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# Covered California

## Small Business Health Options Program (SHOP) Advisory Group

May 14, 2013

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# I. Welcome and Introductions

# Small Business Health Options Program Advisory Group

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**Jeanne Cain**

Executive Vice President, Policy  
California Chamber of Commerce

**David Chase**

California Outreach Director  
Small Business Majority

**Jorge C. Corralejo (Chair)**

Chairman, Founding Member  
Latino Business Chamber of Greater  
Los Angeles

**Virginia Donohue (Vice Chair)**

Small Business Owner  
Pet Camp

**Tana Elizondo**

Insurance Agent  
Central Valley Life & Health Benefits

**Kathleen Hamilton**

Director, Government Affairs  
The Children's Partnership

**Brent Hitchings**

Vice President  
Sales and Account Management  
Blue Shield of California

**Alan Katz**

Executive Vice President  
SeeChange Health

**Emily Lam**

Senior Director  
Healthcare & Federal Issues  
Silicon Valley Leadership Group

**Gohn Marie McFadden**

President and Founder  
McFadden & Associates Insurance

**Mark Morgan**

Vice President and General Manager  
Small Group Business  
Anthem Blue Cross of California

**John Newman**

Executive Director  
California Exchange Operations  
Kaiser Permanente Health Plan

**Carla Saporta**

Policy Director  
Greenlining Institute

**MD Sam Smith**

President Elect of CAHU  
Independent Agent & CAHU

**Micah Weinberg**

Senior Policy Advisor  
Bay Area Council

**Barbara Vohryzek (Ex Officio)**

Small Business Advocate  
California Governor's Office of  
Business and Economic Development

**Covered California Board  
Participants**

Paul Fearer  
Susan Kennedy



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## II. SHOP GO-Live Development

# SHOP Development - Highlights

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1. March 26, 2013: Covered California signed the contract with the SHOP Administrator, Pinnacle Claims Management, Inc.
2. Project Management Services; Quantum; 5/13/13
3. Policy Development
4. Grantee Outreach & Education
5. CalHEERS Requirements and Testing
6. Qualified Health Plans
7. Supplemental Dental & Vision Solicitation

# SHOP Key Dates

Activity	Projected Date
Outreach and Education Grantees Notice of Intent to Award (\$3 million)	May 14, 2013
Grantee Training	July, 2013
CalHEERS User Acceptance Testing	May - October 2013
Agent Training and Certification Begins	August 2013
SHOP Service Center Opens	August 2013
SHOP Roadshows	July 2013 – On-Going
Third Quarter Advisory Group Meeting	August 14, 2013
Open Enrollment Begins	October 1, 2013
Fourth Quarter Advisory Group Meeting	October 16, 2013
Coverage Begins	January 1, 2014

# SHOP Administrator

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March 26, 2013: Covered California signed the contract with the SHOP Administrator, Pinnacle Claims Management, Inc. (PCMI)

## Why Pinnacle?

- Vast experience and market expertise with California small groups
- Demonstrated and scalable systems and infrastructure to support SHOP eligibility and enrollment and other operations needs
- Competitive and sustainable cost bid
- Experienced Sales Leadership to deliver SHOP membership targets
- Established financial management processes that can be leveraged by SHOP
- Marketing: Professional in-house marketing; creative, print and fulfillment of collateral and coordination of events, electronic and social media to effectively recruit agents and promote
- Established Call Center Operations with measured results and performance metrics to deliver best-in-class consumer experience
- Nimble and flexible to meet SHOP needs including technology and training support

# Roles & Responsibilities

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## COVERED CALIFORNIA

- Governance
- Policy
- Health Plan Management
- Corporate Brand
- Corporate Legal

## PINNACLE CLAIMS MANAGEMENT

- Sales
- Eligibility & Enrollment
- Marketing Events & Fulfillment
- Call Center/Customer Support
- Financial Management
- Program Management
- IT: Use CalHEERS; Pinnacle IVR



# Pinnacle Claims Management, Inc. (PCMI)

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David Zanze, President

- Pinnacle Background
- SHOP Scope of Work
- Staffing
- Q&A

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## III. Agent Strategy

# Agent Training & Certification

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- General Agent Status
- Agent Training and Certification
  - Curriculum
  - Approximately 12 hours (includes CalHEERS training)
  - In-person and computer-based training
  - Qualifies for Continuing Education Credits
  - Annual Renewal
  - Training to begin August, 2013

# Collateral and Messaging

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- Grantee draft collateral material under review
- May 15<sup>th</sup> webinar for various Advisory Group Members to review draft collateral
- Focus Groups for key words in our messaging taking place this week
- Pinnacle developing Agent Kit

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## IV. Value Proposition of SHOP

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# Discussion

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# V. Public Comment

# Covered CA - Vision and Mission

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## Vision

The vision of Covered California is to improve the health of all Californians by assuring their access to affordable, high quality care.

## Mission

The mission of the Covered California is to increase the number of insured Californians, improve health care quality, lower costs, and reduce health disparities through an innovative, competitive marketplace that empowers consumers to choose the health plan and providers that give them the best value.





# Covered California's Values

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## **Consumer-focused**

At the center of the Exchange's efforts are the people it serves, including patients and their families, and small business owners and their employees. The Exchange will offer a consumer-friendly experience that is accessible to all Californians, recognizing the diverse cultural, language, economic, educational and health status needs of those we serve.

## **Affordability**

The Exchange will provide affordable health insurance while assuring quality and access.

## **Catalyst**

The Exchange will be a catalyst for change in California's health care system, using its market role to stimulate new strategies for providing high-quality, affordable health care, promoting prevention and wellness, and reducing health disparities.

## **Integrity**

The Exchange will earn the public's trust through its commitment to accountability, responsiveness, transparency, speed, agility, reliability, and cooperation.

## **Partnership**

The Exchange welcomes partnerships, and its efforts will be guided by working with consumers, providers, health plans, employers and other purchasers, government partners, and other stakeholders.

## **Results**

The impact of the Exchange will be measured by its contributions to expanding coverage and access, improving health care quality, promoting better health and health equity, and lowering costs for all Californians.



# Covered California Governance

## Independent Public Entity with Qualified Board

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**Diana Dooley**, Board Chair and Secretary of the California Health and Human Services Agency, which provides a range of health care services, social services, mental health services, alcohol and drug treatment services, income assistance and public health services to Californians

**Kim Belshé**, Senior Policy Advisor of the Public Policy Institute of California, former Secretary of California Health and Human Services Agency, and former Director of the California Department of Health Services

**Paul Fearer**, Senior Executive Vice President and Director of Human Resources of UnionBanCalCorporation and its primary subsidiary, Union Bank N.A., Board Chair of Pacific Business Group on Health, and former board chair of Pacific Health Advantage

**Robert Ross, M.D.**, President and Chief Executive Officer of The California Endowment, previous director of the San Diego County Health and Human Services Agency from 1993 to 2000, and previous Commissioner of Public Health for the City of Philadelphia from 1990 to 1993

**Susan Kennedy**, Nationally-recognized policy consultant, former Deputy Chief of Staff and Cabinet Secretary to Governor Gray Davis, former Chief of Staff to Governor Arnold Schwarzenegger, former Communications Director for U.S. Senator Dianne Feinstein, and former Executive Director of the California Democratic Party



# Foundations of Covered California's Success

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# Commitment to Transparency

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- We are very public:
  - Public Records Act: The Public has the right to inspect and/or obtain copies of public records maintained by Covered California.
  - Assume all emails will be in the LA Times
  - Meetings are public
  - Advisory group discussions – individuals’ comments will NOT be treated as “positions” of the organizations they represent, but press and the public will be at quarterly meetings
- Advisory Group members may be contacted by media organizations, but do not “represent” Covered California
- Covered California may informally reach out to some or all of the Advisory Group for input between meetings.

# Small Business Health Options Program

## Advisory Group Charter

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- **Purpose:** To provide advice and recommendations and serve as a sounding board to Covered California to assist in the continual refinement of policies and strategies to ensure we offer a unique value to small businesses that purchase coverage through SHOP.
- **Scope:** Provide input on strategies to raise interest in the SHOP and ensure that it provides value for small employers.
- **Structure:** Advisory Group members are selected for an initial two-year term and meet quarterly. The SHOP Advisory Chairperson will serve a one-year term.