# San Francisco Health Service System Health Service Board

# **Board Forum**

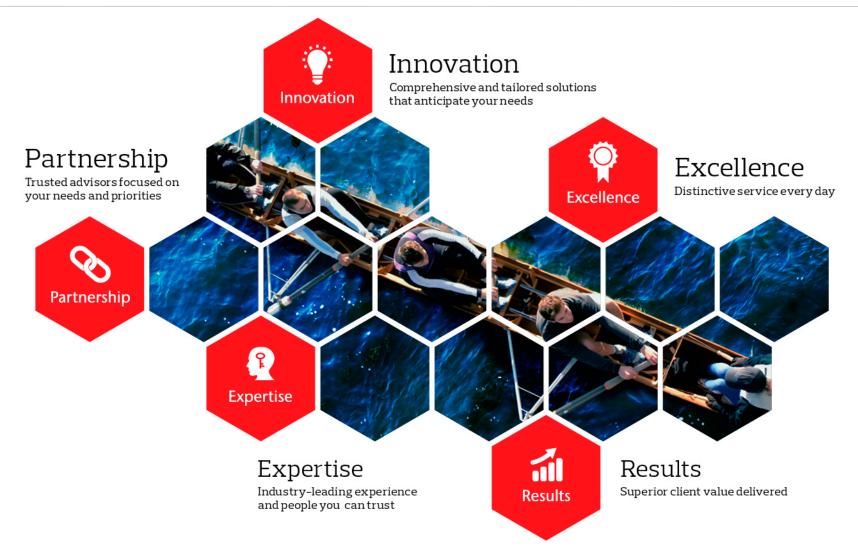
Aon Client Service Plan

November 9, 2017



Prepared by: Aon | Health & Benefits

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



**Empower Results®** 

| Value       | Current Model  | Modification   | Measurement  |
|-------------|--|--|--|
| Partnership | <ul> <li>Valued partnership<br/>with all stakeholders:<br/>Health Service Board<br/>(HSB), staff &amp; vendors</li> <li>Ongoing dialogue with<br/>Acting Director Griggs,<br/>President Scott, and<br/>SFHSS staff via<br/>weekly calls and in-<br/>person meetings</li> <li>Ongoing calls and<br/>meeting with vendor<br/>partners – monthly<br/>and quarterly</li> </ul> | <ul> <li>Seamless<br/>onboarding of<br/>lead actuary</li> <li>Continued<br/>development of<br/>open<br/>communication<br/>and dialogue<br/>with the HSB<br/>through<br/>President Scott</li> </ul> | <ul> <li>Monthly check-in<br/>with SFHSS by Lori<br/>Goltermann, Aon<br/>CEO, U.S. Retail<br/>and Will Sneden,<br/>Aon U.S. Health &amp;<br/>Benefits Practice<br/>Leader</li> <li>Monthly check-in<br/>with SFHSS Acting<br/>Director and COO<br/>Mitchell Griggs and<br/>SFHSS CFO<br/>Pamela Levin by<br/>Won Andersen</li> </ul> |



| Value                     | Current Model  | Modification  | Measurement  |
|---------------------------|--|---|--|
| Innovation &<br>Expertise | <ul> <li>Bring depth and breadth of expertise</li> <li>Continued access to Aon's subject matter experts—<br/>Paige Sipes-Metzler<br/>(Clinical), Michael Cryer<br/>(Clinical / ACO), Kevin<br/>DeStefino (Pharmacy),<br/>Rachel Arnedt<br/>(Compliance)</li> <li>Continuously bring new<br/>ideas and solutions based<br/>on the needs of the SFHSS<br/>program</li> </ul> | Continued<br>development and<br>growth of subject<br>matter expert<br>relationships | <ul> <li>Annual client<br/>survey</li> <li>Ongoing<br/>checkpoints<br/>with SFHSS<br/>by Lori<br/>Goltermann,<br/>Will Sneden<br/>and/or Won<br/>Andersen</li> </ul> |



| Value      | Current Model  | Modification  | Measurement  |
|------------|--|---|--|
| Excellence | <ul> <li>Timely, high quality<br/>advice and<br/>deliverables</li> <li>Disciplined approach<br/>to SFHSS cycle of<br/>work: stewardship,<br/>strategy, pre-renewal,<br/>renewal,<br/>implementation and<br/>ongoing</li> <li>Detailed project plan<br/>and annual calendar</li> <li>Annual debrief,<br/>strategy and renewal<br/>planning meeting</li> </ul> | <ul> <li>Quarterly inperson check-in</li> <li>Enhanced time commitment to planning – strategic and operational</li> </ul> | <ul> <li>Annual client<br/>survey</li> <li>Ongoing<br/>checkpoints with<br/>SFHSS by Lori<br/>Goltermann, Will<br/>Sneden and/or<br/>Won Andersen</li> </ul> |

**Empower Results®** 

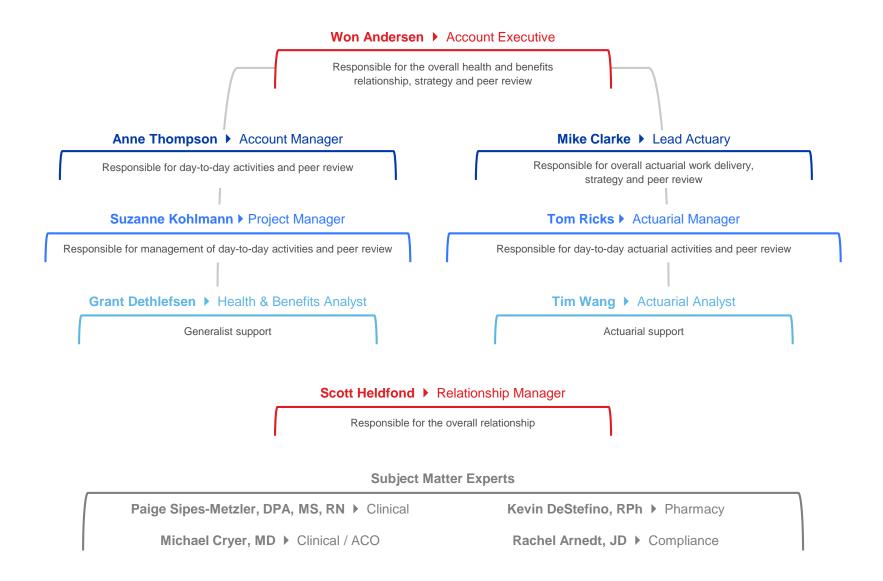
| Value   | Current Model   | Modification  | Measurement  |
|---------|---|---|--|
| Results | <ul> <li>Annual renewal<br/>outcomes have<br/>been below the<br/>industry cost curve<br/>over the past<br/>several years</li> <li>Delivery of cost<br/>effective programs</li> <li>Execution of<br/>renewal strategy</li> <li>Audit support with<br/>positive outcomes</li> </ul> | Continue to<br>leverage data<br>resources through<br>vendor partners<br>and the Truven<br>data warehouse to<br>identify and assess<br>program<br>modifications (as<br>needed) | <ul> <li>Annual client<br/>survey</li> <li>Ongoing<br/>checkpoints with<br/>SFHSS by Lori<br/>Goltermann, Will<br/>Sneden and/or<br/>Won Andersen</li> </ul> |



| Value   | Current and Future Model  | Measurement  |
|---------|---|--|
| Overall | <ul> <li>Full team's commitment to service<br/>excellence, backed by Aon Leadership, to<br/>both the HSB and SFHSS Staff</li> <li>Commitment to improve work process and<br/>efficiencies for SFHSS Staff</li> <li>Commitment to bring well-thought,<br/>innovative ideas that are specific to SFHSS<br/>needs</li> </ul> | <ul> <li>Annual client<br/>survey</li> <li>Ongoing<br/>checkpoints with<br/>SFHSS by Lori<br/>Goltermann, Will<br/>Sneden and/or<br/>Won Andersen</li> <li>Pre and post-<br/>renewal check-<br/>in/debrief with<br/>SFHSS staff</li> </ul> |



#### SFHSS Health Service Board ▶ Aon Service Team



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



| Month                   | Detail  |
|-------------------------|---|
|                         | Prepare stop loss recommendation  |
|                         | Begin to prepare HVI report   |
| February<br>(continued) | Creditable / Non-Creditable Annual Disclosure to Centers for Medicare<br>and Medicaid Services (CMS)—Required for all employers that offer<br>prescription drug coverage and must be submitted 60 days after the<br>beginning of the plan year (2/28) |
| March                   | 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   |



| Month | Detail   |  |
|-------|--|--|
|       | Receive renewal from BSC   |  |
|       | Prepare renewal report non-health carriers (Best Doctors, VSP, Aetna)          |  |
| April | 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 |  |
|       | Receive renewals from Kaiser and UHC for Medicare retiree                      |  |
| Мау   | Prepare Kaiser Medicare benefits and premiums                                  |  |
|       | Prepare UHC Medicare benefits and premiums                                     |  |
|       | Prepare Delta Dental stabilization reserve                                     |  |
|       | Negotiate renewals   |  |



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



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

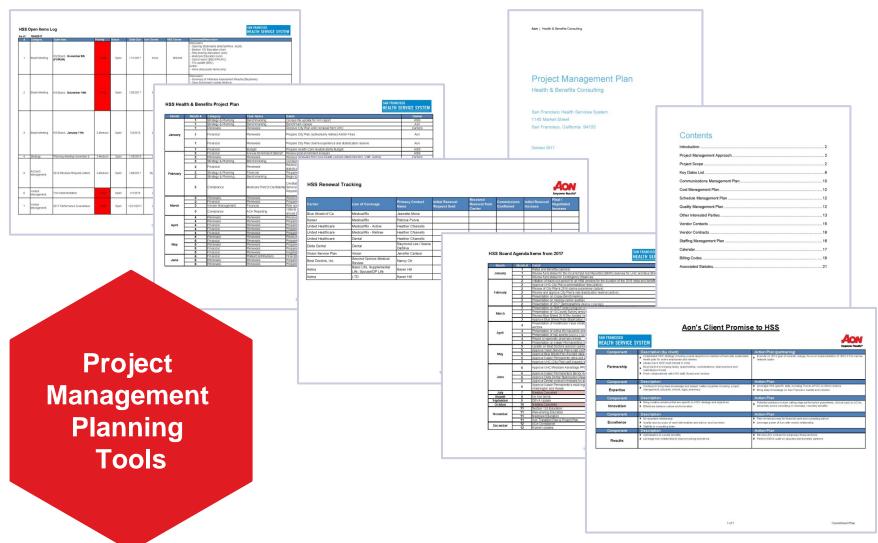


| Month                                    | Detail  |
|--|---|
| Renewal planning and strategy discussion |   |
|  | Request renewals from all carriers (within first 2 weeks of December) |
| December                                 | Prepare rates and contributions calendar                         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



#### Aon Project Management Tools:

#### Delivering excellence to the SFHSS Health Service Board





## In Closing...

- 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!

