



hfma<sup>®</sup>

healthcare financial management association

January 17, 2007

Dear Idaho Chapter hfma Members and Associates:

Please make plans now to attend our Winter Meeting to be held Wednesday, February 28, 2007, at the *Red Lion Templins on the River*, Post Falls, Idaho. See the enclosed agenda for our outstanding line-up of education for this meeting!

A block of rooms is being held for Wednesday and Thursday nights for a \$65 rate. To place your lodging reservations call the *Red Lion Templins on the River* at **208/773-1611** or on the web at **<http://redlion.rdlm.com/>** and tell them you are with the hfma group.

I encourage you to *make your reservations early as the room block will expire February 7, 2007!*

To register for the meeting, please complete the registration form below and mail it along with payment to our chapter Treasurer, Chris Brazil. Dress is business casual. I look forward to seeing you all there! If you have questions, you can reach me at 509.242.0874 or [lmzarecor@dzacpa.com](mailto:lmzarecor@dzacpa.com).

Sincerely,

A handwritten signature in black ink, appearing to read "Luke Zarecor", written in a cursive style.

Idaho Chapter hfma President Elect/Program Chair



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## Registration Form

Please print and return this registration form with your payment by February 21, 2007

Note: Make your room reservations before February 7, 2007.

**No refunds will be made for cancellations within seven days of the event.**

Name: \_\_\_\_\_ Title: \_\_\_\_\_

Organization/Affiliation: \_\_\_\_\_

Address: \_\_\_\_\_

E-mail \_\_\_\_\_

Member of hfma: Idaho Chapter: Yes \_\_\_\_\_ No \_\_\_\_\_ Other Chapter \_\_\_\_\_

**Registration Fee:** Member \$200.00 \_\_\_\_\_ Non-member \$230.00 \_\_\_\_\_

**Second Member FREE** \_\_\_\_\_

Student \$25.00 \_\_\_\_\_ Covered by hfma corporate sponsorship \_\_\_\_\_

Make check payable to **Idaho Chapter hfma** and mail with registration form to:

**Chris Brazil**  
**QUE Financial**  
**(208) 672-7232**  
**8948 W. Barnes St.**  
**Boise, ID 83709-1679**



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# Idaho HFMA

**February 28 - March 2, 2007**

**Red Lion Templins on the River**

**414 E 1st Ave., Post Falls, Idaho 83854**

**Phone: (208) 773-1611**

<b>Wednesday, February 28</b> 6:00 p.m.	<i>New Member Dinner - The White House Grill</i> 712 N. Spokane St. Post Falls, ID 83854 Phone (208) 777-9672
<b>Thursday, March 1</b>  8:00 a.m. - 12:00 p.m.	<i>Payers are from Mars/Hospitals are from Venus.... Or So It Seems (when it comes to claims payments)</i> <b>Davina C. Lane</b> , Executive Consultant, Sinaiko Healthcare Consulting <b>Ilene Flocks</b> , Senior Consultant, Sinaiko Healthcare Consulting
1:15 p.m. - 2:45 p.m.	<b>Concurrent Session A</b> <i>Best Practices in Preparing an Effective Management Discussion and Analysis</i> <b>James C. Lanzarotta</b> , CPA, Business Assurance Partner, Not-For Profit/Government Services Group, Moss Adams LLP
1:15 p.m. - 5:00 p.m.	<b>Concurrent Session B</b> <i>Understanding the Purpose, Data Content and Transitioning the Role of the UB-92</i> <b>Suzanne Lestina</b> , CHPF, CPC, Technical Manager, PFS/Revenue Cycle; HFMA
3:00 - 5:00 p.m.	<b>Concurrent Session A</b> <i>Segregation for Critical Access Hospitals - A Key Tool for Improving Reimbursements</i> <b>Kendal R. Noller, P.E.</b> , Cost Segregation Analyst, Moss Adams LLP <b>Lori K. St. Marie</b> , CPA, Senior Tax Manager, Moss Adams LLP
<b>Friday, March 2</b> 8:30 a.m. - 9:30 a.m.	<i>Speeding to Effective Time Mastery</i> <b>Dr. Jerry V. Teplitz</b> , Jerry Teplitz Enterprises, Inc.
9:30 a.m. - 12:00 p.m.	<i>Increasing Your Leadership Power While Managing Your Stress</i> <b>Dr. Jerry V. Teplitz</b> , Jerry Teplitz Enterprises, Inc.

Wednesday, February 28

6:00 p.m.

New Member Dinner - The White House Grill  
712 N. Spokane St. Post Falls, ID 83854 Phone (208) 777-9672

Thursday, March 1

8-12:00 p.m.

*Payers are from Mars/Hospitals are from Venus....  
Or So It Seems (when it comes to claims payments)*

**Topic Discussion -**

- Payor and contracting perspective
- Why do we fail to understand each other when we negotiate the terms of contracts which set the stage for claim payments?
- What are the key elements of contracts that impact billing/payment/collections?
- Why do actual payments differ from expected reimbursement?
- Provider perspective
- Common provider pitfalls
- What providers can do to preempt or troubleshoot (manage) payor errors

**Davina C. Lane**, Executive Consultant, Sinaiko Healthcare Consulting

*Davina Lane provides senior counsel to health plans, hospitals, managed care organizations and academic medical institutions represented by the firm. Ms. Lane's areas of focus include complex payer/provider matters, including strategy, operations, reimbursement, contracting and litigation support, as well as executive level health plan management issues. Ms. Lane has been hailed as a "health care visionary" (St. Louis Commerce Magazine, July 2001) for her leadership of two major Midwestern health plans owned by Coventry Health Care, Inc. She was chief executive officer of HealthCare USA of Missouri from 1996 to 1999 and chief executive officer of Group Health Plan from 1999 to 2001, then returned to HealthCare USA until February of 2004. Healthcare USA is a Medicaid HMO, thereby giving her tremendous insight into the issues faced by payors and providers operating under Federal Program guidelines.*

**Ilene Flocks**, Senior Consultant, Sinaiko Healthcare Consulting

*Ilene Flocks brings 16 years of highly specialized experience in a wide range of revenue cycle functions at major hospitals and health systems, including charge master coordination, revenue and medical auditing, APC coding and virtually all operational requirements associated with the billing process. Her experience, intimate understanding of revenue cycle processes down to their base, system levels and big picture perspective provide the depth of technical sophistication and leadership critical to clients' success in these revenue cycle and compliance arenas.*

1:15-2:45 p.m.

**Concurrent Session A**

*Best Practices in Preparing an Effective  
Management Discussion and Analysis*

**Topic Discussion -**

- GASB 34 minimum requirements for MD&A
- Information that should be excluded from the MD&A
- Ideas on how to go beyond the numbers and provide meaningful information

**James C. Lanzarotta**, CPA, Business Assurance Partner, Moss Adams  
Non-for-Profit/Government Services Group

*Jim is the leader for the firm's governmental services group, and his area of practice includes government and not-for-profit organizations including hospital districts, cities, port authorities, universities, colleges and college foundations, counties, sewer and water districts, and numerous non-profit organizations. He has significant experience conducting audits in accordance with Government Auditing Standards and U.S. Office of Management and Budget Circular A-133, Audits of States, Local Governments, and Non-Profit Organizations. He is a current member of the AICPA State & Local Government Expert Panel responsible for reviewing proposed GASB accounting standards, and has served on the GFOA Special Review Committee that reviews CAFRS submitted by members for the Award of Excellence program in Financial Reporting.*

1:15-5:00 p.m.  
Concurrent Session B

*Understanding the Purpose, Data Content  
and Transitioning the Role of the UB-92*

**Topic Discussion -**

Revenue cycle leadership and staff, information technology staff, and staff involved in the data gathering, revenue capture, and medical coding process must understand the changing healthcare environment and the need for an adoption of a new paper claim form and its electronic equivalent. This live course will provide a comprehensive review of the required data elements, with a crosswalk from the UB-92 to the UB-04. A highlight of the significant changes to the 837I-5010 will also be discussed. The participants will learn what key activities must be completed in order to ensure a successful conversion. We will review the impact of two industry changes, the National Provider Identifier (NPI) and Present on Admission (POA) indicator and the impact these changes will have on reimbursement, data analysis and pay for performance initiatives. Finally, we will look at the responsibilities of accurate reporting of administrative/UB04 data for hospital accountability and public reporting.

Attendees will learn:

- Industry needs
- Difference between the paper claim form and its electronic equivalent
- Preparing for changes today, tomorrow, and in the future
- UB-92 crosswalk to the UB-04 form locators
- Key changes to the 837I-5010
- Activities for a successful conversion
- The impact of the NPI and POA Indicators
  - NPI implementation
  - POA implementation
- Review of administrative data

**Suzanne Lestina**, CHPF, CPC, Technical Manager, PFS/Revenue Cycle HFMA

3:00-5:00 p.m.  
Concurrent Session A

## Cost Segregation for Critical Access Hospitals - A Key Tool for Improving Reimbursements

### Topic Discussion -

What is Cost Segregation; how does cost segregation impact your Medicare/Medicaid reimbursements; how cost segregation applies to Critical Access Hospitals; what are the timing issues of having a cost segregation study.

#### **Kendal R. Noller, P.E., Cost Segregation Analyst, Moss Adams LLP**

*Kendal's background includes Project Management for a large, regional property management and real estate developer where he managed the construction of a variety of projects ranging from large commercial, multi-residential to special design facilities.*

*Kendal holds a Bachelor of Science degree in Mechanical Engineering from Cedarville College in Ohio. His experience includes construction project management and site supervision as well as engineering design.*

*Kendal is a cost segregation analyst in the Spokane office cost segregation practice. His hands-on construction experience, coupled with an engineering background, provide the technical expertise needed to define and segregate the costs associated with a construction project.*

#### **Lori K. St. Marie, CPA, Senior Tax Manager, Moss Adams LLP**

*Lori is a Senior Tax Manager with more than 20 years of experience in public and private accounting. Lori has been with Moss Adam's Spokane office for five years. Prior to Moss Adams, Lori worked for a national accounting firm and a multi-national manufacturer in Spokane, Washington as a Tax Manager. Lori is a member of Moss Adams' State and Local Tax Niche and International Niche.*

*Lori has a Bachelor of Science degree in Economics from Santa Clara University and a Masters of Science in Taxation from Gonzaga University. She is a licensed CPA in the state of Washington, and is a member of the WSCPA as well as serving on the Taxation Committee.*

*Lori is the Senior Manager in our Spokane office Cost Segregation practice. In this specialized practice she provides technical expertise in the segregation of building components into shorter depreciable life categories.*

**Friday, March 2**

8:30-9:30 a.m.

### *Speeding to Effective Time Mastery*

**Topic Discussion -**

How do you effectively deal with the constant deadlines, conflicting priorities, meetings, as well as the other time challenges that you are faced with on a daily basis? With this program you will gain an understanding and ability to be a better time manager. You will discover your present time management strengths as well as the areas needing improvement. As a result, you will leave with a strategy and action plan to develop and implement more effective time management skills in your life.

9:45 - 12:00 p.m.

### *Increasing Your Leadership Power While Managing Your Stress*

**Topic Discussion -**

Have you ever had a negative and stressful day as a leader? How did you feel at the end of it? Tired, drained... Now, have you ever had a positive upbeat day as a leader? 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 abilities and success being a leader? 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 levels resulting in more effective leadership capabilities.

**Dr. Jerry V. Teplitz;** Jerry Teplitz Enterprises, Inc.

*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.*

*At that point, Jerry's career took a dramatic change of direction. Jerry studied and received a Masters and Doctorate Degree in Holistic Health Sciences from Columbia Pacific University. He was on the faculty of the U.S. Chamber of Commerce Institute for Organization Management for eight years.*

*Dr. Teplitz has been a field manager for the Carlson Learning Company for the past twenty-four years and President of his own speaking and consulting firm for over twenty-nine years. Jerry conducts seminars in the areas of stress management, leadership and sales development.*

*The list of clients Dr. Teplitz has spoken and consulted for includes such organizations as HFMA Chapters of Nevada, Arizona, Georgia, and South Carolina. In addition, he has spoken to Century 21, Holiday Inns, International Management Council, Sales and Marketing Executives, EDS, American Bankers Association, American Society of Association Executives, plus over four hundred colleges and universities across the United States and Canada.*

*Jerry is the author of the book Managing Your Stress: How To Relax and Enjoy, and his two latest books are Switched-On Living and Brain Gym for Business. Articles on Jerry have appeared in such publications as Successful Meetings, Prevention, and Plane and Pilot. He has also been listed in several editions of Who's Who in America.*

*As a professional speaker, he has spoken to over one million people. Dr. Teplitz has also been honored by his peers in the National Speakers Association by receiving the title of "Certified Speaking Professional" and has been selected as "Top Rated Speaker" by the International Platform Association.*