

CMCS Informational Bulletin

DATE: July 24, 2015

FROM: Vikki Wachino
Director, Center for Medicaid and CHIP Services

Patrick Conway
Deputy Administrator for Innovation & Quality, CMS Chief Medical Officer

Tim Engelhardt
Acting Director, Medicare-Medicaid Coordination Office

Jackie Garner
Administrator, Consortium for Medicaid and Children's Health Operations

SUBJECT: Establishing "SOTA 2.0" as a Coordinated Point of Contact for States

States, as well as the National Association of Medicaid Directors (NAMD) and the National Governors Association (NGA), have suggested that the Centers for Medicare & Medicaid Services (CMS) improve its Medicaid-related intra-agency and interagency communication. The purpose of this Informational Bulletin is to update states and our partners about CMS' efforts to improve communication and coordination by creating a coordinated point of contact for states within the Center for Medicaid and CHIP Services (CMCS).

This new approach, "SOTA 2.0," expands the scope of CMCS' existing State Operations and Technical Assistance (SOTA) teams to encompass each state's Medicaid-related work across CMS. This will establish for each state a central point of contact that coordinates and tracks Medicaid issues within CMCS and with the Center for Medicare and Medicaid Innovation (CMMI), the Medicare-Medicaid Coordination Office (MMCO), the Center for Consumer Information and Insurance Oversight (CCIIO), and the Center for Program Integrity (CPI).

SOTA 2.0's goal is to provide a smoother and more efficient experience for states when working across CMS on Medicaid-related issues. By creating a team that will organize itself around a state and can be accountable to them, we believe that the new SOTA 2.0 structure will provide states a more seamless experience for states as they work with CMS.

In spring 2012, the SOTA initiative was created to work through policy and operational changes required in Medicaid by the Affordable Care Act. The multidisciplinary SOTA teams worked to address questions from and disseminate information to states. CMS is building on this successful process and expanding the scope of the issues that these teams address by establishing SOTA 2.0.

SOTA 2.0 teams, which will be co-led by central and regional office staff, will be responsible for coordinating, tracking, and monitoring progress on Medicaid-related issues between states and CMS. SOTA 2.0 will also serve as a vehicle to disseminate outcomes from the Medicaid Innovation Accelerator Program (IAP) and Medicaid and CHIP Learning Collaboratives. States can expect that SOTA 2.0 co-leads are aware of major pieces of business (waiver renewals, State Innovation Model (SIM) activities, and demonstrations to integrate care for dual eligible beneficiaries) that each state has at CMS and identifying relationships between them.

SOTA 2.0 can be used as a state's first point of contact when trying to navigate or obtain CMS assistance on broad delivery system reform efforts. It can also serve as an entry point to CMS when a new or undefined topic arises.

Standing SOTA calls can still be used for ongoing eligibility and enrollment issues but also to touch base and share information about other topics as well. SOTA 2.0 co-leads can also arrange for subject matter experts to attend SOTA standing calls if a state would like a deep dive on a particular subject. This will be particularly useful for states on issues that cut across multiple CMCS components and other federal agencies such as the Centers for Disease Control (CDC).

Each state will have SOTA 2.0 co-leads – one person from the CMS Central Office and one person from the local CMS Regional Office. The day-to-day responsibilities of the SOTA 2.0 co-leads will be to:

- Coordinate on behalf of states, and be accountable to them;
- Coordinate among CMCS and other CMS components and, when appropriate, participate in interagency discussions regarding state issues; and
- Coordinate CMCS “ownership” of issues.

In short, SOTA 2.0 can be considered a “hub” and a resource of information and communication as it relates to Medicaid-related state issues at CMS.

Below are examples of when states might reach out to their SOTA 2.0 co-leads as a first contact:

- A state is interested in understanding the federal authority issues involved with establishing a shared savings or pay for performance initiative; or is interested in obtaining technical assistance to do so.
- Exploration of multifaceted Medicaid initiatives that may involve several CMS components;
- Medicaid expansion efforts; and
- Proposals that do not fit into a single Medicaid authority or could be executed under multiple authorities.

SOTA 2.0 will not replace day-to-day program management needs and requirements, such as state plan amendment submissions or grant reporting. Likewise, states with SIM grants should continue to consider SIM project officers as their primary contacts for SIM-related technical assistance needs, and states with Medicare-Medicaid financial alignment model demonstrations will continue to have a dedicated state lead within MMCO.

Attached is a list of the SOTA 2.0 co-leads for each state. Additional members of the SOTA team will fluctuate based on state needs but might include staff from other CMCS components, CCIIO, CMMI, MMCO, and CPI as needed.

For questions or more information about SOTA 2.0 efforts, please contact Carol Backstrom at carol.backstrom@cms.hhs.gov.

List of SOTA 2.0 Co-Leads

Robin Preston (robin.preston@cms.hhs.gov), Division Director, State and Stakeholder Relations
 Verlon Johnson (verlon.johnson@cms.hhs.gov), Regional Director, Consortium for Medicaid & Children's Health Insurance Program

State	Regional Office Lead	Central Office Lead
Alabama	Alice Hogan Alice.Hogan@cms.hhs.gov	Iris Allen Iris.Allen@cms.hhs.gov
Alaska	Treva Wornath Treva.Wornath@cms.hhs.gov	Jason Berry Jason.Berry@cms.hhs.gov
American Samoa	Peter Banks Peter.Banks@cms.hhs.gov	Audrey Cassidy / Tanya Pulley Audrey.Cassidy@cms.hhs.gov / Tanya.Pulley@cms.hhs.gov
Arizona	Brian Zolynas Brian.Zolynas@cms.hhs.gov	Audrey Cassidy Audrey.Cassidy@cms.hhs.gov
Arkansas	Lynn Ward Lynn.Ward@cms.hhs.gov	Jason Berry Jason.Berry@cms.hhs.gov
California	Cheryl Young Cheryl.Young@cms.hhs.gov	Audrey Cassidy Audrey.Cassidy@cms.hhs.gov
Colorado	Curtis Volesky/Trinia Hunt/ Carl Piekarski Curtis.Volesky@cms.hhs.gov / Trinia.Hunt@cms.hhs.gov / Carl.Piekarski@cms.hhs.gov	Lisa Jones/Falecia Smith Lisa.Jones@cms.hhs.gov / Falecia.Smith@cms.hhs.gov
Connecticut	Marie DiMartino Marie.DiMartino@cms.hhs.gov	Lisa Jones/Tanya Pulley Lisa.Jones@cms.hhs.gov / Tanya.Pulley@cms.hhs.gov
Delaware	Mike Cleary Michael.Cleary@cms.hhs.gov	Ethan Moore Ethan.Moore@cms.hhs.gov
District of Columbia	Alice Robinson-Penn Alice.Robinson-Pin@cms.hhs.gov	Ethan Moore Ethan.Moore@cms.hhs.gov
Florida	Etta Hawkins Etta.Hawkins@cms.hhs.gov	Iris Allen Iris.Allen@cms.hhs.gov
Georgia	Tandra Hodges Tandra.Hodges@cms.hhs.gov	Iris Allen Iris.Allen@cms.hhs.gov
Guam	Peter Banks Peter.Banks@cms.hhs.gov	Audrey Cassidy Audrey.Cassidy@cms.hhs.gov
Hawaii	Christy Bonstelle Christly.Bonstelle@cms.hhs.gov	Audrey Cassidy Audrey.Cassidy@cms.hhs.gov
Idaho	Tom Couch Thomas.Couch@cms.hhs.gov	Jason Berry Jason.Berry@cms.hhs.gov
Illinois	Courtenay Savage Courtenay.Savage@cms.hhs.gov	Renee Frandson/Falecia Smith Renee.Frandson@cms.hhs.gov / Falecia.Smith@cms.hhs.gov

State	Regional Office Lead	Central Office Lead
Indiana	Elizabeth Lewis Elizabeth.Lewis@cms.hhs.gov	Renee Frandson/Falecia Smith Renee.Frandson@cms.hhs.gov / Falecia.Smith@cms.hhs.gov
Iowa	Sandra Levels Sandra.Levels@cms.hhs.gov	Tanya Pulley Tanya.Pulley@cms.hhs.gov
Kansas	Karen Hatcher Karen.Hatcher@cms.hhs.gov	Tanya Pulley Tanya.Pulley@cms.hhs.gov
Kentucky	Melanie Benning Melanie.Benning@cms.hhs.gov	Iris Allen Iris.Allen@cms.hhs.gov
Louisiana	Ford Blunt Ford.Blunt@cms.hhs.gov	Jason Berry Jason.Berry@cms.hhs.gov
Maine	Aimee Campbell-O'Connor Aimee.Campbell- O'Connor@cms.hhs.gov	Lisa Jones/Tanya Pulley Lisa.Jones@cms.hhs.gov / Tanya.Pulley@cms.hhs.gov
Maryland	Andrea Cunningham Andrea.Cunningham@cms.hhs.gov	Ethan Moore Ethan.Moore@cms.hhs.gov
Massachusetts	Julie McCarthy Julie.McCarthy@cms.hhs.gov	Lisa Jones/Tanya Pulley Lisa.Jones@cms.hhs.gov / Tanya.Pulley@cms.hhs.gov
Michigan	Leslie Campbell Leslie.Campbell@cms.hhs.gov	Renee Frandson/Falecia Smith Renee.Frandson@cms.hhs.gov / Falecia.Smith@cms.hhs.gov
Minnesota	Sandra Porter Sandra.Porter@cms.hhs.gov	Renee Frandson/Falecia Smith Renee.Frandson@cms.hhs.gov / Falecia.Smith@cms.hhs.gov
Mississippi	Tandra Hodges Tandra.Hodges@cms.hhs.gov	Iris Allen Iris.Allen@cms.hhs.gov
Missouri	Deborah Read Deborah.Read@cms.hhs.gov	Tanya Pulley Tanya.Pulley@cms.hhs.gov
Montana	Cindy Smith Cindy.Smith@cms.hhs.gov	Ethan Moore Ethan.Moore@cms.hhs.gov
N. Mariana Islands	Peter Banks Peter.Banks@cms.hhs.gov	Tanya Pulley Tanya.Pulley@cms.hhs.gov
Nebraska	Benton Williams Benton.Williams@cms.hhs.gov	Tanya Pulley Tanya.Pulley@cms.hhs.gov
Nevada	Peter Banks Peter.Banks@cms.hhs.gov	Audrey Cassidy Audrey Cassidy Audrey.Cassidy@cms.hhs.gov
New Hampshire	Joyce Butterworth Joyce.Butterworth@cms.hhs.gov	Lisa Jones/Robin Preston Lisa.Jones@cms.hhs.gov / Robin.Preston@cms.hhs.gov
New Jersey	Nicole McKnight Nicole.McKnight@cms.hhs.gov	Audrey Cassidy Audrey.Cassidy@cms.hhs.gov
New Mexico	Stacey Shuman Stacey.Shuman@cms.hhs.gov	Jason Berry Jason.Berry@cms.hhs.gov

State	Regional Office Lead	Central Office Lead
New York	Nicole McKnight Nicole.McKnight@cms.hhs.gov	Audrey Cassidy Audrey.Cassidy@cms.hhs.gov
North Carolina	Elaine Elmore Elaine.Elmore@cms.hhs.gov	Iris Allen Iris.Allen@cms.hhs.gov
North Dakota	Kristin Michel Kristin.Michel@cms.hhs.gov	Ethan Moore Ethan.Moore@cms.hhs.gov
Ohio	Christine Davidson Christine.Davidson@cms.hhs.gov	Renee Frandson/Falecia Smith Renee.Frandson@cms.hhs.gov / Falecia.Smith@cms.hhs.gov
Oklahoma	Suzette Seng Suzette.Seng@cms.hhs.gov	Jason Berry Jason Berry Jason.Berry@cms.hhs.gov
Oregon	Gary Ashby Gary.Ashby@cms.hhs.gov	Jason Berry Jason Berry Jason.Berry@cms.hhs.gov
Pennsylvania	Mary McKeon Mary.McKeon@cms.hhs.gov	Ethan Moore Ethan Moore Ethan.Moore@cms.hhs.gov
Puerto Rico	Ivelisse Salce Ivelisse.Salce@cms.hhs.gov	Audrey Cassidy/Tanya Pulley Audrey.Cassidy@cms.hhs.gov / Tanya.Pulley@cms.hhs.gov
Rhode Island	Lynn DelVecchio Lynn.Delvecchio@cms.hhs.gov	Lisa Jones/Robin Preston Lisa.Jones@cms.hhs.gov / Robin.Preston@cms.hhs.gov
South Carolina	Maria Drake Maria.Drake@cms.hhs.gov	Iris Allen Iris.Allen@cms.hhs.gov
South Dakota	Laurie Jensen Laurie.Jensen@cms.hhs.gov	Ethan Moore Ethan.Moore@cms.hhs.gov
Tennessee	Kenni Howard Kenni.Howard@cms.hhs.gov	Iris Allen Iris.Allen@cms.hhs.gov
Texas	Cheryl Rupley Cheryl.Rupley@cms.hhs.gov	Jason Berry Jason Berry Jason.Berry@cms.hhs.gov
US Virgin Islands	Ivelisse Salce Ivelisse.Salce@cms.hhs.gov	Audrey Cassidy/Tanya Pulley Audrey.Cassidy@cms.hhs.gov /Tanya.Pulley@cms.hhs.gov
Utah	Mandy Strom Mandy.Strom@cms.hhs.gov	Lisa Jones/Falecia Smith Lisa.Jones@cms.hhs.gov / Falecia.Smith@cms.hhs.gov
Vermont	Tom Schenck Tom.Schenck@cms.hhs.gov	Lisa Jones/Tanya Pulley Lisa.Jones@cms.hhs.gov / Tanya.Pulley@cms.hhs.gov
Virginia	Peggi Koshherzenko Margaret.Koshherzenko@cms.hhs.gov	Ethan Moore Ethan.Moore@cms.hhs.gov
Washington	Rick Dawson Rick.Dawson@cms.hhs.gov	Jason Berry Jason.Berry@cms.hhs.gov
West Virginia	Peggi Koshherzenko Margaret.Koshherzenko@cms.hhs.gov	Ethan Moore Ethan.Moore@cms.hhs.gov

State	Regional Office Lead	Central Office Lead
Wisconsin	Charles Friedrich Charles.Friedrich@cms.hhs.gov	Renee Frandson/Falecia Smith Renee.Frandson@cms.hhs.gov / Falecia.Smith@cms.hhs.gov
Wyoming	Cindy Riddle Cynthia.Riddle@cms.hhs.gov	Lisa Jones/Falecia Smith Lisa.Jones@cms.hhs.gov / Falecia.Smith@cms.hhs.gov