



Partnering for Electronic Delivery
of Information in Healthcare

**WEDI HEALTH SAVINGS ACCOUNTS FORUM
AUGUST 23-24, 2007
HYATT FAIR LAKES
FAIRFAX, VA**

**AGENDA
Updated 8.08.07**

This program will be a full day on August 23 and half day on August 24.

THURSDAY, AUGUST 23, 2007

7:30 AM - 8:30 AM

Registration (includes continental breakfast)

8:30 AM - 9:00 AM

Introduction in setting the stage for the work of the next day and a half

Brief overview of WEDI, the HSA Task Group, and the activities of the two subworkgroups; education and business process. This session will outline the goals for the day and a half program and prepare the participants to participate in the development of a consensus on the HSA/HDHP business process models. The new challenges that HSAs pose to providers, health plans, employers and financial institutions and the WEDI path to addressing them are discussed.

Speakers:

Steven Lazarus, Boundary Information Group

Pam Stenman, Aetna

9:00 AM - 10:15 AM

Consumer-directed products integrating financial components into health care products

The two critical components of consumer directed health care are the creation of consumer tools to provide information and make decisions for treatment services and payment, and creating and implementing an operational infrastructure that supports the business needs of the providers, health plans, financial institutions, and employers. The challenges across the components are discussed and a real solution utilizing a multi purpose card is presented as an example of how to meet the business needs of all of the participants.

Speakers:

Robyn Bartlett-Andersen, First Data
Ben Morris, UMB Bank

10:15 AM - 10:30 AM***Break*****10:30 AM - 12:00 PM*****Presentation and facilitated discussion of the WEDI HSA/HDHP business models***

The WEDI HSA Task Group has developed business process models describing the various scenarios of health plan financial responsibility, patient financial responsibility, a provider (administrative) responsibility, and the various combinations which occur in the High Deductible Health Plan with tax-advantaged account payment mechanisms. Each of the business process models are described with workflow diagrams. The participants will actively engage in a facilitated discussion to reach a consensus that these are the business models for the consumer directed health care environment. These models will then become the basis for designing tools, modifying vendor software, changing workflow within the participating organizations and developing educational materials for all parties in order to have an efficient and effective billing and collection strategy for the consumer, provider, health plan, and tax-advantaged account administrators.

Speakers:

WEDI HSA Business Process subworkgroup co-chairs:
Laurie Darst, Mayo Clinic
Pam Stenman, Aetna

12:00 PM - 1:15 PM***Lunch*****1:00 PM - 2:30 PM*****Continue discussion and consensus building on the business process models*****2:30 pm to 2:45 pm*****Break*****2:45 PM - 4:00 PM*****Mitigating CDH Risk Through Real Time Payments: A MBProject Pilot Program.***

The Medical Banking Project (MBProject) is leading the way for financial service companies to move health care transactions to the next paradigm via real-time payment processing, real-time clinical data exchanges and the convergence of these areas with a web/card based platform leveraging banking systems. Learn how MBProject's HSA Workgroup designed its first use case around healthcare payments and how it nearly fell into the trap of "real-time" adjudication. Discussion topics include: 1.) High level overview of the HDHP Deductible Accumulator,

2.) Lessons learned and why less is more, 3.) Use case actors and pilot participants and 4.) Future pathways.

Speakers:

*David Harris, MBProject HSA Workgroup Leader; Partner, PricewaterhouseCoopers
Doug Spence, MBProject Director of C.O.M.B.A.T. Initiative; Executive Vice President,
Foresight Corporation*

4:00 PM - 5:15 PM

A comparison of the legal, business process, and information flows of the tax-advantaged accounts (HSA, FSA, MSA, and HRA). The HSA Education subworkgroup members.

Congress has passed several laws that have enabled a variety of tax-advantaged accounts concerning consumer healthcare payments. This discussion describes the key characteristics of each and their potential fit into common business process models from a patient, provider, health plan, and tax-advantaged account administrator perspective. Some of these accounts require a High Deductible Health Plan whereas others do not. Some have employee ownership of funds once deposited whereas others have a use it within the calendar year or lose it requirement. These and other distinguishing characteristics are examined as they impact these processes.

Speaker:

Barbara Else, First Data

FRIDAY, AUGUST 24, 2007

7:30 AM - 8:30 AM

Breakfast

8:30 AM - 9:45 AM

Industry scan on HDHP/HSA knowledge and implications for improved business process (survey results)

WEDI is conducting its first survey to scan the industry's knowledge and concern about High Deductible Health Plans and Health Savings Accounts. Findings from this survey will be presented and discussed. These findings are expected to have an impact on future education programs, tool design and prioritization, and provide a basis for the work of WEDI and other organizations in the tax-advantaged account arena.

Speakers:

*Steve Lazarus, Boundary Information Group
TBD*

9:45 AM - 10:00AM

Break

10:00 AM – 12:00 PM

Identification of tools, transaction enhancements and business needs; and the WEDI HSA Forum's next steps

Several tools have been suggested to promote health care transparency to the consumer or provide providers and others with better, timely information. This participant discussion session examines the tools, transaction enhancements, and business needs that are needed to support the various identified business process models. The results of this discussion will be utilized to prioritize the WEDI HSA Forum's future work on describing and promoting the mechanisms that are needed to support the business processes defined.

Active discussion with all participants

Speakers:

Laurie Darst, Mayo Clinic

Pam Stenman, Aetna

12:00 PM

Adjourn