



**hfma**<sup>™</sup>

healthcare financial management association

Greater St. Louis – Heart of America – Show-Me of Missouri – Sunflower Chapters

**Kansas City Westin Crown Center**

# 15<sup>th</sup> Annual

# 2011

**SURVIVING THE  
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**THE  
LEADERSHIP  
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CHIP MADERA**

**HEALTH INSURANCE  
EXCHANGES  
SANDY PRAEGER,  
KS INSURANCE  
COMMISSIONER**

# HFMA Joint

# Conference

**August 24 - 26**

# Agenda at a Glance

# 15<sup>th</sup> Annual 2011 Joint Conference

## Wednesday, August 24

10:30 – 4:00	Registration
9:00 – 12:00	<b>General Session</b> Certification Review Jason Barb, CPA, FHFMA, Sr. Manager - BKD
1:00 – 1:15	Opening Remarks
1:15 – 2:30	<b>General Session - Key Note Speaker</b> Leadership 2011: Accelerating Business Results in Uncertain Times! Chip Madera
2:30 – 2:45	Break
2:45 – 4:30	<b>General Session - Key Note Speaker (Continued)</b> Leadership 2011: Accelerating Business Results in Uncertain Times! Chip Madera
5:00 – 6:30	Reception and Trade Show

## Thursday, August 25

7:30 – 11:00	Registration	
7:30 – 8:30	Continental Breakfast & Trade Show	
8:30 – 9:45	<b>General Session</b> Evidence Based Revenue Cycle Improvement John W. Majchrzak, CPA, FHFMA, MBA - SIHF- Touchette Regional Hospital Diane Watkins, FHFMA, MA - Saint Luke's Health System	
9:45 – 10:15	Break & Trade Show	
10:15 – 11:45	<b>General Session - Key Note Speaker</b> Health Care Insurance Exchanges Sandy Praeger - Kansas Insurance Commissioner	
11:45 – 1:15	Lunch	
1:15 – 2:30	<b>Concurrent Session</b> Audit Regulation Changes Kimberly McKay, CPA - BKD	<b>Concurrent Session</b> Healthcare Reform and the Impact on Nonprofit Hospitals Doug Anning, JD - Polisinelli & Shugart
2:00 – 3:00	Break & Trade Show	
3:00 – 4:30	<b>Concurrent Session</b> CMS Audits: A Documentation Survival Guide Stacy Harper, JD, MHSA, CPC - Forbes Law Group	<b>Concurrent Session</b> In House vs. Outsource HR and Payroll Peter Locketta - ADP Health Group
4:30 – 5:30	Vendor Booth break down	
5:15 – 10:00	Dinner & Entertainment	

## Friday, August 26

8:30 – 10:00	<b>General Session - Key Note Speakers</b> Surviving the Storm of a Lifetime was Just the Beginning Shelly Hunter, FHFMA, MBA - St. John's Regional Medical Center Chris Knackstedt, CPA, MBA - St. John's Health System
10:00 – 10:15	Break
10:15 – 11:45	<b>General Session</b> Financial Assistance & Charity Care Panel Discussion Hilary Dolbee, Moderator - Pratt Regional Medical Center
11:45 – 12:00	Closing Remarks



## Program Descriptions

## 15<sup>th</sup> Annual HFMA Joint Conference

### Wednesday, August 24, 2011

10:30 – 4:00 p.m. **Registration**

11:00 – 1:00 p.m. **Vendor booths set up**

9:00 – 12:00 p.m. **Certification Review**  
**Jason Barb, CPA, FHFMA, Sr. Manager, BKD**

#### **Session Overview:**

This session will provide an overview of the HFMA certification program review which was redesigned effective January 1, 2011. This session will serve as an introduction to the certification program for those individuals who want more information about certification. The session is designed as a group discussion led by a certified member.

#### **Learning Objectives:**

- Review requirements to take the exam as well as requirements to become a Certified Healthcare Financial Professional (CHFP) and Fellow of HFMA (FHFMA) including changes to the certification program.
- Discuss format of the new exam including topics covered and how the exam is administered.
- Review sample practice questions from the new exam review materials.

#### **Biography:**

Jason Barb is a member of BKD National Health Care Group and provides audit, reimbursement and consulting services to hospitals, long-term care facilities, governmental and not-for-profit organizations. His 13 plus years of experience include implementing new Financial Accounting Standards Board and Governmental Accounting Standards Board pronouncements, technology issues, internal control reviews, preparation of Medicare and Kansas Medicaid cost reports and performing employee benefit plan audits. Jason is a Fellow of The Healthcare Financial Management Association (FHMA). Jason is a certified member of the Sunflower Chapter of the Healthcare Financial Management Association (HFMA), has been a speaker at the chapter's annual Medicare cost report training seminar and is co-chair of the HFMA Professional Excellence Committee. He also is a member of the Kansas Hospital Association, Kansas Health Care Association, Kansas Association of Homes and Services for the Aging, American Institute of Certified Public Accountants and Kansas Society of Certified Public Accountants.

1:00 – 1:15 p.m. **Opening Remarks & Attendance Prize Drawings**



**Wednesday, August 24, 2011 (Continued)**

**1:15 – 2:30 p.m.     Leadership 2011: Accelerating Business Results in Uncertain Times!  
Chip Madera, MS, CSP**

**Session Overview:**

Complexity drives chaos and chaos drives unsustainable results. Today’s business leaders are expected to reduce costs, increase revenues, and operate with bare bones resources – all the while engaging disgruntled employees to perform at the highest level. Today’s workplace is inundated with multiple challenges and stresses and yet the solutions for thriving and succeeding are quite simple. Chip will show you the beauty and elegance of simplicity as he shares key strategies for accelerating your results and increasing your bottom line during these uncertain times.

**Learning Objectives:**

- Identify the value of focusing on creating experiences instead of increasing sales/revenue
- Create daily self-talk that will drive performance and advance influence
- Plan significant time in the right “zone” to maximize effectiveness and lead key change initiatives

**Biography:**

Chip Madera, MS, CSP is a Motivation and Performance Management expert who speaks over 100 times each year in Canada, Australia, Europe, South America and throughout the USA. He possesses a BS in Psychology and a Masters in HR and Organizational Development from Barry University. He also posts over 150 hospitals and healthcare organizations on his speaking resume. His clients include the Mayo Clinic, Disney, AT&T, Westinghouse, Southern Company and hundreds more. He has been honored with the prestigious Certified Speaking Professional designation from the National Speakers Association which is given only to those professionals who have earned it by achieving strict criteria. This puts Mr. Madera in the ranks of less than 500 speakers worldwide who have been honored with this designation. He helps healthcare organizations accelerate their results and increase their bottom line.

**2:30 – 2:45 p.m.     Break**

**2:45 – 4:30 p.m.     Leadership 2011: Accelerating Business Results in Uncertain Times! (Continued)  
Chip Madera, MS, CSP**

**5:00 – 6:30 p.m.     Reception and Trade Show (Don’t miss the fun! Please visit our vendor sponsors.)**



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## Thursday, August 25, 2011

7:30 – 11:00 a.m. **Registration**

7:30 – 8:30 a.m. **Continental Breakfast & Trade Show**

8:30 – 9:45 a.m. **Evidence Based Revenue Cycle Improvement**  
**John Majchrzak, FHFMA, CPA, MBA, Touchette Regional Hospital**  
**Diane Watkins, MPA, FHFMA, St. Luke's Health System**

### **Session Overview:**

Given the twin pressures of reform and a tight economy, hospitals are depending on their revenue cycles to run efficiently and capture all payments the hospital is due. For years, hospitals have been improving their revenue cycle, but today they need even higher performance--in many cases with fewer resources.

The solution is a continuous, evidence-based approach to revenue cycle improvement. Evidence-based improvement requires using industry-standard key performance indicators to measure performance, comparing results over time with peers and high performers, and reviewing and using successful practices of high-performing organizations.

The presentation includes examples of how hospitals have used these processes and practices that HFMA research has shown are associated with high performance. Also learn more about HFMA's MAP initiative for revenue cycle excellence, including HFMA's MAP Keys (key performance indicators) and the MAP Award.

### **Learning Objectives:**

- Select key performance indicators to measure revenue cycle performance
- Use a comparative approach to identify improvement opportunities
- Identify successful practices associated with revenue cycle excellence in key areas, including culture, people, processes, and technology

### **Biographies:**

John W. Majchrzak, FHFMA, CPA, MBA, the Chief Financial Officer for SIHF – Touchette Regional Hospital (154 licensed beds, annual Net Patient Revenue of approx \$70 million) has over 20 years of progressive financial experience with more than 15 of those years within various health care settings. In his current role, he provides executive financial leadership and strategic planning for two safety net hospitals, including a hospital based Home Health agency, located in Centreville and East St. Louis, IL. Mr. Majchrzak is a Fellow member of the Healthcare Financial Management Association (HFMA) and current Officer of the Southern Illinois Chapter and has been selected for a second term on the national HFMA KPI task force.



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**Thursday, August 25, 2011 (continued)**

Diane Watkins is the Vice President of Revenue Cycle for Saint Luke’s Health System. In her more than 25 years of healthcare industry experience, she has held leadership positions in patient financial services, patient access, and revenue cycle management. Ms. Watkins received an M.A. in Public Administration in 1987 and a B.A. in Business Administration in 1981 from the University of Missouri. She is certified by HFMA as a Fellow (FHFMA). Ms. Watkins has also served as an HFMA National Director and president of the Heart of America chapter.

**9:45 – 10:15 a.m. Break & Trade Show** (Time to learn from and with the vendors.)

**10:15 – 11:45 p.m. Healthcare Insurance Exchanges**  
**Sandy Praeger, Kansas Insurance Commissioner**

**Session Overview:**

Commissioner Praeger, a state and national authority on health care reform, will present ideas and information on many aspects of the Affordable Care Act, primarily focusing on the implementation and integration of health insurance exchanges. Kansas was selected to receive one of seven “Early Innovator Grants” from the U.S. Department of Health and Human Services, which is being used to fund creation of the state’s Kansas Medical Eligibility Determination System (K-MED) for Medicaid and CHIP, plus the integration with the private health insurance exchange. Participants will gain an overview of K-MED and understand how it will affect the payment of healthcare in the future.

**Biography:**

Commissioner Sandy Praeger was elected Kansas’ 24<sup>th</sup> Commissioner of Insurance in 2002 and began serving on Jan. 13, 2003. She was re-elected in 2006 and again in 2010. Commissioner Praeger is responsible for regulating all insurance sold in Kansas and overseeing the nearly 1,700 insurance companies and 94,000 agents licensed to do business in the state. Commissioner Praeger serves as Chair of the Health Insurance and Managed Care Committee for the National Association of Insurance Commissioners and NAIC past president. She is frequently called upon by media and called to testify before Congress on health reform. She is a two-time recipient of the prestigious Dr. Nathan B. Davis Award, bestowed annually by the American Medical Association to individuals who have made a significant contribution to the public health through elected and career government service. Commissioner Praeger is a graduate of the University of Kansas and lives in Lawrence, Ks., with her husband, Dr. Mark Praeger.

**11:45 – 1:15 p.m. Lunch**



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## Thursday, August 25, 2011 (continued)

1:15 – 2:30 p.m. Concurrent Sessions

### Audit Regulation Changes

Kimberly McKay, CPA, BKD

#### **Session Overview:**

The American Institute of Certified Public Accountants (AICPA) has released a draft of the proposed Audit and Accounting Guide, *Health Care Entities*. This presentation addresses the accounting issues that led to the creation of the new guide and offers guidance for implementing these changes in your health care organization.

#### **Learning Objectives:**

- Identify new accounting standards in the proposal by the Draft Health Care Audit Guide such as the gross presentation of insurance claims and recoveries and the reporting of charity care
- Highlight the changes in the proposed audit guide and how these differences will significantly affect a health care organization
- Learn about current accounting topics such as the recording of electronic health record funding and the proposed lease accounting standard

#### **Biography:**

Kimberly is the North regional industry leader for BKD National Health Care Group. She has more than 18 years of experience in the health care industry providing services to health systems, hospitals, mental health centers, long-term care facilities and physician practices. She manages the audits of numerous health care providers and is actively involved in all aspects of health care services, including accounting and auditing, third-party reimbursement consulting and Medicare/Medicaid cost report preparation. She also assists health care clients with special projects, including negotiations with intermediaries, financing and strategic planning. In 2009, Kimberly was appointed to the national American Institute of Certified Public Accountants (AICPA) Health Care Expert Panel, which focuses on identifying health care auditing and accounting issues to bring forward to the Financial Reporting Executive Committee. In addition, Kimberly serves on the AICPA Health Care Audit Guide committee, which proposes changes to the Health Care Audit Guide.



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**Thursday, August 25, 2011 (continued)**

**1:15 – 2:30 p.m. Concurrent Sessions**

**Healthcare Reform and the Impact on Nonprofit Hospitals: The New Schedule H and IRS ACO Regulations**

**Doug Anning, JD, Polisinelli & Shugart**

**Session Overview:**

While the initial buzz around the enactment of healthcare reform has started to fade, many federal agencies charged with implementing the Act have just started issuing regulatory guidance. Recently, the IRS has issued a new Form 990 Schedule H (which implements Internal Revenue Code Section 501(r) applicable to 501(c)(3) hospitals), and proposed guidance on participation in ACOs. Both of these will have significant impact on nonprofit hospitals. This session will review the new Schedule H and Instructions, as well as ACO guidance.

**Biography:**

Doug Anning is a shareholder in the firm of Polsinelli Shugart PC, and is the vice-chair of its nonprofit, tax-exempt and government entities practice group. Doug's work is almost exclusively with nonprofit and government hospitals where he consults with clients regarding a myriad of regulatory requirements (tax-exemption, bond issues, HIPAA, Anti-kickback, Stark Self-Referral, EMTALA, FTC/DOJ Antitrust, the Joint Commission, and nonprofit governance standards). In addition, Doug has substantial experience in mergers and acquisitions, transactional matters and structuring joint ventures.

**2:30 – 3:00 p.m. Break & Trade Show** (Visit vendors you know nothing about and learn something new.)





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## Thursday, August 25, 2011 (continued)

**3:00 – 4:30 p.m. Concurrent Sessions**

### CMS Audits: A Documentation Survival Guide

**Stacy Harper, JD, MHSA, CPC, Forbes Law Group**

#### **Session Overview:**

RAC is here. HEAT is coming. CERT, MIC and the other reviewers aren't going away. A facility's survival in this hostile, highly scrutinized environment is heavily dependent on the sufficiency of documentation by physicians and other care providers. In this presentation we will discuss the various auditors currently scrutinizing healthcare providers and the focuses and common triggers for each. More importantly, we will discuss common documentation deficiencies and strategies available to healthcare providers to improve documentation and coding practices.

#### **Biography:**

Stacy focuses her practice on regulatory compliance and healthcare reimbursement. Stacy has previous experience as a physician practice office manager and compliance officer. She is a certified professional coder with first-hand knowledge of the legal and practical reimbursement structures of government and private payers. Stacy has assisted providers with the successful resolution of reimbursement disputes related to claims denials, audits, and appeals. She also offers an in-depth understanding of the federal and state regulatory environment affecting healthcare, providing a solid foundation upon which her clients can make business decisions.

### In House vs. Outsource HR and Payroll

**Peter Locketta, Director, ADP**

#### **Session Overview:**

With the recent economic uncertainty and the lasting effects the recent downturn (and healthcare reform) will have, healthcare organizations continue to keep a keen eye on the bottom line impact of their decisions, and the effects that the "New Economy" has and will continue to have on their decisions. Now more than ever, healthcare financial officers and administrators are being stretched to think outside the box on deployment and delivery of HR services throughout their organization.

During this session, ADP will utilize case studies, third party studies, and audience participation to share with attendees ways to measure the Total Cost of Ownership (TCO) of their organization's currently deployed HRIS solutions (HR, Payroll, Benefits, Time & Labor, & Talent Management), systems and processes. Our conversation will provide a comparison of the TCO between organizations that have



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deployed their HRIS solutions through an in-house software based approach model vs. those deployed via a service based approach.

**Learning Objectives:**

- Identify ways organizations can increase the use of technology while driving down the organization's overall Total Cost of Ownership
- Maximize an organization's leverage technology to elevate the focus from transactional HR service processing to one that focuses on strategic development and deployment
- Evaluate strategies that can be deployed to meet the unique requirements and needs of a multi-generational workforce

**Biography:**

Peter Locketta is a Director in the Healthcare Group at ADP, providing industry knowledge and experience to the development and sales teams company wide. Prior to joining ADP Peter was the Vice President of Healthcare Mobility at Infologix, with a focus on strategic relations and developing best practices related to utilizing technology to enhance operations at health systems worldwide. Before Infologix, he was employed by Both Intel Corporation and Advanced Micro Devices (AMD), as a Global Manager, Healthcare Group for many years. In this capacity, Peter was responsible for strategic sales direction, GTM program development and sales support to the worldwide healthcare team for both consumer and enterprise healthcare markets.

**4:30 – 5:30 p.m. Vendor booth break down –** Booths can also be taken down on Friday after the conclusion of the conference

**5:15 – 10:00 p.m. Dinner and Entertainment – Join us for cocktails, trivia, dinner and music!**

Enjoy cocktails and food from 5:15 – 6. At 6:00 the trivia begins! This is a team based, fast paced trivia competition. Categories include: Movies, Music, Sports, Television, Celebrities, Politicians, Comedians and Commercials. After the trivia is done, the DJ begins - perhaps you might hit the dance floor!





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**Friday, August 26, 2011**

**7:30 – 8:30 a.m. Breakfast & Registration**

**8:30 – 10:00 a.m. Surviving the Storm of a Lifetime was Just the Beginning  
Shelly Hunter, FHFMA, MBA, CFO, St. John's Regional Medical Center  
Chris Knackstedt, CPA, MBA, CFO, St. John's Health System**

**Session Overview:**

On May 22, 2011, Joplin, Missouri experienced the deadliest single tornado in US history. Joplin lost 158 residents to the devastation, 8,000 homes were damaged and 400 businesses were lost. St. John's Regional Medical Center took a direct hit from the F-5 tornado and the facility was left unfit to care for patients. What happened next for St. John's is an inspiring story of picking up the pieces after the disaster, continuing to treat the community in their direst time of need and promising to rebuild for the southwest Missouri community.

Join us to hear first hand from Shelly Hunter what it was like to be on the scene of such a horrific event. She'll discuss how the employees pulled together in their most trying time and how help from within as well as local, state and federal programs are getting Joplin and St. John's back on their feet. There will be the sharing of many lessons learned in disaster preparedness and some time for St. John's Regional Medical Center's vision for the future.

**10:00 – 10:15 a.m. Break**

**10:15 – 11:45 a.m. Financial Assistance & Charity Care Panel Discussion  
Hilary Dolbee, FHFMA, MBA, CFO, Pratt Regional Medical Center (Moderator)**

**Session Overview:**

The following questions will be discussed by the panel participants: What are the top 3 things you think are "best practices" about your financial assistance policy? Where in the revenue cycle process do you begin to tell patients about your charity policy? Is your policy posted on your website? Do you hand out your policy to your patients at any time? Do you have a 3<sup>rd</sup> party help you with any aspect of your financial assistance program? Do you offer a prompt pay discount? If so how do you administer it? Do you offer a sliding scale for financial assistance? Once given do you apply charity retroactively?

**Panel Participants:**

1. Mike Quintero – Director, Patient Financial Services, Kansas University Hospital
2. Laraine Gengler – CFO, Lindsborg Hospital
3. Holly French – CFO, Newman Regional Hospital

**11:45 – 12:00 p.m. Closing Remarks & Attendance Prize Drawing**



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## Hotel Accommodations

A block of hotel rooms has been secured at The Westin Crown Center – Kansas City. The HFMA rate is \$140/night. (Standard rate is \$219/night.)

For online hotel reservations, click on the link below or call the hotel:

[2011 Healthcare Financial Management Association](#)

or paste the following link into your browser:

<http://www.starwoodmeeting.com/StarGroupsWeb/res?id=1106237208&key=6387>

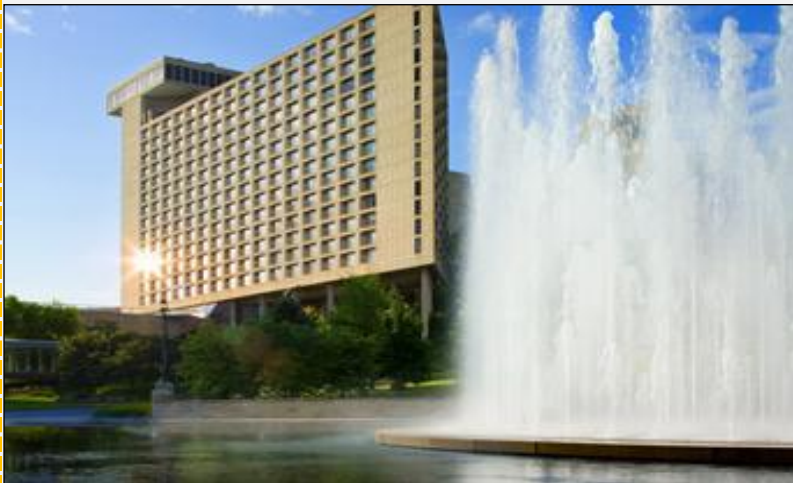
**HOTEL DEADLINE – GROUP RATE AVAILABLE UNTIL AUGUST 3, 2011 (SUBJECT TO AVAILABILITY)**

**The Westin Crown Center**

**1 East Pershing Road**

**Kansas City, MO 64108**

Ph: (816) 474-4400 | Fax: (816) 391-4438





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## Questions?

Questions concerning the conference can be directed to the following committee members:

Programs & Facilities	Devon Kim	<a href="mailto:dkim@haaseandlong.com">dkim@haaseandlong.com</a>
Vendor Fair	Amy Richter	<a href="mailto:arichter@hospice.org">arichter@hospice.org</a>
Dinner & Entertainment	Tracy Packingham	<a href="mailto:tracy@consumercollection.com">tracy@consumercollection.com</a>
Registration	John Maschger	<a href="mailto:john.maschger@libertyhospital.org">john.maschger@libertyhospital.org</a>
Certification	Jason Barb	<a href="mailto:JBARB@bkd.com">JBARB@bkd.com</a>

The 15<sup>th</sup> Annual 2011 Joint Conference Committee, made up of members of all four HFMA Chapters, has been working hard to bring you an educational & fun-filled conference. On behalf of the 15<sup>th</sup> Annual 2011 Joint Conference Committee, we hope to see you there!

## IMPORTANT – Additional Information to Note

**Certificates of Attendance** – will be available

### **Going GREEN: (Let us save waste and a few trees while we are at it!)**

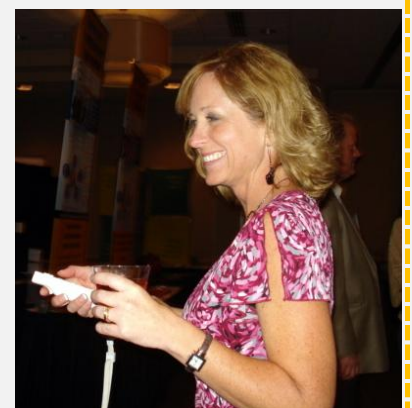
- In an effort to continue to go **GREEN**, we will not be making copies of the handouts
- To support this approach, we encourage you to bring your laptops with you to the conference and to each of the sessions so you can follow along from your PC
- There will be dedicated power charging stations in each meeting room for laptop and phone recharging

### **Presentation Handouts:**

Handouts will be uploaded to the web site of each chapter for attendees to print and bring with them to the conference. An email will be sent to all registrants with a link to the handouts approximately 48-72 hours prior to the conference.

This program brochure can be found on any of our websites.

Greater St. Louis – [www.hfmastlouis.org](http://www.hfmastlouis.org) | Show Me – [www.hfmashowme.org](http://www.hfmashowme.org)  
Heart of America – [www.hoahfma.org](http://www.hoahfma.org) | Sunflower – [www.kshfma.org](http://www.kshfma.org)





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## Registration

### The 15<sup>th</sup> Annual 2011 HFMA Joint Conference

August 24-26, 2011

The Westin Crown Center-Kansas City

Name \_\_\_\_\_  
 Title \_\_\_\_\_  
 Company \_\_\_\_\_  
 Phone (Required) \_\_\_\_\_  
 Email (Required) \_\_\_\_\_  
 Address \_\_\_\_\_  
 City, State, Zip \_\_\_\_\_

Member  Non Member   
 Chapter Affiliation \_\_\_\_\_  
 Member ID# \_\_\_\_\_

**Total Enclosed**

\$ \_\_\_\_\_

#### HFMA Members

- \_\_\_\_\_ \$195 received on or before August 12
- \_\_\_\_\_ \$225 received after August 12
- \_\_\_\_\_ \$125 Thursday only received on or before August 12
- \_\_\_\_\_ \$150 Thursday only received after August 12

#### Non Members

- \_\_\_\_\_ \$215 received on or before August 12
- \_\_\_\_\_ \$245 received after August 12
- \_\_\_\_\_ \$150 Thursday only received on or before August 12
- \_\_\_\_\_ \$175 Thursday only received after August 12

#### Students

- \_\_\_\_\_ \$75 received on or before August 12
- \_\_\_\_\_ \$100 received after August 12

Full conference includes all sessions, meals and reception

### Credit Card:

Pay Online:

<http://www.hfma.org/Greater-St-Louis-Heart-of-America-Show-Me-of-Missouri-Sunflower-Chapters-15th-Annual-2011-HFMA-Joint-Conference/>

### Email or Fax:

HFMA: Heart of America Chapter  
 Attn: John Maschger / Revenue Cycle Operations  
 Phone: (816) 407-2042  
 Fax: (816) 407- 4814  
[john.maschger@libertyhospital.org](mailto:john.maschger@libertyhospital.org)

### Check:

Please make your check payable to:  
 HFMA Heart of America Chapter  
 Please mail to:  
 HFMA: Heart of America Chapter  
 Attn: John Maschger / Revenue Cycle Operations  
 Liberty Hospital  
 2525 Glen Hendren Drive  
 Liberty, MO 64068

**Note** – Each attendee needs to fill out his/her own form completely. However, the payment can be combined.

**Cancellation Policy** – Cancellations received before August 12, 2011 – a full refund minus a \$50 processing fee per registrant will be granted. Cancellations received after August 12, 2011 – no refund will be granted.

*Substitutions are accepted and encouraged. Please send notification of the substitute by August 22, 2011.*