

# San Francisco Health Service System Health Service Board

## Board Forum

### Aon Client Service Plan

November 9, 2017

# Aon's Client Promise to the SFHSS Health Service Board



## Aon's Ongoing Commitment to the SFHSS Health Service Board

Value	Current Model	Modification	Measurement
<b>Partnership</b>	<ul style="list-style-type: none"> <li>▶ Valued partnership with all stakeholders: Health Service Board (HSB), staff &amp; vendors</li> <li>▶ Ongoing dialogue with Acting Director Griggs, President Scott, and SFHSS staff via weekly calls and in-person meetings</li> <li>▶ Ongoing calls and meeting with vendor partners – monthly and quarterly</li> </ul>	<ul style="list-style-type: none"> <li>▶ Seamless onboarding of lead actuary</li> <li>▶ Continued development of open communication and dialogue with the HSB through President Scott</li> </ul>	<ul style="list-style-type: none"> <li>▶ Monthly check-in with SFHSS by Lori Goltermann, Aon CEO, U.S. Retail and Will Sneden, Aon U.S. Health &amp; Benefits Practice Leader</li> <li>▶ Monthly check-in with SFHSS Acting Director and COO Mitchell Griggs and SFHSS CFO Pamela Levin by Won Andersen</li> </ul>

## Aon's Ongoing Commitment to the SFHSS Health Service Board

Value	Current Model	Modification	Measurement
<b>Innovation &amp; Expertise</b>	<ul style="list-style-type: none"> <li>▶ Bring depth and breadth of expertise</li> <li>▶ Continued access to Aon's subject matter experts— Paige Sipes-Metzler (Clinical), Michael Cryer (Clinical / ACO), Kevin DeStefino (Pharmacy), Rachel Arnedt (Compliance)</li> <li>▶ Continuously bring new ideas and solutions based on the needs of the SFHSS program</li> </ul>	<ul style="list-style-type: none"> <li>▶ Continued development and growth of subject matter expert relationships</li> </ul>	<ul style="list-style-type: none"> <li>▶ Annual client survey</li> <li>▶ Ongoing checkpoints with SFHSS by Lori Goltermann, Will Sneden and/or Won Andersen</li> </ul>

## Aon's Ongoing Commitment to the SFHSS Health Service Board

Value	Current Model	Modification	Measurement
<b>Excellence</b>	<ul style="list-style-type: none"> <li>▶ Timely, high quality advice and deliverables</li> <li>▶ Disciplined approach to SFHSS cycle of work: stewardship, strategy, pre-renewal, renewal, implementation and ongoing</li> <li>▶ Detailed project plan and annual calendar</li> <li>▶ Annual debrief, strategy and renewal planning meeting</li> </ul>	<ul style="list-style-type: none"> <li>▶ Quarterly in-person check-in</li> <li>▶ Enhanced time commitment to planning – strategic and operational</li> </ul>	<ul style="list-style-type: none"> <li>▶ Annual client survey</li> <li>▶ Ongoing checkpoints with SFHSS by Lori Goltermann, Will Sneden and/or Won Andersen</li> </ul>

## Aon's Ongoing Commitment to the SFHSS Health Service Board

Value	Current Model	Modification	Measurement
<b>Results</b>	<ul style="list-style-type: none"> <li>▶ Annual renewal outcomes have been below the industry cost curve over the past several years</li> <li>▶ Delivery of cost effective programs</li> <li>▶ Execution of renewal strategy</li> <li>▶ Audit support with positive outcomes</li> </ul>	<ul style="list-style-type: none"> <li>▶ Continue to leverage data resources through vendor partners and the Truven data warehouse to identify and assess program modifications (as needed)</li> </ul>	<ul style="list-style-type: none"> <li>▶ Annual client survey</li> <li>▶ Ongoing checkpoints with SFHSS by Lori Goltermann, Will Sneden and/or Won Andersen</li> </ul>

# Aon's Ongoing Commitment to the SFHSS Health Service Board

Value	Current and Future Model	Measurement
<b>Overall</b>	<ul style="list-style-type: none"><li>▶ Full team's commitment to service excellence, backed by Aon Leadership, to both the HSB and SFHSS Staff</li><li>▶ Commitment to improve work process and efficiencies for SFHSS Staff</li><li>▶ Commitment to bring well-thought, innovative ideas that are specific to SFHSS needs</li></ul>	<ul style="list-style-type: none"><li>▶ Annual client survey</li><li>▶ Ongoing checkpoints with SFHSS by Lori Goltermann, Will Sneden and/or Won Andersen</li><li>▶ Pre and post-renewal check-in/debrief with SFHSS staff</li></ul>

# SFHSS Health Service Board ▶ Aon Service Team

**Won Andersen ▶ Account Executive**

Responsible for the overall health and benefits relationship, strategy and peer review

**Anne Thompson ▶ Account Manager**

Responsible for day-to-day activities and peer review

**Suzanne Kohlmann ▶ Project Manager**

Responsible for management of day-to-day activities and peer review

**Grant Dethlefsen ▶ Health & Benefits Analyst**

Generalist support

**Mike Clarke ▶ Lead Actuary**

Responsible for overall actuarial work delivery, strategy and peer review

**Tom Ricks ▶ Actuarial Manager**

Responsible for day-to-day actuarial activities and peer review

**Tim Wang ▶ Actuarial Analyst**

Actuarial support

**Scott Heldfond ▶ Relationship Manager**

Responsible for the overall relationship

## Subject Matter Experts

**Paige Sipes-Metzler, DPA, MS, RN ▶ Clinical**

**Kevin DeStefino, RPh ▶ Pharmacy**

**Michael Cryer, MD ▶ Clinical / ACO**

**Rachel Arnedt, JD ▶ Compliance**

# Annual Support Calendar

Month	Detail
January	Benchmark copays
	Receive City Plan ASO renewal from UHC
	Prepare City Plan (active / early retiree) admin fees
	Prepare City Plan claims experience and stabilization reserve
	Prepare Health Care Sustainability Budget
February	Review post enrollment analysis
	Receive renewals from non-health carriers (Best Doctors, VSP, Aetna)
	Conduct survey of 10-County amount
	Review BSC non-Medicare claims experience, benefit design and claims stabilization

# Annual Support Calendar

Month	Detail
<b>February (continued)</b>	Prepare stop loss recommendation
	Begin to prepare HVI report
	Creditable / Non-Creditable Annual Disclosure to Centers for Medicare and Medicaid Services (CMS)—Required for all employers that offer prescription drug coverage and must be submitted 60 days after the beginning of the plan year (2/28)
<b>March</b>	Receive renewals from UHC Dental and Delta Dental
	Prepare City Plan benefits and contributions
	Risk score analysis
	Provide compliance support for 1095-B and 1095-C reporting due to employees—Statements for the calendar year should be provided to employees and/or recipients by 3/1

# Annual Support Calendar

Month	Detail
April	Receive renewal from BSC
	Prepare renewal report non-health carriers (Best Doctors, VSP, Aetna)
	Prepare Kaiser non-Medicare claims experience, premium contributions
	Prepare BSC non-Medicare claims experience, premium contributions
	Prepare UHC City Plan self-insured rate renewal for actives and early retirees
May	Receive renewals from Kaiser and UHC for Medicare retiree
	Prepare Kaiser Medicare benefits and premiums
	Prepare UHC Medicare benefits and premiums
	Prepare Delta Dental stabilization reserve
	Negotiate renewals

# Annual Support Calendar

Month	Detail
June	Final Board approval of rate sheets
	Prepare and send vendor confirmation letters
	Prepare Board of Supervisors letter
July	Open enrollment planning and communications
	Receive signed renewal confirmation letters from vendors
July	PCORI (Patient Centered Outcomes Research Institute) fee is reported and paid once per year on IRS Form 720 by July 31 of the calendar year immediately following the end of the plan year. Imposed on issuer of insurance policy (KP and BSC) or plan sponsor of self-insured health plan (UHC)
	Calculate IBNR and reserve calculations for auditor review
August	

# Annual Support Calendar

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Month	Detail
September	Update annual notices, SBCs, and benefit summaries
	Confirm / calculate Medicare Part D Creditability—Applies to all employers with Medicare Part D-eligible participants enrolled in an employer prescription drug plan (carrier confirms creditability and HSS is responsible for producing and posting / distributing the notice)
	Medical plan audit(s) begin
October	Open enrollment begins
November	Open enrollment concludes

# Annual Support Calendar

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Month	Detail
December	Renewal planning and strategy discussion
	Request renewals from all carriers (within first 2 weeks of December)
	Prepare rates and contributions calendar
	Finalize IBNR and contingency reserve calculations
	Medical plan audit(s) conclude

# Aon Project Management Tools: Delivering excellence to the SFHSS Health Service Board

# of	Category	Owner	Due Date	Priority	Status	Start Date	End Date	USB Owner	Comments/Description
1	Board Meeting	HS Board - November 9th	11/9/2017	High	Open	11/9/2017		Aria	Discussion - Review Statements of Work/Phases, Scope - Review 120 Election Plans - Reviewing Governance Plans - Open report (SOP/PLAC) - Trust issues (DLC) - News (discussion items only)
2	Board Meeting	HS Board - December 14th	12/14/2017	High	Open	12/14/2017			Discussion - Review of Wellness Assessment Results (2016/17) - Care Environment Update Meeting
3	Board Meeting	HS Board - January 17th	1/17/2018	Medium	Open	1/17/2018			
4	Report	Advisory Working Committee	2/16/2018	High	Open	1/16/2018			
5	Account Management	2018 Renewal Request Letters	3/16/2018	Medium	Open	1/16/2017			
6	Vendor Management	2017 Implementation	1/1/2018	High	Open	1/1/2018			
7	Vendor Management	2017 Performance Guarantees	1/1/2018	High	Open	1/1/2018			

Month	Month #	Category	Task Name	Detail	Owner
January	1	Financial Reporting	Financial Reporting for 2017	Review 2017 financials for 2017	HSS
	1	Strategy & Planning	Healthcare Strategy	Review 2017 healthcare strategy	Ach
	1	Financial	Financials	Review 2017 financials	Carroll
	1	Financial	Financials	Review 2017 financials	Ach
February	1	Financial	Financials	Review 2017 financials	HSS
	2	Financial	Financials	Review 2017 financials	HSS
	2	Strategy & Planning	Healthcare Strategy	Review 2017 healthcare strategy	Carroll
	2	Financial	Financials	Review 2017 financials	Carroll
March	3	Compliance	Medicare Part D Checklist	Review Medicare Part D Checklist	Carroll
	3	Compliance	ACA Reporting	Review ACA Reporting	Carroll
	3	Compliance	ACA Reporting	Review ACA Reporting	Carroll
	3	Compliance	ACA Reporting	Review ACA Reporting	Carroll
April	4	Compliance	ACA Reporting	Review ACA Reporting	Carroll
	4	Compliance	ACA Reporting	Review ACA Reporting	Carroll
	4	Compliance	ACA Reporting	Review ACA Reporting	Carroll
	4	Compliance	ACA Reporting	Review ACA Reporting	Carroll
May	5	Compliance	ACA Reporting	Review ACA Reporting	Carroll
	5	Compliance	ACA Reporting	Review ACA Reporting	Carroll
	5	Compliance	ACA Reporting	Review ACA Reporting	Carroll
	5	Compliance	ACA Reporting	Review ACA Reporting	Carroll
June	6	Compliance	ACA Reporting	Review ACA Reporting	Carroll
	6	Compliance	ACA Reporting	Review ACA Reporting	Carroll
	6	Compliance	ACA Reporting	Review ACA Reporting	Carroll
	6	Compliance	ACA Reporting	Review ACA Reporting	Carroll

Carrier	Line of Coverage	Primary Contact Name	Initial Renewal Request Sent	Renewal Request from Carrier	Commissions Confirmed	Initial Renewal Increase	Final Negotiated Increase
Blue Shield of Ca	MedicareRx	Jeanette Mone					
Kaiser	MedicareRx	Patricia Purvis					
United Healthcare	MedicareRx - Active	Heather Chianello					
United Healthcare	MedicareRx - Retiree	Heather Chianello					
Delta Dental	Dental	Raymond Lee / Ileana Cardona					
Vision Service Plan	Vision	Jennifer Carlson					
Best Doctors, Inc.	Second Opinion Medical Review	Nancy Oh					
Aetna	Basic Life Supplemental & OptimalDPA	Karen Hill					
Aetna	LTD	Karen Hill					

Month	Month #	Item
January	1	Legal and Accounts Overview
	1	Review Board status for the Insurance Bill and Dependent (DB) reserves for 2017 and Blue Shield
February	2	Review 2017 financials for 2017
	2	Review 2017 healthcare strategy
	2	Review 2017 financials for 2017
	2	Review 2017 financials for 2017
March	3	Review 2017 financials for 2017
	3	Review 2017 financials for 2017
	3	Review 2017 financials for 2017
April	4	Review 2017 financials for 2017
	4	Review 2017 financials for 2017
	4	Review 2017 financials for 2017
	4	Review 2017 financials for 2017
May	5	Review 2017 financials for 2017
	5	Review 2017 financials for 2017
	5	Review 2017 financials for 2017
	5	Review 2017 financials for 2017
	5	Review 2017 financials for 2017
	5	Review 2017 financials for 2017
June	6	Review 2017 financials for 2017
	6	Review 2017 financials for 2017
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Aon | Health & Benefits Consulting

**Project Management Plan**  
Health & Benefits Consulting

San Francisco Health Services System  
1145 Market Street  
San Francisco, California 94103

October 2017

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Component	Description (By Client)	Action Plan (Partnering)
Partnership	<ul style="list-style-type: none"> <li>Understand HSS strategy including overall objectives to maintain financials, sustainably</li> <li>Align with HSS business and strategy</li> <li>Always have HSS line of contact on mind</li> <li>Be available to bring ideas, opportunities, innovations, best practices and marketplace trends</li> <li>Share information with HSS staff, Board and vendors</li> </ul>	<ul style="list-style-type: none"> <li>Review 2017 plan of financial change, focus on implementation of SOX's Financial Review system</li> </ul>
Compliance	<ul style="list-style-type: none"> <li>Continue to bring deep knowledge and subject matter expertise including project management, financial, clinical, legal, insurance</li> </ul>	<ul style="list-style-type: none"> <li>Leverage HSS specific data, including financial and SOX, to inform actions</li> <li>Bring deep knowledge on San Francisco market and vendors</li> </ul>
Expertise	<ul style="list-style-type: none"> <li>Bring creative solutions that are specific to HSS strategy and objectives</li> <li>Identify unique culture and innovation</li> </ul>	<ul style="list-style-type: none"> <li>Partner solutions include setting high performance guarantees, strict track record, SOX, industry event speaking on innovation, industry benefits</li> </ul>
Innovation	<ul style="list-style-type: none"> <li>Bring creative solutions that are specific to HSS strategy and objectives</li> <li>Identify unique culture and innovation</li> </ul>	<ul style="list-style-type: none"> <li>Partner solutions include setting high performance guarantees, strict track record, SOX, industry event speaking on innovation, industry benefits</li> </ul>
Excellence	<ul style="list-style-type: none"> <li>To explore meetings</li> <li>Quality and accuracy of work, understand and define, and deliver</li> <li>Efficiently as consulting firm</li> </ul>	<ul style="list-style-type: none"> <li>Peer review process for financial audit and consulting advice</li> <li>Leverage power of Aon with vendor relationships</li> </ul>
Results	<ul style="list-style-type: none"> <li>Collaboration of client benefits</li> <li>Language and readability to improve pricing and terms</li> </ul>	<ul style="list-style-type: none"> <li>Review 2017 contract for financial review system</li> <li>Partner 2017 audit on innovation and financial performance</li> </ul>



## In Closing...

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- We would like to take the time to thank the San Francisco Health Service System Health Service Board, the San Francisco Health Service System Staff, the vendor partners of the San Francisco Health Service System, and members present today for partnering with Aon for 7+ years as well as for the opportunity to demonstrate our commitment to each of you not only through the current modifications but on an ongoing basis
- We welcome the opportunity to hear your feedback

***Thank you!***