



**Medicare Product Design Master Class**  
**October 16-17, 2025**  
**San Antonio, TX**

Thursday, October 16, 2025	
8:00 AM – 4:00 PM	Registration Desk Open
8:00 AM – 9:15 AM	Networking Breakfast
8:00 AM – 6:30 PM	Exhibit Hall Open
9:15 AM – 9:20 AM	<b>Welcome and Opening Remarks</b>  <b>Conference Co-Chair:</b> Kaleb Holt, Director of Medicare Products <b>Select Health</b>
9:20 AM – 10:15 AM	<b>Medicare Regulations and the Future of Product Design</b> <ul style="list-style-type: none"><li>• Discuss how to balance regulatory complexity with member-centric innovation</li><li>• Connects the dots across policy and how to lay out a smarter path forward for designing 2027-ready product</li><li>• Outline key areas shaping the MA product design landscape including stricter audits, strategies for enacting V28, changes in Part D and supplemental benefits, and heightened CMS expectations</li></ul> <b>Moderator:</b> Ana Handshuh, <i>Principal</i> <b>Cat5 Strategies</b>  Matt Timm, Principal and Consulting Actuary <b>Milliman</b>  Pamela Laboy, Principal, Consulting Actuary <b>Milliman</b>
10:15 AM – 11:00 AM	<b>Designing Without a Net in the Post-VBID Era</b>

	<ul style="list-style-type: none"> <li>• Hear how leading MA plans are redesigning benefits without VBID flexibility; and leveraging SSBCI, CSNPs, DSNIP, PACE and other core benefit restructuring to maintain market share</li> <li>• Learn how to develop new strategies to remain competitive in Stars, equity, and supplemental benefit offerings</li> <li>• Understand the compliance and documentation expectations that replace the built-in oversight VBID once provided, and what CMS and auditors will now look for in high-touch or targeted benefit design</li> </ul> <p><b>Moderator:</b> Tina Dueringer, BSN, RN, CCM, PCC <b>CEO, Principal Advisor</b></p> <p>Craig W. Fisher, Director, Product Development &amp; Growth Initiatives <b>Jefferson Health Plans</b></p> <p>Katie Lavelle, VP of Sales, Health Plans <b>Medline</b></p>
11:00 AM – 11:25 AM	<i>Networking Break</i>
11:25 AM – 12:05 PM	<p><b>Harnessing AI to Transform Medicare Advantage Plan Design and Operations</b></p> <p>As the Medicare Advantage market grows more competitive and faces increasing financial pressures, success will depend on the ability to design differentiated, cost-effective products and streamline operations. Both generative and traditional AI technologies can play a pivotal role by:</p> <ul style="list-style-type: none"> <li>• Analyzing member and agent interactions to better understand member needs</li> <li>• Evaluating how benefit choices affect enrollment and medical loss ratio (MLR)</li> <li>• Rapidly extracting competitive insights from PBP files and EOC documents</li> <li>• Delivering product intelligence to downstream teams, including sales and member services</li> <li>• Automating the generation and review of multilingual EOCs, ANOCs, and Summary of Benefits documents</li> </ul> <p>Harbinder Raina, Partner, Leader of Government Markets Center of Excellence <b>ZS</b></p> <p>Monica Pagels, Director of MA Product <b>BCBSM</b></p>
12:05 PM – 12:20 PM	<p><b>Tools and Tech</b></p> <p><i>Leading service providers will showcase their offerings in a quick-pitch setting. Evaluate the latest and greatest tech tools to bring back to your organization.</i></p>

	<p><i>Alexander Timm, Associate Director, Product Management - Health Plans &amp; Geek Squad Health</i>  <b>Best Buy Health</b></p>
12:20 PM – 1:20 PM	<i>Networking Lunch</i>
1:20 PM – 2:10 PM	<p><b>Turning Member Insights into Smarter Products, Better Experience and Sustainable Revenue</b></p> <ul style="list-style-type: none"> <li>• Learn how to use clinical, behavioral, and demographic data to tailor benefits and communications for high-need populations like members with diabetes, heart failure, or dual eligibility</li> <li>• Discover how member experience data can reshape product design by identifying friction points, reducing grievances, and improving clarity in member materials and onboarding</li> <li>• Identify when product misalignment is quietly costing your plan Stars, satisfaction, and accurate risk capture</li> </ul> <p><b>Moderator:</b>  Melissa Smith, Founder  <b>Newton Smith</b></p> <p>Jason Montrie, Executive Vice President  <b>NationsBenefits</b></p> <p>Jason Hellinger, Sr. Strategic Product Manager, Medicare Solutions  <b>Health Care Service Corporation (HCSC)</b></p>
2:10 PM – 3:00 PM	<p><b>Designing Supplemental Benefits That Empower the Aging Population and Deliver Results</b></p> <ul style="list-style-type: none"> <li>• Leverage non-medical interventions, including SSBCI, to help seniors age in place and maintain independence</li> <li>• Prioritize holistic benefit design that addresses social drivers of health and produces measurable outcomes (e.g., reduced ER visits, improved A1C)</li> <li>• Align CMS Part C reporting with empowered aging goals to enhance Stars, product performance, and member retention</li> <li>• Build vendor partnerships and data strategies that support seamless implementation, compliance, and ROI tracking</li> </ul> <p>Andy Friedell, COO  <b>The Helper Bees</b></p> <p>Kaitlin Mayhew, Senior Director, Product Development  <b>Curana Health Plans / Align Senior Care</b></p>

3:00 PM – 3:20 PM	<i>Networking Break</i>
3:20 PM – 4:05 PM	<p><b>Learn Strategies to Pivot, Calibrate and Reposition your Plan's Offerings</b></p> <ul style="list-style-type: none"> <li>• Review utilization and enrollment data to take a deep dive into the profitability state of your benefits and decide which ones to keep</li> <li>• Hear best practices to help you reshape benefits based on market intelligence and update your strategy, along with internal measures to support changes</li> <li>• Can your benefits withstand scrutiny to ensure they bring high value at a reasonable cost?</li> <li>• Are you a follower or a leader in your market? Discuss benefits and setbacks</li> </ul> <p>Moderator: Nick Cartossa, Consulting Actuary II <b>Wakely</b></p> <p>Sion Hughes, Senior Consultant <b>Wakely</b></p> <p>Ana Handshuh, <i>Principal</i> <b>Cat5 Strategies</b></p> <p>Abby Katarbaro, Managing Director, Medicare Product <b>BCBSM</b></p>
4:05 PM – 4:50 PM	<p><b>Designing for Aging Populations, Growth and Efficiency</b></p> <ul style="list-style-type: none"> <li>• Explore strategies to evolve your plan design as members age, shift risk profiles, or move across population segments, and when segmentation (e.g., younger duals vs. aging boomers) makes more sense than a one-size-fits-all approach</li> <li>• Discuss how to preserve value for older members while staying attractive and sustainable for younger enrollees</li> <li>• Discover cost containment tactics and streamlining like offshoring, workflow automation, and operational redesign, and how to manage the downstream effects of scaling services without losing quality or compliance</li> <li>• Address the discontinuation of mandatory mid-year notices and the resulting need for proactive communication strategies to safeguard member trust, protect Star ratings, and reduce call center load and grievances heading into 2027</li> </ul> <p>Moderator: Kaleb Holt, Director of Medicare Products <b>Select Health</b></p> <p>Dr. Shannon Decker, Principal <b>VBC One</b></p>

	<p>Carrie Meyer, Au.D., Director of Clinical Programs <b>Amplifon Hearing Health Care</b></p>
4:50 PM – 5:05 PM	<p><b><i>Tools and Tech</i></b></p> <p>Leading service providers will showcase their offerings in a quick-pitch setting. Evaluate the latest and greatest tech tools to bring back to your organization.</p> <p>Austin Weaver, Senior Vice President, Healthcare Strategy <b>Papa</b></p>
5:05 PM – 5:10 PM	<p><b>Closing Remarks</b></p> <p><b>Conference Co-Chair:</b> Kaleb Holt, Director of Medicare Products <b>Select Health</b></p>
5:00 PM – 6:00 PM	<p><b>Networking Cocktail Reception</b> Join us for drinks, hors d'oeuvres, and face-to-face networking with peers.</p>

Friday, October 17	
8:00 AM – 11:00 AM	<i>Registration Desk Open</i>
8:00 AM – 9:00 AM	<i>Networking Breakfast</i>
8:00 AM – 12:50 PM	<i>Exhibit Hall Open</i>
9:00 AM – 9:10 AM	<p><b>Welcome Remarks and Day One Takeaways</b></p> <p><b>Conference Co-Chair:</b> Kaleb Holt, Director of Medicare Products <b>Select Health</b></p>
9:10 AM – 10:00 AM	<p><b>Hot Topic: Pharmacy Reform and Impact on Health Plans</b></p> <ul style="list-style-type: none"> <li>• Discuss the 10 high-impact drugs subject to 2026 price negotiation, and how lower member costs will shift plan strategy, pharmacy network dynamics, and benefit messaging</li> <li>• Understand the financial and operational impact of rebate reallocation and delayed payments on retail pharmacies, and what plans can do to maintain trust and avoid network disruption</li> <li>• Learn how to educate members on formulary changes, prior auth realities, and access issues, while staying compliant and member-centered</li> </ul>

	<p>Moderator: Laura Sheriff, RN, MSN, CPC, CRC Healthcare Expert</p> <p>Omar Daoud, <i>Senior Director of Pharmacy</i> <b>Community Health Plan of Washington</b></p> <p>Liz Lopez Cepero, SVP, Chief Growth Officer <b>Baylor Scott &amp; White Health Plan</b></p>
10:00 AM – 10:45 AM	<p><b>Preparing Vendors for the New Era of Technology and Reporting</b></p> <ul style="list-style-type: none"> <li>• Walk away with a vendor-readiness checklist to help ensure your partners can meet today's audit and reporting expectations, without slowing down innovation</li> <li>• Learn how to turn compliance requirements into a competitive advantage by aligning vendors and internal teams around clear audit-proof workflows and documentation</li> <li>• Gain practical tactics to modernize legacy systems and paper-based processes, especially with smaller providers, so your plan can withstand 7-year lookbacks and stricter CMS scrutiny</li> </ul> <p>Moderator: Abby Katabaro, Managing Director, Medicare Product <b>BCBSM</b></p> <p>Jake Mead, CEO and Lead Advisor <b>Impact Sales Partners</b></p> <p>Jenni Mauro, Director, Medicare Product <b>Gold Kidney Health Plan</b></p> <p>Liz Lopez Cepero, SVP, Chief Growth Officer <b>Baylor Scott &amp; White Health Plan</b></p> <p>Monica Pagels, Director of MA Product <b>BCBSM</b></p>
10:45 AM – 11:05 AM	<i>Networking Break</i>
11:05 AM – 11:50 AM	<p><b>Get a Reality Check and a Roadmap: See your Products as Your Members Do (and Redesign Accordingly)</b></p> <p>Hear directly from Medicare Advantage members as they share their unfiltered experiences navigating plan benefits, digital tools, and provider access. This is your chance to understand how your product design decisions are felt—emotionally and practically—by the people you serve.</p>

	<ul style="list-style-type: none"> <li>• Learn what builds or breaks trust when members interact with coverage rules, supplemental benefits, wellness programs, and support tools</li> <li>• Discover where design disconnects occur, from confusing plan materials to poorly aligned benefits or inaccessible member portals</li> <li>• Walk away with design-level insights to improve simplicity, clarity, equity, and value perception in your 2026 product portfolio</li> </ul> <p><b>Moderator:</b> Melissa Smith, Founder <b>Newton Smith</b></p> <p><b>Patient Advocate Panelists:</b> Nohora Gutierrez Amanda Rice Cynthia Gibbs-Daniels</p>
11:50 AM – 12:50 PM	<i>Networking Lunch</i>
12:50 PM – 1:40 PM	<p><b>Designing Forward: Lessons Learned and a Practical Playbook for 2026 and Beyond</b></p> <ul style="list-style-type: none"> <li>• Reflect on lessons learned from 2025 to identify what's working and what needs to change for the year ahead</li> <li>• Explore the top trends that will shape Medicare product strategy in years to come</li> <li>• Walk away with a toolkit to guide your team's next phase of innovation and compliance</li> </ul> <p>Moderator: Laura Sheriff, RN, MSN, CPC, CRC Healthcare Expert</p> <p>Dr. Shannon Decker, Principal <b>VBC One</b></p> <p>Jake Mead, CEO and Lead Advisor <b>Impact Sales Partners</b></p>
1:40 PM – 2:00 PM	<p><b>Closing Remarks</b></p> <p><b>Conference Co-Chair:</b> Kaleb Holt, Director of Medicare Products <b>Select Health</b></p>