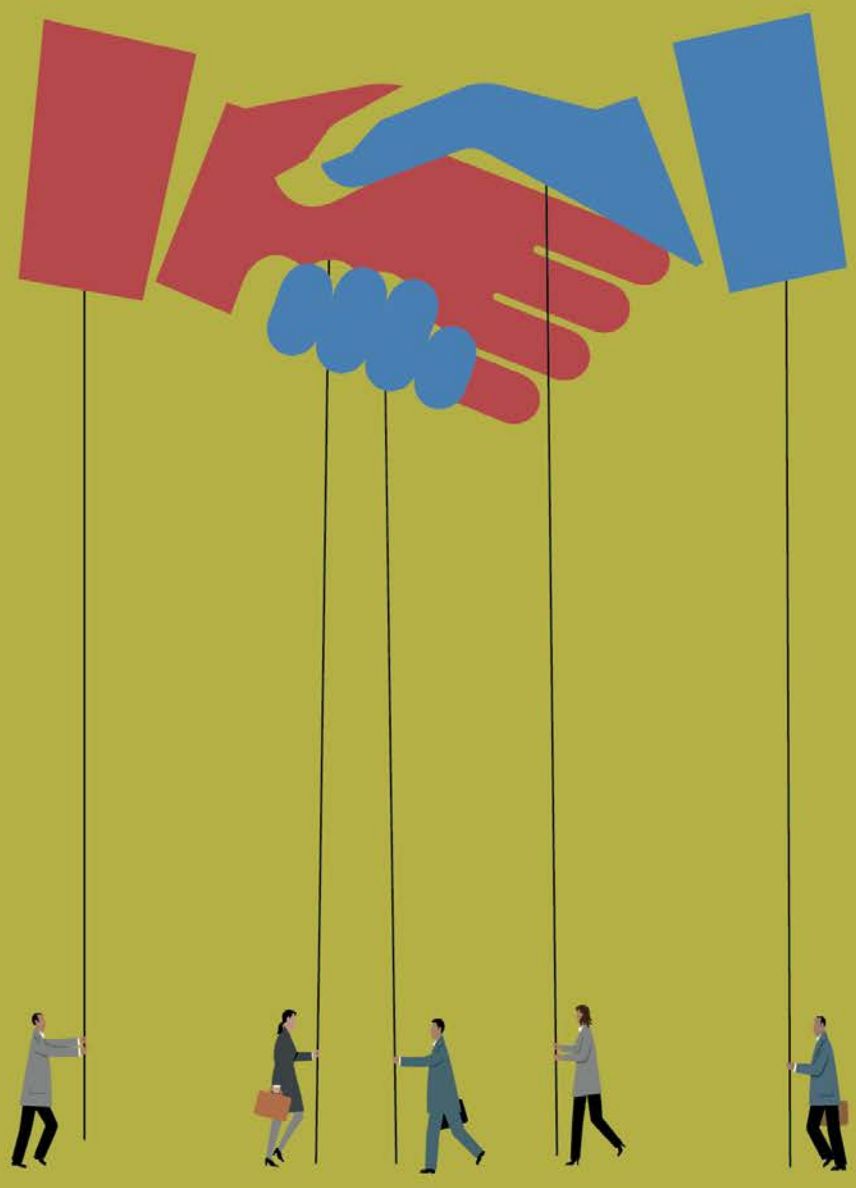
Tennessee HFMA Presents

Relationships Matter

Uniting the Professionals Behind Healthcare



The Spring Institute

May 20-22, 2013 in Nashville, TN

thespringinstitute.org

WELCOME FROM THE CHAPTER PRESIDENT

Welcome members, non-members, and guests to the 2013 TNHFMA Spring Institute. A staple of the chapter's educational opportunities, the Institute offers a wide range of dynamic speakers for your consideration as well as the prospect of networking with your peers at various social venues. Each year the chapter's Spring Institute Planning Committee spends countless hours developing the model for the event as well as planning for contingencies and attention to every detail. Please take a moment to share your thoughts and thanks with the Committee members as your paths cross throughout the event. Highlight of the Institute is the installation of the officers for 2013-14 and I encourage all to be present for the installation with the National HFMA CEO Joe Fifer at Tuesday's installation luncheon. Welcome, Joe, to our Volunteer State! Additional highlight of the Spring Institute is the annual Gloria Adams Scholarship Fund Golf Tournament. The tournament allows your chapter to provide financial aid thru the Scholarship Fund for high school and college students and if you are aware of an individual that may qualify for the Scholarship, please direct them to our website, www.tnhfma.org, for information on qualifications and application deadlines.

I would like to share a special thanks to all the Committee members involved with the organization of this event, all the chapter's corporate sponsors (please don't forget the Sponsor Appreciation luncheon following the closure of the Institute on Wednesday), and especially the chapter leaders for their yearlong commitment to the success of our chapter.

Carpe diem!

Marc Carter
2012/2013 TNHFMA President

Committee Members

Guice Smith (Co-Chair)
ThinkingAhead Executive Search

Paul Bolin
Williamson Medical Center

Lee Ann Burney
Maury Regional Medical Center

Martha Calfee
Matheney Stees & Associates

Marc Carter
CBC

Phyliss Casey
QHR

Shawn Clark
Credit Solutions

Gayle Culpepper
Dell Services

Merle Glasgow
ARx

Mike Johns
QHR

Buffy Loveday
Emdeon

Cynthia McBride
McKesson

Patrick Miller
Professional Recovery Consultants

Jennifer Mitchell
Parallon Business Solutions

Chad Preston
Avectus Healthcare Solutions, LLC

Charlie Solomon
Vanderbilt University Medical Center

Amy Totty
Healthcare Receivables Group

Carmen Voelz
Optum

Brad Adams (Co-Chair)
Vanderbilt University Medical Center

Summer Brown
McKesson

David Burtchfield
University of Memphis

Mark Cameron
RevenueVantage

Rosiland Carter
Unified Health Services

Dawn Cashion
Maury Regional Medical Center

Susan Cobb
PNC Healthcare

Julie Cummings
HCA

Brandon Harrison
Southeast Reimbursement Group, LLC.

Linda Knight

Bill Matheny
Matheney Stees & Associates

Kelly Miller
Lattimore Black Morgan & Cain

Tina Minnick
Press Ganey

Logan Pigg
Mountain States Health Alliance

Michael Sizemore
Obsidian Solutions

Jess Stewart
ARx

Jonathan Uttz
Kraft Healthcare Consulting

Schedule at a Glance

Sunday – May 19

4:00 p.m. – 6:00 p.m.	Registration
5:30 p.m.– 7:00 p.m.	Sunday Night Reception and Trivia Contest
7:00 p.m.	Dinner on Your Own

Monday – May 20

7:30 a.m. – 12:30 p.m.	Golf Tournament at the Vanderbilt Legends Club – Benefiting the Gloria Adams Memorial Scholarship Fund
7:30 a.m. - 8:00 a.m.	Breakfast
8:00 a.m.– 5:00 p.m.	Healthcare Finance Basics – Dr. Michael Nowicki, FACHE, FHFMA
11:00 a.m. – 5:00 p.m.	Registration
12:00 p.m. – 1:00 p.m.	Lunch – TNHFMA Overview
1:00 p.m. – 2:40 p.m.	Concurrent Sessions · Working Together: Effective Ways to Build Successful Teams – Jerry Teplitz, JD, Ph.D, CSP · CPA Ethics – Jim Myers, CPA · Healthcare FASB Update - Meredith Douglas, CPA and Brian Tate, CPA
2:40 p.m. – 3:00 p.m.	Break
3:00 p.m. – 4:40 p.m.	Concurrent Sessions · Managing the Stress of Change - Jerry Teplitz, JD, Ph.D, CSP · CPA Ethics – Jim Myers, CPA (repeat of previous session) · Healthcare FASB Update - Meredith Douglas, CPA and Brian Tate, CPA (repeat of previous session)
5:00 p.m. – 6:30 p.m.	Sponsors Reception

Tuesday – May 21

7:00 a.m. - 8:00 a.m.	Breakfast Board Meeting
8:00 - 9:30	Opening Session: HFMA National Update: Thriving Amidst Reform – President Joe Fifer, FHFMA, CPA
9:30 – 9:45	Break

9:45 - 11:00	Concurrent Sessions
	· TennCare Update – Wendy J. Long, M.D., M.P.H.
	· Securing the Benefits of Lean Implementation – Andrew Wampler & Logan Pigg
	· Patient Receivable Segmentation – Steve Hovan
11:00 - 12:30	Lunch
	Officer Installation
12:30 - 1:45	Concurrent Sessions
	· HFMA 101 – Getting the Most Out of Your Membership – Guice Smith & John Zimmerling
	· Medicare Cost Reports – Scott Mertie, FHFMA & Jonathan Uttz
	· Excel Pivot Tables (Part 1) – John Iodice
1:45 - 2:00	Break
2:00 - 3:15	Concurrent Sessions
	· ICD-10 Preparing for Denials – Lisa Walter, RHIA
	· Winning under Reform: Strategies for Optimizing your Revenue Cycle in 2013 – Susan Cobb, FACHE & Dan Bergantz
	· Excel Pivot Tables (Part 2) – John Iodice
3:15 - 3:30	Break
3:30 - 5:00	General Session - ICD-10 Panel Discussion with Gary Perrizo, Moderator
5:00 - 6:30	STAR Committee Reception
6:30 - 7:30	President's Inauguration Dinner
7:30 - 9:00	President's Inauguration Celebration

Wednesday – May 22

7:00 a.m. – 10:30 a.m.	Registration
7:00 - 8:00	Breakfast
	Board Meeting (continued)
8:00 - 9:45	General Session - CFO Panel Discussion with Paul Bolin, Moderator
9:45 - 10:15	Break
10:15 - NOON	General Session - Healthcare Regulatory Update: Recent Updates and Guidance from the Ever-Changing World of RAC, MAC, Medicaid and the OIG – Day Egusquiza
NOON	Closing Comments & Door Prizes – Guice Smith & Brad Adams (You must be present to win)
12:15 - 12:45	Sponsor Teardown
12:45 - 2:00	Sponsor Appreciation Lunch

Agenda and Presentation Descriptions

Sunday – May 19, 2013

Registration	4:00 – 6:00 PM
Sunday Night Reception and Trivia Contest	5:30 – 7:00 PM
Dinner on Your Own	7:00 PM

Monday – May 20, 2013

Golf Tournament at the Vanderbilt Legends Club – Benefiting the Gloria Adams Memorial Scholarship Fund	7:30 AM – 12:30 PM
Opening General Session	8:00 AM – 5:00 PM

Healthcare Finance Basics
Dr. Michael Nowicki, FACHE, FHFMA

This seminar provides an overview of the economic and legislative environments affecting healthcare funding and reimbursement and financial reporting requirements. This session is ideal for those new to the healthcare industry. This seminar also provides the basics of healthcare organizational structure, reimbursement, and accounts receivable. We will identify national economic trends and their relationship to healthcare sustainability. We will discuss the Affordable Care Act and its potential impact on the national economy. This session will identify the basic healthcare organization, including key positions and departments. Reimbursement, including methods of cost analysis and rate setting will be covered. Attendees will gain a better understanding of why the healthcare industry is unsustainable and organizational and reimbursement strategies to improve its economic position.
CPA CPE Credits: *Specialized Knowledge: 8.5 Hrs.*

Registration	11:00 AM – 5:00 PM
Concurrent Sessions	1:00 – 2:40 PM

Working Together: Effective Ways to Build Successful Teams
Jerry Teplitz, JD, Ph.D., CSP

This fast-moving training program can increase productivity and promote teambuilding by helping you learn more about your own and your team's needs, work styles and how both fit into your organizations overall goals. You'll discover practical strategies that foster cooperation in the business environment and your personal life. You'll learn how people with different work styles can resolve incompatibilities and interact more effectively as a team. You'll have fun and learn useful skills at the same time!

This session will provide attendees with the tools needed to:

- understand your own behavior styles, your strengths and weaknesses.
- understand how to communicate effectively with those you have difficulty relating to.
- discover your own work preferences and learn about your role on your team.
- help each individual comprehend what motivates them to be part of the team and find ways to maximize this motivation.

This seminar will guide attendees to new ways of viewing the work place, co-workers and their responsibilities. Attendees will more fully understand the function of teams and how to best work within one, appreciating the value of all the different roles while learning how to better interact with each team member.
CPA CPE Credits: *Specialized Knowledge: 2.0 Hrs.*

CPA Ethics
Jim Myers, CPA, CGMA
This course is designed to expand your knowledge and understanding so that you will know what to do when faced with ethical issues. It is designed to help answer some of those tough ethical challenges; to help you know where to turn; whom to consult and what resources are available; and what should be your next step when faced with an ethical dilemma.

Attendees will gain the ability to understand:
- the importance of complying with ethical standards
- the AICPA Code of Professional Conduct and various sources of ethical guidance
- ethical behavior and how to respond to various situations
- ethical responsibilities of a Tennessee CPA

This session will also cover compliance with Tennessee licensing rules for CPAs.
CPA CPE Credits: Ethics: 2.0 Hrs. to be issued by the TSCPA

Healthcare FASB Update
Meredith Douglas, CPA and Brian Tate, CPA
During this overview and update, attendees will hear about the recent actions of the FASB and AICPA that affect or may affect healthcare entities. Implications of these actions will be shared by the presenters. This session will assist the attendees to become aware of FASB actions and updates that impact healthcare entities. This session will include a discussion on the most current AICPA actions affecting assurance and auditing practices in the healthcare space.

Attendees will be made aware of immediate and longer term implications of accounting and auditing issues affecting their day-to-day work. This presentation will assist attendees in making any necessary changes in your reporting to comply with professional standards.
CPA CPE Credits: Accounting: 2.0 Hrs.

Break 2:40 – 3:00 PM

Concurrent Sessions 3:00 – 4:40 PM

Managing the Stress of Change
Jerry Teplitz, JD, Ph.D., CSP
Have you ever had a negative stressful day at work? How did you feel at the end of it? Tired, drained… Now, have you ever had a positive upbeat day at work? How did you feel at the end of it? Energized. What if you could create every day to be a great stress free day for yourself? What would that do to your stress, your productivity levels and your ability to handle change? Well-known author and top-rated speaker Dr. Jerry V. Teplitz will show you how to make every day that way through actual tools and techniques that will increase your energy level while reducing your stress resulting in a greater ability to deal with change. These immediately effective and easy methods can be applied to all aspects of your personal and professional life.

Attendees will gain the following knowledge:
- How to take a negative situation and change it to a positive situation
- How to increase your system's energy level during stressful times
- Methods to enable you to relax and/or energize when you feel overwhelmed
- Personal power techniques to increase your overall effectiveness while reducing the stress of change

CPA CPE Credits: Specialized Knowledge: 2.0 Hrs.

CPA Ethics (*continued*)
Jim Myers, CPA
This course is designed to expand your knowledge and understanding so that you will know what to do when faced with ethical issues. It is designed to help answer some of those tough ethical challenges; to help you know where to turn; whom to consult and what resources are available; and what should be your next step when faced with an ethical dilemma.

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- ethical responsibilities of a Tennessee CPA

This session will also cover compliance with Tennessee licensing rules for CPAs.
CPA CPE Credits: *2.0 Hrs. to be issued by the TSCPA*

Healthcare FASB Update (*continued*)
Meredith Douglas, CPA and Brian Tate, CPA
During this overview and update, attendees will hear about the recent actions of the FASB and AICPA that affect or may affect healthcare entities. Implications of these actions will be shared by the presenters. This session will assist the attendees to become aware of FASB actions and updates that impact healthcare entities. This session will include a discussion on the most current AICPA actions affecting assurance and auditing practices in the healthcare space.

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CPA CPE Credits: *Accounting: 2.0 Hrs.*

Sponsors' Reception 5:00 – 6:30 PM

Tuesday – May 21, 2013

Breakfast 7:00 – 8:00 AM

General Session – HFMA National Update: Thriving Amidst Reform 8:00 – 9:30 AM
President Joe Fifer, FHFMA, CPA
In this presentation, Mr. Fifer will provide attendees with an update from HFMA and an overview of HFMA's plans to move forward in an era of reform. Mr. Fifer will discuss the market forces impacting health care today, what the industry's responses have been to a changing healthcare landscape and the role of HFMA and its members in the days to come.

This session will also cover the following topics:

- Forces impacting health care
- Industry responses to the forces impacting health care
- HFMA's role in the coming days

Attendees will learn how the Affordable Care Act and changes to payment are impacting healthcare, how the industry is responding with an emphasis on scale, integration, and value, and what resources HFMA offers its members and the industry.
CPA CPE Credits: *Specialized Knowledge: 1.5 Hrs.*

Concurrent Sessions 9:45 – 11:00 AM

TennCare Update
Wendy Long, M.D., M.P.H.
Pearls of Wisdom – Audit updates, lessons learned and better practice ideas to reduce vulnerabilities in the ever changing world of RAC, MAC, and Medicaid audits. This dynamic operational focused class will address many 'hot off the press' issues related to the ongoing audits. Enhanced ownership in all areas of charge capture and documentation will headline 'lessons learned.' Attendees will gain audit updates and training ideas for reducing risk, as all departments are impacted.
CPA CPE Credits: Specialized Knowledge*: 1.5 Hrs.*

Securing the Benefits of Lean Implementation
Andrew Wampler and Logan Pigg
The steadily increasing cost of healthcare, higher levels of competition and a slowly recovering economy continue to place pressure on operating margins. The near certainty of reduced reimbursement makes the situation direr. Research suggests the operating margin of an average hospital could decrease by two percentage points annually through 2021; it is imperative that hospitals maintain and grow their healthcare margin if they want to truly provide top of the line care to their patients and fulfill their mission.

While CFOs recognize the looming pressures that threaten their margin, few have mapped a concrete strategy capable of generating sustainable margins. One approach to achieving this capability is Lean - continuous improvement of operational and business processes; while decreasing costs, improving quality, and advancing the patient experience.

- Achieving margin improvements through Strategic Deployment
- Instilling an accountable and continuous improvement culture
- Ensuring executive leadership "Lead by Doing"
- Identifying areas of waste removal
- Utilizing Visual Management

Achieved successes: Johnston Memorial Hospital IP Services & Johnson City Medical Center Emergency Services

CPA CPE Credits: Management Advisory: 1.5 Hrs.

Patient Receivables Segmentation Analysis

Steven Hovan

This presentation will take the attendees through the entire process of how the University of Tennessee Medical Center went about identifying their self-pay challenges and developing a roadmap for a successful management of the self-pay AR. This session will begin with an overview and dive into the ROI along with products and systems used to implement this successful self-pay strategy. Attendees will be provided an introduction and overview of self-pay problems. The presenter will also cover how to lay the foundation – crack the code, strategy, workflow and implementation moving forward.

CPA CPE Credits: Specialized Knowledge: 1.5 Hrs.

Lunch & Officer Installation — 11:00 AM – 12:30 PM

Concurrent Sessions — 12:30 – 1:45 PM

HFMA 101 – Getting the Most Out of Your Membership

Guice Smith & John Zimmerling

This session is designed to provide more information about HFMA and to explain how you can get more involved with the Chapter. You will learn about the benefits, products, and services HFMA can offer you personally, as well as the leadership opportunities that exist within the Tennessee Chapter. A portion of the topics include: How the Tennessee Chapter is organized, National HFMA structure, Founders Award Points, and Certification process.

CPA CPE Credits: Specialized Knowledge: 1.5 Hrs.

Medicare Cost Reports

Scott Mertie, FHFMA and Jonathan Uttz

This presentation will give C-level executives the knowledge to conduct a high-level review of a cost report and demonstrate ways to use cost report data as a management tool. Real-life examples will be included. Attendees will learn basics of high-level review of cost reports. Attendees will learn how to utilize settlements for future projections. Attendees will learn how to use cost-to-charge ratios and per diems for budgeting. Attendees will learn the important areas of the cost report which have a direct or indirect impact on reimbursement.

CPA CPE Credits: Management Advisory: 1.5 Hrs.

Excel Pivot Tables (Part 1)

John Iodice

Are you ready to take the next step in Microsoft Excel?

Have you ever had to produce an ATB from scratch? What about time studies of patient admissions over a three-year period, by hour? What about compiling a denial study on the fly in the middle of a meeting? If you understand Pivot Tables, these tasks are accomplished in relatively short order.

Pivot Tables are dynamic reports within Excel that take your analytic skills to the next level. Instead of creating one report based on a limited number of criteria, John will show you why it's important to import all the data you have at your disposal. John will show you why it's important for a manager to consolidate several years' worth of data into a single "pivot table" data-sheet. We'll discuss the idea of uniform data and "trash-in, trash-out." John will show how pivot tables can improve your efficiency and make you less dependent on your IT department. In short, Pivot Tables can change the way you look at data....forever.

Participants will learn what a pivot table is and how it can be used. Participants will work with several real data sets taken from actual Revenue Cycle areas to create pivot tables. Time permitting; V-lookups will be incorporated to further enhance the pivot table experience. Participants will hopefully develop a deeper understanding of how pivot tables will change the way they think of large data sets. Keeping the end in mind, pivot tables increase efficiency while decreasing errors. Even a general knowledge of pivot tables can pay huge dividends when using other "data-mining" tool interfaces.
CPA CPE Credits: *Computer Science: 1.5 Hrs.*

Break 1:45 – 2:00 PM

Concurrent Sessions 2:00 – 3:15 PM

ICD-10 Preparing for Denials
Lisa Walter, RHIA
To mitigate revenue loss and manage accounts receivable, hospital finance leaders must make ICD-10 denials management a top priority. The transition to ICD-10-CM/PCS poses a significant threat to the organization's revenue and cash flow. To best support revenue integrity, it is important to understand the potential effect of ICD-10 on denials frequency and type, and develop a strategy to move beyond traditional denials management methods. Effective denials management after the ICD-10 implementation deadline, October 1, 2014, will depend on the organization's ability to demonstrate new levels of documentation and coding efficiency and expertise. Getting there will take intensive planning, investment in technology and human resources, and new levels of understanding about workflows across the revenue cycle. No matter the size or the strength of existing denials management processes, hospitals and health systems need to pay attention to key focus areas to ensure transition success. This session will review key areas impacted by ICD-10 and critical steps for preparedness planning. Attendees will gain an understanding the potential impact of ICD-10 on reimbursement. The presenter will discuss denials management readiness strategy to minimize risk. Attendees will learn ways to mitigate the risk of revenue loss. This presentation will review the key areas impacted by ICD-10, and the critical steps for preparedness planning. Examples of the potential impact of ICD-10 on reimbursement will be provided. Denials management readiness strategy to mitigate the risk of revenue loss will be discussed.
CPA CPE Credits: *Management Advisory: 1.5 Hrs.*

Winning under Reform: Strategies for Optimizing your Revenue Cycle in 2013
Susan Cobb, FACHE & Dan Bergantz
The U.S. spends more on healthcare per capita and as a percentage of the Gross Domestic Product (GDP) than any other nation in the world. In 2011, health care spending in the U.S. totaled $2.7 trillion, or 17.9% of the GDP. Approximately one-third of the nation's healthcare expenditures are spent on hospital care.

Hospitals face increasing public underfunding from the Medicare and Medicaid programs, whose patients accounted for approximately 56% of hospital revenues in 2010. The payment shortfall relative to resource utilization cost hospitals $28 billion in 2010 according to the American Hospital Association. Hospitals also face the added challenge of caring for the nation's 49 million uninsured. As of 2011, 16% of the population (one in seven individuals) was uninsured. The cost burden of caring for the uninsured falls largely on hospitals, as patients without insurance turn to Emergency Departments for care. Collectively, hospitals spent $41 billion on uncompensated care in 2011.

1. Provide a bit of background on U.S. healthcare economics
2. Review the timeline, provisions, and impacts of healthcare reform
3. Explore revenue cycle strategies for improvement
4. Measure performance using Key Performance Indicators (KPIs)

CPA CPE Credits: Management Advisory*: 1.5 Hrs.*

Excel Pivot Tables (Part 2)
John Iodice

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CPA CPE Credits: *Computer Science: 1.5 Hrs.*

Break 3:15 – 3:30 PM

General Session – ICD-10 Panel Discussion 3:30 – 5:00 PM
Gary Perrizo, Moderator

This diverse panel discussion will focus on the requirement to convert to ICD-10, implementation plans that are currently underway, and how organizations plan to manage both historical and on-going reporting. Time will be allocated from audience questions.

CPA CPE Credits: *Specialized Knowledge: 1.5 Hrs.*

STAR Committee Reception 5:00 – 6:30 PM

President's Inauguration Dinner 6:30 – 7:30 PM

President's Inauguration Celebration 7:30 – 9:00 PM

Wednesday, May 22, 2013

Breakfast 7:00 – 8:00 AM

General Session: CFO Panel Discussion 8:00 – 9:45 AM
Paul Bolin, Moderator

This panel discussion will provide attendees the chance to see current trends in healthcare finance and operations from the perspective of Chief Financial Officers. Time will be allocated from audience questions.

CPA CPE Credits: *Specialized Knowledge: 1.5 Hrs.*

Break 9:45 – 10:15 AM

General Session – Healthcare Regulatory Update: Recent Updates and Guidance from the Ever-Changing World of RAC, MAC, Medicaid and the OIG 10:15 AM – NOON
Day Egusquiza

This dynamic operational focused class will address many 'hot off the press' issues related to the ongoing audits. Enhanced ownership in all areas of charge capture and documentation will headline 'lessons learned.'

Attendees will obtain training ideas for reducing their risk in these areas.
CPA CPE Credits: Specialized Knowledge: 2.0 Hrs.

Closing Comments & Door Prizes – Guice Smith & Brad Adams (You must be present to win)	NOON
Sponsor Teardown	12:15 – 12:45 PM
Sponsor Appreciation Lunch	12:45 – 2:00 PM

Speaker Biographies

(alphabetical)

Dan Bergantz

Dan Bergantz has over 12 years of combined research, financial, and consulting experience in the healthcare industry. He currently serves as Director of Advisory Services for PNC Healthcare specializing in revenue cycle process improvement, and also has extensive experience in strategic planning, labor management, strategic pricing, and physician productivity. Prior to joining PNC, Dan worked in the healthcare industry for organizations including the Premier Healthcare Alliance, Phase 2 Consulting, GE Healthcare, and the Utah Medical Education Council. Dan earned his MBA in Health Administration from the Eccles School of Business at the University of Utah, and is an active member of HFMA's Utah Chapter.

Paul Bolin

Paul Bolin serves as the Chief Financial Officer of Williamson Medical Center in Franklin, Tennessee, where he has been employed since 1994. Prior to becoming the CFO last August, he served as Williamson Medical Center's Controller, Compliance Officer, Interim Chief Information Officer, and Revenue Cycle Executive. Before he came to Williamson Medical Center, he was employed at HCA where he performed audit and consulting services.

Paul received his MBA from Belmont University in Nashville, Tennessee in addition to his Accounting Degree. He has served as an Adjunct Professor for Graduate level Healthcare Finance and Economics. He is also a Certified Public Accountant.

Paul is an accomplished athlete. In his spare time, he competes in marathons and Ironman triathlons. In 2005, he completed the Escape from Alcatraz Triathlon, which included a 1.5 mile swim across the frigid water of San Francisco Bay. He also enjoys riding his mountain bike and has participated in several events.

Paul lives in Franklin with his wife, Pam, and their three daughters, Sara Beth, Julia, and Anna. He and his family are very active in their church.

Paul is a fellow HFMA and is the newly inducted President for the Tennessee Chapter of the HFMA.

Susan Cobb, FACHE

Susan Cobb has over 12 years of experience assisting hospitals and healthcare systems improve financial performance through the implementation of focused, process improvement efforts and strategic software solutions. She currently serves as Director in PNC Healthcare's Advisory Services practice, where she specializes in revenue cycle performance improvement. Prior to joining PNC, Susan founded Cobb Consulting LLC, where she spent five years leading revenue cycle turnarounds and providing interim management services for hospitals throughout the country. Prior to that, Susan worked in the healthcare consulting practice of Wellspring Partners. Susan has a Master of Science in Health Administration from Trinity University in San Antonio, Texas and she is a Fellow in the American College of Healthcare Executives.

Meredith Douglas

Meredith, a Senior Manager in the LBMC Accounting and Assurance practice focusing in the healthcare industry, serves as the Senior Manager on a number of healthcare engagements, including audit, consulting and due diligence engagements, for hospitals, both for-profit and not-for-profit, behavioral health providers, ASC's, long-term care facilities and hospice care. With over nine years of public accounting experience, Meredith is familiar with the complex financial accounting requirements that healthcare companies typically face. She is actively involved in the Leadership Health Care and Nashville Health Care Council organizations, TSCPA, AICPA and serves on the TSCPA Health Care Conference Taskforce and the Finance Committee for the YWCA of Nashville.

Day Egusquiza

Day Egusquiza is a nationally recognized speaker on continuous quality improvement (CQI), benchmarking, redesigning, reimbursement systems and implementing an operational focus of compliance- both in hospitals and practices. She has been on the AAHAM National Advisory Council, HFMA National Advisory Council, HFMA faculty, CCH Reimbursement Advisory board and is a past President of the Idaho HFMA Chapter &; recently received the Lifetime Achievement Award. She has been highlighted in JCAHO's Six Hospitals in Search of Excellence, Zimmerman's Receivable Report, HFMA's HFM and Patient Account, AHIA Prospective, and numerous healthcare newsletters along with a contributing author to 2006 Health Law and Compliance Update. She received the Idaho Hospital Association Distinguished Service Award; for her legislative work and training on new indigent law. Attendees at HFMA's ANI rated her in the top 25%, earning her the 'Distinguished' Speaker recognition for each year she has presented.

Joe Fifer

Joseph J. Fifer, FHFMA, CPA, is president and chief executive officer of the Healthcare Financial Management Association. HFMA provides the resources healthcare organizations need to achieve sound fiscal health in order to provide excellent patient care. With more than 39,000 members, HFMA is the nation's leading membership organization of healthcare finance executives and leaders.

Prior to assuming this position in June 2012, Fifer spent 11 years as vice president of hospital finance at Spectrum Health, in Grand Rapids, Mich. Spectrum Health is a $4.1 billion health system that has received numerous recognitions, including being named a Top 10 Health System in 2010 and 2011 by Thomson Reuters. Mr. Fifer also spent time with McLaren Health Care Corporation, Flint, Mich., as vice president of finance and Ingham Regional Medical Center, Lansing, Mich., as senior vice president of finance and CFO. Mr. Fifer started his career with nine years at Ernst and Young, also in Michigan.

Fifer was Chair of the HFMA Board of Directors in 2006-07. An HFMA member since 1983, Fifer served as a chapter president and for two terms as an HFMA board member. Fifer has been a keynote speaker on healthcare finance and reform for organizations including the Center for Medicare & Medicaid Innovation and The Governance Institute. His industry insights have been featured in Forbes, Business Week, The Wall Street Journal, and other leading publications.

A Fellow of HFMA and a CPA, Fifer received his bachelor's degree in Business Administration from Saginaw Valley State University, University Center, Mich. Fifer is an active community volunteer and runner. Fifer and his wife, Katie, have three children: Sarah, Tom, and Joe-Joe.

Steve Hovan

Stephen Hovan is Vice President of Revenue Cycle for the University of Tennessee Medical Center in Knoxville, Tennessee. The 581-bed facility is an acute care teaching hospital affiliated with the University of Tennessee and generated over $1.6 Billion in gross revenue in 2011. The Medical Center is distinguished for its centers of excellence which include: Brain and Spine, Cancer, Heart Lung and Vascular Institutes, The Center for Women and Children's Health as well as Emergency and Trauma services. Mr. Hovan oversees the revenue cycle operations for the hospital and has assisted in transforming the revenue cycle. Prior to joining University of Tennessee Medical Center he served in similar positions for the last 22 years.

Mr. Hovan holds a BS from Clarion University in Pennsylvania and a MBA from Indiana Wesleyan University. He is an active member of Tennessee HFMA.

John Iodice

John Iodice is the Revenue Cycle Reporting and Analytics Manager at Gwinnett Medical Center where he has been employed for 17 years. He is CPAR certified and obtained a Bachelor's Degree of Science from North Georgia College. John has been an active member with Georgia HFMA since 2003, serving in various team roles including Education and Logistics, Photographer, Scroll Editor, Website Committee Chair and DCMS Secretary.

John enjoys reading, movies, music and all things trivial. An avid Excel user, John is by no means an expert. However, his experience shows that most of us are barely scratching the surface of what can be accomplished within Excel. John is convinced that every time someone learns how to create a Pivot Table, "an angel gets his wings."

Neil Koonce

Neil Koonce is the President of Healthcare Receivables Group, Inc., an accounts receivable management and consulting firm based in Knoxville, Tennessee. Neil founded HRG in 1993. In addition, Neil co-founded Account Management for Health, Inc. in 1996 and Revenue Cycle Solutions Group in 2009. Neil has been actively involved in the healthcare industry since 1985.

Neil holds a B.S in Business Administration and Marketing from Tennessee Technological University. Neil is an advanced member and past-president of the Tennessee Chapter. He has received the Follmer Bronze Merit Award, the Reeves Silver Merit Award, the Muncie Gold Merit Award and the Medal of Honor. In 1997, Neil was awarded the TCHFMA Ira M. Lane Award for sustained service to the Tennessee Chapter. In 2002, Neil was awarded the HFMA Tennessee Chapter Henry Hottum Award for significant contributions to the field of healthcare accounting and business office practices.

Neil is a past Regional Executive for Region 5, a past member of the Chapter Services Council of National HFMA, a Helen M. Yerger Award Judge, and served as a member of the national Task Force on Governance, Organization, and Structure for HFMA. Neil was appointed to two three-year terms as a Chapter Advancement Team (C.A.T.) member and served as the Chair of the Chapter Advancement Team for 2005-2006.

In 2012, Neil was the 54th recipient of the Frederick C. Morgan Individual Achievement Award. The Morgan Award is designed to recognize a single HFMA volunteer member for outstanding contributions to the Healthcare Financial Management Association as a result of substantial activity over the course of a career.

Wendy J. Long, M.D., M.P.H.

Dr. Wendy Long is the Deputy Director and Chief of Staff for Health Care Finance and Administration (HCFA) in the State of Tennessee. Included under the HCFA umbrella is TennCare, Tennessee's nearly $10 billion Medicaid managed care program which functions as the largest health insurer in the State of Tennessee, providing coordinated physical, behavioral and long term care coverage to 1.2 million Tennesseans. Other HCFA programs include the Office of e-Health and the Strategic Planning and Innovation Group which administers the Cover Tennessee insurance products and spearheads efforts related to payment reform and coordination with the federal Health Insurance Exchange.

Dr. Long provides leadership to all areas of HCFA operation with particular emphasis on oversight of contracts with TennCare's network of managed care companies (MCOs, PBM and DBM) and design and implementation of cost effective strategies to improve health outcomes.

At the national level, Dr. Long is involved in health policy through the efforts of several organizations including serving as a member of the National Committee for Quality Assurance (NCQA) Standards Committee and the Steering Committee for the Milbank Fund's Reforming States Group.

Dr. Long received her undergraduate and medical degrees from the Ohio State University and completed a Preventive Medicine residency and the Master of Public Health program at the University of South Carolina. She served as TennCare Chief Medical Officer from 2004 through 2012, prior to being appointed to her current role in Health Care Finance and Administration in January of 2013.

Troy Lacher

Troy Lacher is Emdeon's ICD-10 Program Manager. He is responsible for working across the Emdeon enterprise to ensure program delivery for Emdeon's ICD-10 remediation of impacted software and supporting services. This Program oversight includes the publication of Emdeon's external program communications, internal operational readiness, as well as facilitation of Emdeon's trading partner testing engagements .

In addition to his PMP certification, Troy has extensive pragmatic project and program delivery experience; supporting product innovation, software implementation, and enterprise technology integration initiatives.

In this capacity, he has worked with health systems and health plans to develop, deploy, and operationalize numerous payment integrity solutions.

Scott Mertie

Scott Mertie leads Kraft Healthcare Consulting, LLC -an affiliate of KraftCPAs PLLC. With over 20 years of reimbursement, operational and financial experience in the healthcare industry. Scott consults on various areas involving reimbursement, including Medicare and Medicaid cost reports, for healthcare clients throughout the United States.

Scott performs other operational reviews and consults on other areas involving the revenue cycle. He also provides expert reports and testimony for healthcare related litigation. His clients include medical/surgical, psychiatric, rehabilitation and long-term acute care hospitals; skilled nursing facilities; home health agencies; rural health clinics and attorneys.

Scott is active in the Nashville Health Care Council, where he has participated on international trade missions to the UK and France. He also served as a delegate, along with Tennessee Governor Phil Bredesen, for a healthcare trade mission to China, in conjunction with the Tennessee Department of Economic Development.

James Myers, CPA, CGMA

Jim Myers, CPA Knoxville, Tennessee is a CPA with over 35 years' experience working in

CPA firms (Big 8 to small firms), as a CPA firm partner for 15 years, as a corporate controller, senior vice president and Accounting Department Director for a bank, financial director for a non-profit organization, and bank internal auditor. Myers is a member of the AICPA, the Tennessee Society of CPAs (TSCPA) and several other local and regional organizations. He currently serves as an at-large member of the Board of TSCPA, and has also served as Chairman of the Professional Ethics and the Technology committees and is a past state officer. He has been a speaker for continuing education courses for the AICPA, the TSCPA, Georgia Society of CPAs, North Carolina Association of CPAs, and the Tennessee Association of Public Accountants. He co-authored the TSCPA ethics training course for Tennessee CPAs. Myers is a graduate of Carson-Newman College and is a member of the college's alumni board. He is also a board member for Teen Center of Knoxville, Inc.

Michael Nowicki, MHA, EdD, FACHE, FHFMA

Michael Nowicki is Professor and Director of the School of Health Administration at Texas State University where his teaching, research, and service have been recognized with several university awards. Prior to entering academe, Dr. Nowicki was Director of Process Management in the Hospital Division of Humana. Before Humana Dr. Nowicki served in a variety of healthcare administrative positions in California, Michigan, Washington, D.C., and Texas.

Dr. Nowicki has 35 years of healthcare management experience. He holds a Bachelors of Arts degree in Political Science from Texas Tech University, a Master of Arts degree in Health Administration from The George Washington University, and a Doctor of Education degree in Educational Policy Studies and Research from the University of Kentucky. He is board certified in healthcare financial management and a Fellow of the Healthcare Financial Management Association where he has served as President of the South Texas Chapter, Regional Executive for Region 9, National Board Member, Chairman of the Chapter Services Council, Chairman of the Forums Council, and Chairman of the Board of Examiners. He is also board certified in healthcare management and a Fellow of the American College of Healthcare Executives.

Dr. Nowicki has presented financial management seminars worldwide and is a frequent speaker at HFMA and ACHE events. Dr. Nowicki is also the financial management instructor for the ACHE tutorial. Dr. Nowicki is the author of the best-selling *Introduction to the Financial Management of Healthcare Organizations,* published in the fifth edition in 2011 by HAP/AUPHA. In 2006, Dr. Nowicki authored the 5th edition of *HFMA's Introduction to Hospital Accounting* also published by HAP/AUPHA/HFMA. Dr. Nowicki has authored numerous articles and studies in journals such as *Healthcare Financial Management* and *HealthLeaders*.

Gary Perizzo

After graduation from Austin Peay State University, Gary began his accounting career in 1976 as an auditor with the cpa firm Touche Ross and Company (now known as Deloitte Touche). One of the first clients Gary was assigned to was the annual audit of the Vanderbilt University Medical Center. During Gary's five years with Touche Ross, he was also assigned to audits of Metro General Hospital and Service Merchandise Co. Inc.

In 1980, Gary accepted the position of Assistant Controller of the Service Merchandise Co., Inc. where he remained until 1987. On April 1, 1987, Gary began working in the department of Financial Management (now known as the Department of Finance) at Vanderbilt University Medical Center as an Assistant Director. For approximately 10 years, Gary was responsible for the implementation of financial software that included general ledger, accounts payable, and payroll, In 1991 Gary accepted the additional responsibilities of the Hospital and Clinic accounting staff that produced the monthly financial statements. Other areas Gary was responsible for during this time included, Medical Center Payroll and Data Control and the implementation of registration software utilized by the Hospital and Clinic.

In 1996, Gary accepted the position of Director of Patient Accounting. During the past 11 years in this position, the Medical Center has expanded to three hospitals and multiple clinics. Gary continues to work in system implementations of hospital and clinic software in his current role.

In 2008, Gary acquired the Admitting Department, ER Registration/Discharge, Insurance Management, and inpatient Financial Counseling while continue to be the Director of Patient Accounting.

Beginning in early 2010, Gary was appointed to oversee the technical revenue cycle of the hospitals and clinics. In the role, new departments, such as the Charge Integrity Department, have been added to Gary's organizational responsibilities.

Gary was born in Minnesota and raised in Kentucky. He has two children, Michael and Laura.

Logan Pigg

Logan Pigg is Corporate Director of Finance for Mountain States Health Alliance (MSHA). For eight years, he has amassed a variety of experience as a Financial Analyst, facility CFO, and most recently as the Corporate Director of Finance. Currently, Logan directs the capital planning, financial and trend analysis for 13 hospitals, 21 primary/preventative care centers, numerous outpatient care sites and retail services. As a strategic partner of the AnewCare ACO, he is responsible for the financial modeling of CMMI's Bundle Payments for Care Improvement Initiative. Most recently he has embraced the lean methodology to focus on the Triple Aim and aid his organization in navigating healthcare reform.

Logan has a Bachelor of Science and Master of Business Administration degrees from East Tennessee State University. He is a certified Healthcare Financial Management Professional (CHFP) from the Healthcare Financial Management Association (HFMA), and is Lean Bronze certified from the University of Iowa.

Jerry Teplitz, JD, Ph.D., CSP

Dr. Jerry V. Teplitz' background is as unique as the techniques and approaches he teaches. He is a graduate of Hunter College and Northwestern University School of Law. He practiced as an attorney for the Illinois Environmental Protection Agency and also received a Doctorate Degree in Holistic Health Sciences.

Dr. Teplitz' clients include the HFMA Chapters in Georgia, Virginia, Arizona, Kentucky, Mississippi, Nevada, Iowa and Wisconsin.

Jerry is co-author of a #1 Best Seller on Amazon - Switched-On Selling: Balance Your Brain For Sales Success. Other books he has authored include Managing Your Stress In Difficult Times: Succeeding in Times of Change and Brain Gym for Business, and Switched-On Networking: Balance Your Brain for Networking Success.

Articles on Jerry have appeared in such publications as Successful Meetings, Prevention, and Travel & Leisure Golf Magazine. He has also been listed in several editions of Who's Who in America and now hosts an internet radio show called Healthy Alternatives.

Jerry is one of only 600 speakers world-wide who has earned the title Certified Speaking Professional from the National Speakers Association. He has been selected by the PCMA as a "Best-In Class" speaker and by the CSAE as an Association Excellence Speaker based on the quality and impact of his presentations.

Jonathan Uttz

Jonathan Uttz is a manager of advisory services with Kraft Healthcare Consulting, LLC -- an affiliate of KraftCPAs PLLC. Jonathan specializes in hospital operations and other third party reimbursement issues for hospitals and healthcare facilities.

Jonathan has nearly 15 years of experience in the healthcare industry, including Medicare/Medicaid reimbursement and hospital finance and operations. His previous experience includes chief financial officer for an acute psychiatric hospital, corporate reimbursement manager for two national hospital chains, and consultant for a regional CPA firm.

Jonathan received the Nashville Business Journal's 2009 Healthcare Hero award as a result of his professional and community involvement. He also served as a delegate, along with Tennessee Governor Phil Bredesen, for a healthcare trade mission to China, in conjunction with the Tennessee Department of Economic Development.

Lisa Walter, RHIA

Lisa A. Walter, RHIA is a hospital revenue cycle management professional with 10+ years of revenue cycle management consulting experience, and 30+ years of Health Information Management (HIM) leadership experience. Her expertise is in building and leading mid-revenue cycle departments and process improvement solutions teams. She effectively assesses and directs HIM, Coding, CDI & Patient Access department operations. She is an experienced project manager, and nationally recognized HIM presenter. At Optum, she has managed mid-revenue cycle projects including reducing hospital DNFB through operational process improvements; implementing HIM productivity standards and monitoring tools to maximize staffing utilization; implementing HIM remote coding solutions for increasing efficiency and reducing expenses; increasing coding quality through ongoing monitoring and education resulting in improved reimbursement, reduced billing claims delays and denials; participating on computer assisted coding implementation team; and ICD-10 project management. Lisa holds two Bachelor of Science Degrees; one in Health Information Management from The Ohio State University and one in Business Administration from John Carroll University. She is past President of the North Carolina Health Information Management Association, and the NCHIMA 2010 distinguished member.

Andrew Wampler

Assistant Vice President, Value Optimization System for Mountain States Health Alliance (MSHA). As a member of MSHA's management team, Andrew directs the Value Optimization System or the lean implementation for the integrated healthcare delivery system of 13 hospitals, 21 primary/preventative care centers and numerous outpatient care sites. Andrew has 13 years of healthcare experience working with process improvement and financial analysis. Andrew holds a BA and MBA from East Tennessee State University, and is a certified Healthcare Financial Management Professional (CHFP) from the Healthcare Financial Management Association (HFMA), and is Lean Bronze certified from the University of Iowa.

John Zimmerling, FHFMA

John is a founding partner of Accordias Healthcare Services, LLC, a revenue cycle management and business office services firm based in Nashville, TN. John is a Fellow of the Healthcare Financial Management Association, a former board member of the Tennessee Chapter of HFMA, and a past chair of the Programs and Education Committee. He specializes in revenue cycle operations and reimbursement management consulting supported by his extensive information systems experience. He currently lives in the Colorado, but remains an active member in the Tennessee chapter.

REGISTRATION, FEES, AND CONTINUING EDUCATION CREDITS

Registration is available exclusively through our website at www.thespringinstitute.org/registration/.

	By May 1, 2013	May 1, 2013 or Later
Full Institute		
HFMA Member	$175	$225
Student Members	$125	$175
Non-Member	$225	$275
One Day		
HFMA Member	$100	$150
Student Members	$50	$100
Non-Member	$150	$200
CPA Ethics & FASB Update Only		
Certified Public Accounts	$75	$75
Guest Tickets		
Reception or Lunch	$35	$35
Tuesday President's Dinner & Casio Nigh	$50	$50

Cancellation Policy

Request for cancellation and refund of registration fees must be received by May 7, 2013 or a $50 administrative fee will be assessed. To cancel, please e-mail registration@thespringinstitute.org.

CPE Credits

TNHFMA recommends a maximum of 19.0 hours CPE for the 2013 Spring Institute. The Tennessee Chapter of HFMA is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE sponsors. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.learningmarket.org. For complaints regarding this or other educational programs provided by TNHFMA please contact our Programs and Education Chairman, Kelly Miller, at programs-education@tnhfma.org.

NATIONAL REGISTRY OF CPE SPONSORS

Course level-basic (unless otherwise specified)
Course prerequisites-none
Advanced Preparation-none
Instruction delivery method-live presentation

Handouts

In an effort to be *green*, printed handouts will not be provided for each session at the 2013 Spring Institute. However, a link will be emailed to all registered attendees on or before May 16, 2013 with instructions on how to download the handouts.

CONFERENCE INFORMATION

Hotel

The 2013 Spring Institute will be held at the Embassy Suites in Franklin, Tennessee. The hotel conference rate is $159 plus. To take advantage of the group rate, hotel reservation must be made by April 26, 2013. To make reservations by phone please call (615) 515-5151 and mention TN Healthcare Financial Management. Information to make online reservations is available on our website.

Smoking and Dress Policy

A "No Smoking Policy" has been adopted for all meetings. "Business Casual" attire is appropriate for all educational meetings and activities.

Special Dietary Needs

Please indicate any special dietary needs on your registration, so we can try to accommodate your request. If you are not planning to attend any of the meal functions, please indicate this as well. This information will be useful in planning the number of meals to be served. Thank you for your cooperation.

Door prizes

There will be prize drawings held on Wednesday, May 22, at the close of the meeting. You must be present to win!!

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