocktail Reception. *Mariposa room*

Friday, September 27

7:00 – 7:45 AM - Continental Breakfast. *Herberger Foyer North*

7:45 – 8:45 AM - The Transformational Power of Generative AI in Health Benefits Administration – Hear the strategic implications of Gen AI for TPAs and the game-changing benefits of Gen AI (over traditional AI). SPBA Board member Richard Hardin will share how his TPA firm is embracing this leading-edge technology. *Anoop Mehendale, Xficient. Moderator: Richard Hardin.*

8:45 – 9:00 AM - Break

9:00 – 11:45 AM - Cyber Security Training Event

Join us for an engaging and informative event designed to help businesses of all sizes understand and mitigate the risks in the cybersecurity landscape. Hosted by Bob Michie, a seasoned cyber security expert and Amazon best-selling author of “Managing Your Business Risk in the Cybersecurity Minefield,” this event will provide actionable insights and practical strategies to protect your business.

Key Takeaways:

- **Understanding Cyber Threats:** Learn about the latest threats in the digital space and how they can impact your business.

- **Risk Management Strategies:** Discover effective approaches to identifying and managing cybersecurity risks.
- **Practical Solutions:** Gain practical advice and solutions that can be immediately implemented in your organization to enhance cybersecurity.
- **Expert Q&A:** Get your pressing questions answered by an expert with years of hands-on experience.

9:00 – 9:50 AM - Protecting CEOs Online – In today’s digital age, CEOs are high-value targets for cybercriminals. This session delves into the various strategies and best practices that can be employed to safeguard the online presence of your company’s top executives. We will cover the importance of personal online security measures, how to manage and mitigate risks associated with social media, and the role of personal assistants and executive teams in maintaining digital security. By the end of this session, attendees will have a comprehensive understanding of how to protect their leaders from cyber threats. Additionally, we will discuss real-world examples of security breaches involving high-profile individuals and the lessons learned from those incidents. *Bob Michie, MetroMSP. Moderator: Brent Monroe.*

9:50 – 10:45 AM - FTC Safeguards – Compliance with the Federal Trade Commission (FTC) Safeguards Rule is essential for businesses handling sensitive consumer information. This session will provide an overview of the FTC Safeguards Rule, including its key requirements and how businesses can ensure compliance without delving into detailed program creation. Topics will include establishing and maintaining a written information security plan, conducting risk assessments, and implementing ongoing monitoring and testing to ensure effectiveness. We will emphasize the importance of compliance in strengthening consumer trust and mitigating legal risks. Additionally, we will provide resources for further information and discuss case studies that illustrate best practices and common pitfalls in meeting FTC standards. *Bob Michie, MetroMSP. Moderator: Brent Monroe.*

10:45 – 11:00 AM - Break

11:00 – 11:45 AM - Cyber Insurance Requirements for Business Owners – As businesses face an increasing number of cyber risks, having the right cyber insurance policy is crucial. This session will explore the different types of cyber insurance available, and the specific requirements business owners need to meet to secure a policy. Topics will include the evaluation of potential risks, understanding policy coverage options, and the steps to take in the event of a cyber incident. Attendees will learn how to assess their own cyber insurance needs, what insurers typically look for, and how to ensure their business is adequately protected. Additionally, we will discuss case studies to illustrate the practical application of cyber insurance in various business contexts and the financial impacts of not having appropriate coverage. *Bob Michie, MetroMSP. Moderator: Marc Paulson.*

11:45 – 11:50 AM - Closing Remarks by Chairman of the Board Kris Smith.