



Harmony

ACHIEVING BALANCE
AMIDST TODAY'S CHALLENGES

ALABAMA HFMA FALL 2011 FALL INSTITUTE
November 17-18, 2011 | Wynfrey Hotel, Birmingham

10a - 3p	EXHIBITOR SET-UP REGISTRATION
7a-12:30p	LATE REGISTRATION
7a-8a	CONTINENTAL BREAKFAST
8a-10:30a	WELCOME Recognition of New Members Building Work Life Balance and Successful Relationships Through the 7 Habits (Part 1) <i>Dr John & Jane Covey Franklin Covey</i>
10:30a-11a	BREAK IN EXHIBIT AREA
11a-12 noon	Information your CEO needs to compete in an era of transparency. <i>Greg Carlson, PhD Assistant Professor & Associate for Healthcare Consulting University of Alabama</i>
12:15p-1:15p	LUNCH & LEARN
CFO/Compliance	Maximizing Schedule H Charity Reporting with Minimal Financial Impact <i>Arvind Krishnaswami CEO Medlytix, Jack Hodge VP Business Development Medlytix & Jeremy Naess Senior Associate Dixon Hughes Goodman, LLP</i>
PFS	What does your personality say about you and how you manage? <i>Martha Forlines Consultant, Coach, Trainer, Author Belief System Institute</i>
1:30p-2:30p	TRACK BREAK-OUT SESSIONS
CFO	Medicare Reimbursement Impact: Wage Index & Quality, Alabama Policy Update <i>Ingram Haley Senior Vice President & CFO Alabama Hospital Association</i>
PFS	Managing Advantage Shadow Bills and the Impact on HITECH Reimbursement <i>Todd Doze President Healthcare Payment Specialists</i>
Compliance	Sanction Screening Programs for Healthcare Providers & Vendors <i>Tia Palka, MS, PCC Operations Director OIG Compliance NOW, LLC</i>
2:30p-3p	BREAK IN EXHIBIT AREA
3p-4p	TRACK BREAK-OUT SESSIONS
CFO	IRS Update <i>Judith Kindell Sr Technical Advisor for the Director, Exempt Organizations IRS</i>
PFS	Retrospective Denials Management-Weaving Together the Clinical, Technical, and Legal Components <i>Glen Reiner Director of Clinical Audit Adreima</i>
Compliance	Value Not Volume: The Right Care at the Right Time in the Right Place at the Right Cost <i>Gina McWilliams</i>
4p-5p	TRACK BREAK-OUT SESSIONS
CFO	EHR & HIPAA: Managing Compliance & Progress <i>Tracy Young, CPA Partner & Derek Pierce, CPA, CHFP Manager BKD, LLP</i>
PFS	Revenue Recovery Thought Leadership Panel <i>Dan Franklin Franklin Services, Greg Holcutt Hollis Cobb, Jeff Holloway Holloway Collections, Joe Uptain MedCo Services</i>
Compliance	Success Financial Testimony Strategies in Healthcare Litigation: An Expert Witness Perspective <i>Mike Costello, CPA/ABV/CFE, ASA, CFE Decosimo Advisory Services</i>
5:30p-6:30p	COCKTAIL HOUR & HORS D'OEUVRES iGen & New Member Reception
7a-8a	CONTINENTAL BREAKFAST
8a-10a	Building Work Life Balance and Successful Relationships Through the 7 Habits (Part 2) <i>Dr John & Jane Covey Franklin Covey</i>
10a-10:30a	BREAK IN EXHIBIT AREA
10:30a-12 noon	Taking the Cuss Out of Customer Service <i>Martin Sher Co-CEO AmSher Receivables Management</i>
12:15p-1:15p	Closing Session-Door Prizes & Give-Aways (<i>must be present to win</i>)

PRESENTER OVERVIEW

**8a-10:30a Thurs &
8a-10a Fri**

Building Work Life Balance and Successful Relationships Through the 7 Habits

Dr John & Jane Covey *Franklin Covey*

Dr. John M.R. Covey is Director of the Home and Family Division of FranklinCovey Co. He was heavily involved with his brother, Stephen R. Covey, in the design, development, and writing of the book, The 7 Habits of Highly Effective Families. Jane Covey also contributed stories and examples to the Families book, and co-authored The Proactive Family Guide Book with her husband John. Jane has also published numerous articles on parent/child relationships. John has participated on the Utah State Board of Education and was instrumental in the development of the statewide mission and strategic plan for public education. John has spent many years teaching business management, organizational behavior, and marketing. He was a professor at Brigham Young University and has worked for 22 years applying his expertise in the private sector. John received a Master's degree from Harvard in Business Administration and a Doctorate of Education at Brigham Young University.

Jane Covey has traveled widely as a public speaker. She has been a professional presenter and teacher in business, education, and family. She received her Bachelor of Science degree in Elementary Education and is currently in a Masters program. Jane lived in Australia for two years and assisted her husband as an administrator. She is the mother of seven daughters and three sons, and has over thirty grandchildren. John and Jane live in the Rocky Mountains of Utah with their children.

11a-12 noon

Information Your CEO Needs to Compete in an Era of Transparency

Greg Carlson, PhD Assistant Professor & Associate for Healthcare Consulting
University of Alabama-Birmingham

Greg Carlson, Ph.D., is an Assistant Professor and Associate for Healthcare Consulting in the Department of Health Services Administration. His teaching and research interests are focused on organizational culture, clinical quality, leadership, strategic management and the relationship of hospitals with members of their medical staffs. He earned his Ph.D. in Health Services Policy and Management from the University of South Carolina, a Master's degree in Health Administration from the University of Pittsburgh, and a Bachelor's degree from Southwest Minnesota State University in Business and Political Science. Prior to his career in academics Dr. Carlson worked as a healthcare executive for over 20 years, 11 years as the CEO of a 500-bed community hospital that resulted from the merger of two competing community hospitals. He serves as the chair of the board of PE 4 Life, an advocacy group focused on the health and academic performance of school age children, and he is the co-author of the book Leading Healthcare Cultures: How Human Capital Drives Financial Performance.

12:15p-1:15p

LUNCH & LEARN

CFO/COMPLIANCE

Maximizing Schedule H Charity Reporting with Minimal Financial Impact

Arvind Krishnaswami CEO *Medlytix*

With more than a decade of experience in industry evaluations, business strategies, data analytics, data mining and predictive modeling, Arvind has pioneered new analytical frameworks and solutions for a number of industries including brokerage, insurance, mortgage, automobile financing and others. Arvind has devoted years to evaluating the healthcare industry revenue cycle process - including patient process flow, patient collection and recovery systems, associated data and data architecture, government regulations, and financial impacts - through meetings with senior management at various hospitals as well as in-depth data analysis. This body of work has resulted in a new analytical model for analyzing healthcare data, which in turn transforms data into tremendous cost savings and improved margins. Prior to launching Medlytix, Arvind worked at Equifax Predictive Sciences where his duties included leading a team of consultants in identifying and solving complex problems using advanced technology and analytics across a spectrum of industries, including financial services, telecommunications and utilities, mortgages, personal finance, insurance, healthcare and brokerages. Arvind has significant experience in the design and development of generic, industry specific and customized scores utilizing data from credit databases, demographic databases and other sources. He was recently a panel member at the Consumer Bankers Association Conference discussing "Trends in Credit Scoring." He also has been a speaker at many industry conferences and has conducted training seminars and workshops on credit.

Jack Hodge VP Business Development Medlytix

Jack leads Medlytix's business development efforts, drawing from years of experience in the mergers, acquisitions, and start-ups of small-to-medium size businesses. He previously was a partner with Genesis Investment Partners, an Atlanta-based group investing in young companies primarily in the Atlanta and Washington D.C. areas. He also has served on the acquisition and financial review committees for this group. During the mid-1990s, Jack worked independently as a financial strategist and consultant to various companies ranging from healthcare to Internet firms. Jack participates on the board of directors of LearnSomething Inc., a leading producer of customized multimedia training and learning management for the retail pharmacy, healthcare, grocery and association sectors. He also serves on the finance committee of the Northeast Georgia Medical Center in Gainesville, Ga. as well as the board of the Good News Clinics, which provide free medical and dental services and prescription drugs to the indigent. Jack is an ag-economics graduate of the University of Georgia.

Jeremy Naess Senior Associate Dixon Hughes Goodman, LLP

Jeremy Naess serves as Senior Tax Associate with Dixon Hughes Goodman and spends the majority of his time working with the Firm's Nonprofit/Healthcare team. Jeremy focuses on a tax practice that includes charity care and community benefit requirements, board governance and education, IRS best policies and practices, executive compensation, and unrelated business income consulting for nonprofit organizations. Jeremy is a graduate of Brigham Young University.

PFS

What Does Your Personality Say About You and How You Manage?

Martha Forlines Consultant, Coach, Trainer, Author *Belief System Institute*

Martha is a successful human resources executive now consultant, coach, trainer, author and speaker. Her expertise is employee motivation and engagement. She has solutions for underperforming leaders, teams or organizations. Martha and her business partner have recently co-authored a book for women and leaders of women, Inspiring Women... BECOMING Courageous, Wise Leaders which speaks to women having the courage to make a difference, understanding the three keys to wisdom and developing confidence for extraordinary leadership. She joined Thad Green in his leader consulting business, Belief System Institute in 2007. BSI has been helping leaders and their teams for twenty years to quickly move performance from good to great using their proprietary motivation and engagement tools. Martha likes using a multi-disciplinary approach with her clients, using DISC behavior style tools, Green's own theory of motivation and engagement and appreciative inquiry to connect the dots quickly across organizations to improve results.

1:30p-2:30p

TRACK BREAK-OUT SESSIONS

CFO

Medicare Reimbursement Impact: Wage Index & Quality, Alabama Policy Update

Ingram Haley Senior Vice President & CFO *Alabama Hospital Association*

Ingram Haley is the Senior Vice President and CFO of the Alabama Hospital Association (AlaHA). He is responsible for AlaHA financial and reimbursement policy efforts and oversees AlaHA work with the Alabama Medicaid Assessment Program. He has been with the association for 1 year, with experience with the Virginia Hospital & Healthcare Association as Director of Financial Policy. He holds a BA from James Madison University, and MPA from Virginia Commonwealth University, and a MHA from the Medical College of Virginia.

PFS

Managing Advantage Shadow Bills and the Impact on HITECH Reimbursement

Todd Doze President *Healthcare Payment Specialists*

Todd Doze has more than fourteen years experience in healthcare finance working for various consulting firms and insurance companies. Utilizing HIPAA Electronic Data Interchange standards and technology, Mr. Doze has helped create automated solutions for complex healthcare reimbursement issues helping hundreds of hospitals across the country obtain additional federal and state reimbursement. Mr. Doze has performed large batch electronic eligibility matches with Medicare and over 35 state Medicaid agencies. Mr. Doze received a MBA from Texas Christian University in 1999, and his Bachelor's Degree from Southwestern University in 1997. He is a member of Healthcare Financial Management Association and has spoken at several Government reimbursement seminars and workshops. Mr. Doze is located in Fort Worth, Texas.

Compliance

Sanction Screening Programs for Healthcare Providers & Vendors

Tia Palka, MS, PCC Operations Director *OIG Compliance NOW, LLC*

Tia has a broad background in healthcare with over fifteen years of experience in life sciences, including strong expertise and certification in regulatory compliance. She has also held top level positions in global human resources with responsibility for compliance, safety, recruitment, training and performance management. Tia has a Master's degree from Princeton University and is a published author and patent holder. She is a Professional Certified Coach (PCC) and is certified in Leadership & Talent Management. Tia received six sigma green belt and lean six sigma training from Villanova University. She is a trained investigator for OIG Compliance NOW. Tia is a member of the Health Care Compliance Association (HCCA). Her article on OIG/GSA Sanction Screening appeared in the March 2011 issue of Compliance Today.

3p-4p

TRACK BREAK-OUT SESSIONS

CFO

IRS Update

Judith Kindell Sr Technical Advisor for the Director, Exempt Organizations *IRS*

Judith E. Kindell is a Senior Technical Advisor for the Director, Exempt Organizations. She joined the Exempt Organizations Division of the Internal Revenue Service in 1991 as a Tax Law Specialist. Prior to joining the IRS she was an attorney in private practice. Her education includes a B.S. (Accounting) from Arizona State University in 1983, J.D. from Columbia University School of Law in 1986 and LLM (Taxation) in 1995 from Georgetown University Law Center. Judith is a frequent speaker on political activity by tax exempt organizations and other issues involving tax exempt organizations. She was a member of the EO Healthcare Industry Specialization Team. She is the principal author of several revenue rulings, including Rev. Rul. 98-15 and Rev. Rul. 2007-41 and is the co-author of several CPE articles including "Election Year Issues".

PFS

Retrospective Denials Management-Weaving Together the Clinical, Technical, and Legal Components

Glen Reiner Director of Clinical Audit *Adreima*

Mr. Reiner has been in the healthcare industry for over 20 years. He began his career as a CNA and has spent that last 16 years as a Registered Nurse. He has extensive knowledge of CPT, HCPCS, Revenue and ICD-9 coding with particular experience in trauma coding. Glen has been instrumental in preparing Advanced Reimbursement Management to be the premier RAC defense resource for hospitals. His clinical audit/review experience includes; denials management, appeals/grievances, stop-loss, charge capture, insurance defense, pre-bill, charge/loc verification, regulatory verification/defense and patient inquiry.

COMPLIANCE

Value Not Volume: The Right Care at the Right Time in the Right Place at the Right Cost

Gina McWilliams Partner & CEO *RTMD*

As Partner and CEO, Eugenia McWilliams brings thirty years of experience in healthcare management to RTMD. From the time she graduated from the University of Alabama in 1981, Ms. McWilliams has worked exclusively in the fast-changing healthcare field. She was a senior consultant at Ernst & Whinney and served the Alliance of Healthcare Organizations. Ms. McWilliams is also President of Medical Management Plus, Inc., which for 20 years has provided fiscal and strategic business development for practices. Ms. McWilliams envisioned how real-time data could help medical care providers operate effectively, and developed a way to provide that information. Under her leadership, RTMD is setting a new standard for data accuracy and usability.

4p-5p

TRACK BREAK-OUT SESSIONS

CFO

EHR & HIPAA: Managing Compliance & Progress

Tracy Young, CPA Partner *BKD, LLP*

Tracy, a member of BKD National Health Care Group, has more than 13 years of experience at BKD and manages the audits of numerous health care providers, including rural community providers, urban hospital systems and long-term care facilities. He also provides Medicare and Medicaid consulting and cost report preparation and analysis, feasibility studies and strategic planning. He is a member of the American Institute of Certified Public Accountants, Arkansas Society of Certified Public Accountants and Healthcare Financial Management Association, where he currently serves as the treasurer for the Arkansas chapter. Tracy is a graduate of the University of Arkansas, Fayetteville, with a B.S. degree in business administration and accounting.

Derek Pierce, CPA, CHFP Manager BKD, LLP

Derek provides services to health care clients. His six years of experience include supervising audit engagements for several regional health systems. Derek also has assisted in budget preparations for small and midsize hospitals, helped prepare feasibility studies and tested hospitals' internal records for disproportionate share reimbursement eligibility. Prior to joining BKD, Derek was a member of the internal audit team at a publicly traded company. He is a member of the American Institute of Certified Public Accountants, Arkansas Society of Certified Public Accountants and Healthcare Financial Management Association, where he serves as the audit committee chairman of the Arkansas chapter. Derek is a Certified Healthcare Financial Professional (CHFP). Derek is a graduate of Tulane University, New Orleans, Louisiana, with a master's degree in accounting.

PFS

Revenue Recovery Thought Leadership Panel

Dan Franklin President/Owner Franklin Collection Service, Inc.

Dan founded Franklin Collection Service in 1980 and has recently celebrated 31 years in business. Since 1980 FCS has evolved into a nationally ranked Receivables Management Company. Dan, along with a dedicated staff runs the Company. Dan is committed to daily interactions with his staff, but most importantly, The Clients. Dan takes great pride in the impeccable reputation as one of the fastest growing privately held businesses in America. The commitment of long term loyal Clients plays a major role in the success of Franklin. Dan is an active member of ACA and HFMA nationally.

Greg Hocutt COO Hollis Cobb Associates, Inc.

Greg Hocutt would like to be selected for the panel representing Hollis Cobb Associates, Inc. Greg is the CEO of Hollis Cobb, a receivable management professionals corporation. He has been in the collections industry for over 15 years in many lines of business including: Government, Debt Purchase, Liquidation, Telecom, Commercial, and Consumer. He has extensive experience in the hospital medical revenue cycle of the collections arena, with an array of all other related Medical collection lines, such as physician billing and Extended Business Office efforts. He has also partnered with very large hospital systems throughout the Southeast, helping them find solutions to meet their needs. He has a strong technological background and has been a guest speaker at many industry conferences, as well as several software vendors' conferences. Greg received the 2005 Birmingham Top 40 Under 40 Award.

Jeff Holloway President Holloway Credit Solutions, LLC

Jeff Holloway, MBA joined the Credit Bureau of Montgomery in 1992 after completing graduate studies at Tulane University in Mathematical Economics and Finance. Over the next 10 years he worked with local and regional financial institutions developing credit score based marketing and risk management systems. In 2003 the Credit Bureau of Montgomery became Holloway Credit Solutions and the company transformed into a medical billing and collection agency. Professionally Jeff has served as state President of the Associated Credit Bureaus, advisory board member to Experian and a board member of the American Collectors Association. Jeff has spoken on topics such HIPAA privacy laws, credit modeling and point of service cash collection. As a member of the Healthcare Financial Management Association, he has also spoken on the impact of bankruptcy laws on hospitals, Medicare cost reporting, and data mining to improve cash recovery / reduce costs in a medical environment.

Joe Uptain President & CEO MedCo Services

Joe Uptain is the President and CEO of MedCo Services, an accounts receivables management company in Huntsville, AL. After attending Auburn University in 1988 he worked as the Lead Medical Collector for a State Senator and was also a Reimbursement Manager overseeing all billing and follow up for PCS, Inc. He founded MedCo Services in 1994 and grew it from a one-man operation to a thriving company of 115 employees offering cutting edge solutions for physicians and Hospital business offices. Joe has been a member of HFMA for 15 years.

COMPLIANCE

Success Financial Testimony Strategies in Healthcare Litigation: An Expert Witness Perspective

Mike Costello, CPA/ABV/CFF, ASA, CFE Principal Decosimo Advisory Services

Mike Costello is director of litigation services for Decosimo Advisory Services, a division of Joseph Decosimo and Company. He is also a managing principal of Decosimo Corporate Finance, LLC. Mike is a certified public accountant (CPA), certified in financial forensics (CFF), a certified fraud examiner (CFE), an accredited senior appraiser (ASA), accredited in business valuation (ABV), and a consultant with more than 30 years of training and experience in business valuations, business acquisitions and divestitures, and related fields. Mike's experience includes extensive consulting work and testimony in tax, accounting, financial, economic, and business issues of commercial litigation, with emphasis on business valuation, economic damage and forensic accounting issues in the healthcare industry.

10:30a-12 noon

Taking the Cuss Out of Customer Service

Martin Sher Co-CEO AmSher Receivables Management

Martin Sher has owned his own businesses for 38 years with his business partner and brother, David Sher. He was 21 years old, when he took over the family business of about 40 people at a company called Mr. King Furniture. He founded a number of companies including Happy Rents, Legal Locator Nationwide, Diamonds Now, and AmSher Collection Services and AmSher Outsourcing. Today, he has more than 100 employees in a 9 story office building on top of Red Mountain. He and his brother David have received numerous business and professional awards and recognition over the years including: becoming an Inc. 500 company and an Inc 5000 company, Small Business Person of the year, Business Advocate of the Year, and Entrepreneur of the year for the Birmingham Area Chamber of Commerce. He is immediate Past-president of ACA International, the Association of Credit and Collection Professionals, and is serving his last year on the Executive committee in an advisory role.



Harmony
ACHIEVING BALANCE
AMIDST TODAY'S CHALLENGES

ALABAMA HFMA FALL 2011 FALL INSTITUTE
November 17-18, 2011 | Wynfrey Hotel, Birmingham



hfma™ alabama chapter
healthcare financial management association