Kentucky HFMA chapter is excited to offer an interactive agenda with an emphasis on Provider Collaboration. Providers who are truly “Leading the Change”

INTERACTIVE TOPICS INCLUDE:

COMMUNICATE WITH STRENGTH

COMBINING FORCES – COMPETITIVE COLLABORATION LEADS TO COST SAVINGS SUCCESS FOR BAPTIST HEALTH & NORTON HEALTHCARE

EMPLOYED PHYSICIAN NETWORK ROUNDTABLE

MEDICAL PRACTICE IN AMERICA, PAST, PRESENT AND FUTURE

ICD-10, MOVING FORWARD
THURSDAY, OCTOBER 23, 2014

7:30 – 8:00  REGISTRATION / BREAKFAST

8:00 – 8:15  WELCOME, OPENING REMARKS

  Don Frank – KY Chapter HFMA President

8:15 – 9:45  KEYNOTE SPEAKER: COMMUNICATE WITH STRENGTH

  Keynote Speaker: Karen Purves

  Communicate With Strength - Key Words That Undermine Your Effectiveness - Got the right words? Laugh and learn in this high energy, fun-filled, humorous session offering the latest solutions in effective communication for healthcare financial managers. What are you saying that’s unintentionally causing people to feel defensive and uncooperative? Karen will tell you - and give you replacement words and phrases! Leave with an immediate, specific, action plan to talk smart, and achieve noticeable results!

9:45 – 10:00  MORNING BREAK 1

10:00 – 11:00  GENERAL SESSION: MEDICAL PRACTICE IN AMERICA, PAST, PRESENT AND FUTURE

  Speaker: Kurt Mosley – Merritt Hawkins

  How has medical practice evolved over the last 100 years? What are the prevailing characteristics of medical practice today, and where is medical practice headed in the future?

  These and related questions are addressed in this timely and thought provoking presentation by Merritt Hawkins, the leading physician search and consulting firm in the United States.

  The presentation traces the roots of medical practice in the U.S., from the pre-Flexner Report era to today’s medical profession with its over 200 certified specialties. Issues examined include current and historical physician supply and demand trends, training, compensation patterns and practice types. Executives with Merritt Hawkins also project how healthcare reform and related changes will reshape the way physicians practice and are paid, with a look at value based compensation, the team-based approach to care, medical homes, “complexivists,” concierge practice and more.

  An engaging and instructive look at where physicians has been and where they are going, “Medical Practice in America: Past, Present and Future,” is a presentation likely to interest doctors, health facility administrators and anyone else who follows today's evolving healthcare trends.
SCHEDULE

11:00 – 11:15  MORNING BREAK 2
11:15 – 12:15  BREAKOUT SESSION 1

SESSION A: COORDINATED CARE TRANSITIONS AND POST-ACUTE INTEGRATION

Speakers: Kristi Short – Navvis Healthways

With this presentation, participants will gain a working understanding of:

1. The strategic mandate and compelling hospital economics associated with tightly coordinate care transitions to a high quality, accountable post acute provider network to position organizations for success under surging value-based care episode contracting.
3. Building on this aligned PAC network to reduce episodic spend and outcomes variation and position health systems and physician networks for bundled contracts and population health management.

SESSION B: 340B UPDATE

Speaker: Daniel Soldato – Wyatt, Tarrant & Combs, LLP

The 340B Drug Discount Pricing Program is a program authorized by Federal statute that allows certain hospitals, clinics and other qualifying healthcare entities to receive discounts on certain covered outpatient drugs from pharmaceutical manufacturers. This program is vital to many hospitals and other healthcare entities that serve uninsured and indigent patient populations, as it allows them to purchase expensive drugs at discount prices, thereby freeing up funds to be used to serve patients and otherwise accomplish their healthcare missions. The Health Resources and Services Administration (HRSA) is the government agency charged with administering the program. The program has grown rapidly since the enactment of the Patient Protection and Affordable Care Act, which expanded the types of providers eligible for drug discounts. Due to this expansion, HRSA has been planning to issue a “mega-regulation,” which addresses concerns of stakeholders in the program and clarifies the obligations of participants. However, due to recent case law developments, HRSA’s authority to issue such a regulation is in question.
The presentation will focus on the history of the 340B Drug Discount Pricing Program and the key rules and regulations by which participants must abide. I will also discuss challenges for providers in administering and monitoring their drug discount program to ensure compliance. Finally, I will provide an update on pending court cases that will impact the 340B Drug Discount Pricing Program and how these may impact the future of the program.

12:15 – 1:15  LUNCH & LEARN – UPDATE ON KY CHAPTER OPPORTUNITIES

1:15 – 2:30  GENERAL SESSION: EMPLOYED PHYSICIAN NETWORK ROUNDTABLE

*Facilitator– Andy Strausbaugh, Norton Brownsboro Hospital*

*Panelists – Ginger Figg, Norton Medical Group*

Todd Hightower, Highlands Health System

Matt Ullum, Healthcare Strategy Group

Dr. Glenn Loomis, St. Elizabeth Physicians

Successful hospital-physician integration is widely regarded as an essential element to any successful organizational response to mounting demands for higher quality, lower-cost patient care.

These leaders are helping Kentucky face the on-going challenges and share their visions for the future state of healthcare.

2:30 – 2:45  AFTERNOON BREAK 1

2:45 – 3:45  BREAKOUT SESSION 2

**SESSION A: ICD-10 – MOVING FORWARD**

*Speaker: Heather Greene – Kraft Healthcare Consulting, LLCs*

In this presentation, Heather Greene will discuss how the delay of ICD-10 has affected the industry. With CMS estimating a financial impact of $1 billion to $6.6 billion, it is critical to consider how the delay is affecting the bottom line. Moving forward, what needs to be done to train your team, implement ICD-10 and protect your bottom line?

**SESSION B: COMBINING FORCES – COMPETITIVE COLLABORATION LEADS TO COST SAVINGS SUCCESS FOR BAPTIST HEALTH & NORTON HEALTHCARE**

*Speakers: Mike Reeves – Baptist Health and George Hersch – Norton Healthcare*

In January 2014, Baptist Health and Norton Healthcare announced the formation of a joint supply chain purchasing agreement with Medline Industries, Inc. in an effort to reduce medical supplies costs.
At the time the agreement was announcement, estimates suggested a potential $15 million in savings over the five-year contract period. The healthcare industry has seen an uptick in “competitive collaboration” efforts as a way to become more efficient. Mike Reeves, Baptist Health System Executive, Supply Chain Services, and George Hersch, Norton Healthcare Vice President, Materials Management, will provide insight into the drivers which led to collaboration between their organizations and the results that followed.

3:45 – 4:00  AFTERNOON BREAK 2

4:00– 5:00  GENERAL SESSION: KHA UPDATE

Speaker: Steve Miller – Kentucky Hospital Association

Attendees will be provided with information and updates related to the state of the industry.

6:00 – ???  SOCIAL EVENT: “NIGHT AT THE RACES” – EMBASSY SUITES

Our chapter has hired a company that will simulate a day at the races on the big screen. It will include 10 races along with betting windows and “race forms” for you to fill out. No money required. KY HFMA will be providing prizes, food and drinks. Derby hats are welcome and encouraged.

NOTE: Jeans can be worn on Friday with a $5 donation or food donation for God’s Pantry which will be collected at the registration desk.
FRIDAY, OCTOBER 24, 2014

7:30 – 8:00 REGISTRATION / BREAKFAST

8:00 – 9:15 GENERAL SESSION: ESTABLISHING DEFENSIBLE PRICING IN TRANSPARENT TIMES

   Speaker: Jamie Cleverley – Cleverley & Associates

Hospital pricing continues to receive scrutiny from media and community groups. In light of this increased attention, how do hospitals create a pricing strategy that is not only defensible to the community, but also sensitive to net revenue implications? The session will address this issue with three primary objectives:

   • To provide information regarding critical hospital pricing relationships
   • To present hospital pricing trends in the US
   • To describe how a hospital can implement a defensible pricing strategy that respects the bottom line

9:15 – 9:30 MORNING BREAK 1

9:30 – 10:30 BREAKOUT SESSION 1

SESSION A: PCI COMPLIANCE – BEST PRACTICES IN CARD ACCEPTANCE AND DATA SECURITY

   Speaker: Matthew Rozen – J.P. Morgan

This session will address the trends in merchant services PCI compliance and data security processes to assist in ensuring cardholder information remains safe. A review of the latest technology available, including tokenization, encryption and EMV chip, will provide insight on potential tools to help further reduce merchant services related fraud. Specific to healthcare, PCI Compliance is becoming a more critical focal area of compliance due to the increased levels of card acceptance among patients. Comprised data could impact patient satisfaction, so we will offer guidance on how to introduce card payments into the patient registration process safely.
SESSION B: CONSUMER DRIVEN HEALTH CARE, HIGH DEDUCTIBLE HEALTH PLANS HISTORY, PRESENT AND FUTURE IMPACT ON PATIENT RESPONSIBILITY AND FINANCING

Speaker: James (“Jim”) Gandolfo – PNC Healthcare

There is a rich (legislative and regulatory) history that surrounds the growth of Consumer Driven Health Care and their associated financing accounts) Health Savings Accounts, Health Reimbursement Arrangements and Flexible Savings Accounts.

This session details the evolution of Consumer Driven Health Care, the regulatory and legislative events that created Health Savings Accounts in particular. We believe it is imperative that administrators understand the difference between the plans and their financing accounts, with respects to their impact on patient responsibility and corresponding financial impact to providers. The speaker was directly and indirectly responsible for legislation that created Health Savings Accounts specifically.

Additionally, this session will detail specific ways to access patient responsibility; how to prepare for the projected proliferation High Deductible Health Plans (HDHPs) purchased through the (planned) Health Insurance Exchanges (HIXs). Recently released (pending) regulations from HHS relative to Actuarial Value indicate that HSA compatible (HDHPs) have been embraced by HHS as the Bronze/Silver level standard option. Coupled with the reality that many companies may choose to replace their standard PPO plans with HDHPs (to avoid the so called Cadillac Tax) due to go into effect in 2018, means that millions of Americans may be insured by these plans and will be using their HSAs to fund the patient responsibility below the deductible. In any case finance, human resource and other professional staff must understand and be equipped to handle the changing financing options.

10:30 – 10:45  MORNING BREAK 2

10:45 – 12:00  GENERAL SESSION: MERGERS & ACQUISITIONS

Speaker: John Shumate – ValuLogik

John Shumate, CEO of ValuLogik, will hold an in-depth discussion on the current M&A climate for healthcare companies. Market trends, recent deal activity, and valuation metrics will be covered in a data-focused presentation. Pulling from his background in mergers and acquisitions, private equity, early-stage incubation, and valuation analytics, John will cover a variety of perspectives that are sure to resonate with everyone in attendance.
### Upcoming Confirmed Events

<table>
<thead>
<tr>
<th>Date</th>
<th>Event</th>
<th>Location</th>
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<tbody>
<tr>
<td>November 12, 2014</td>
<td>PFS &amp; Accounting Workshop</td>
<td>U of L Shelby Campus, Louisville, KY</td>
</tr>
<tr>
<td>January 22-23, 2015</td>
<td>Winter Institute</td>
<td>Hyatt Regency, Louisville, KY</td>
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<tr>
<td>March 19-20, 2015</td>
<td>Spring Institute</td>
<td>Hilton Downtown, Lexington, KY</td>
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<tr>
<td>March 22-24, 2015</td>
<td>Region IV Conference</td>
<td>Maryland</td>
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Please check www.hfmaky.org for more information.
COMMUNICATE WITH STRENGTH: KAREN PURVES, M.A.

Karen’s inspiring, engaging and witty style blends relatable personal stories, leading edge research and proven solutions to truly impact your attendees so they can leave a program saying their time was truly well spent. As an award winning International Speaker with particular expertise in how language affects emotions, Karen knows how to connect with audiences as few others can. In mathematical form, Karen could be = Energizer bunny + Drew Carey + Wikipedia + Tina Fey.

In addition to being described as “one of the best” or “favorite” speakers of entire conferences dozens of times, other attendee comments include: “Refreshingly honest”, “contagiously enthusiastic”, “attention grabber and keeper”, “breath of fresh air” and giving “real answers to real life”.

Karen combines a Bachelor’s Degree in Business, Master’s Degree in Environmental Public Policy and over 20 years business experience along with extensive training at “The Second City” to leave audiences feeling energized, inspired and empowered. Karen also has the rare distinction of being a 3-time game show winner!

Throughout the US, Canada, Europe, Asia and Australia - from Fortune 100 companies to associations and government - Karen guarantees that attendees will receive useful material, in an engaging way, and practical tools to implement immediately!

MEDICAL PRACTICE IN AMERICA, PAST, PRESENT AND FUTURE: KURT MOSLEY – MERRITT HAWKINS

Kurt Mosley is Vice President of Strategic Alliances for Merritt Hawkins, the leading physician search and consulting firm in the United States. His presentation, “Medical Practice in America: Past, Present, and Future”, traces the roots of medical practice in the U.S., from the colonial times to today’s medical profession with its 200 certified specialties. A complete description of the presentation is attached.

Mr. Mosley has addressed over 90 healthcare professional organizations over the last two years reaching over 5,000 industry leaders. In that time period, he has spoken to HFMA chapters in Alabama, California, Hawaii, Illinois, Indiana, Maryland, Missouri, Montana, Nebraska, Oklahoma, Pennsylvania, Texas, and Wisconsin.
Mr. Mosley was the keynote speaker for both the First Illinois HFMA and Alabama HFMA conferences earlier this year.

Kevin McPoyle, President of the Metro Pennsylvania/Philadelphia HFMA, gave a strong recommendation for the presentation, saying “Mr. Mosley’s presentation was very well received -- with many in attendance commenting on how it was the most informative and interesting presentation of the day. I am so glad he was able to participate in our conference”.

At Merritt Hawkins, we strive to be the thought leader in the healthcare industry. We are noted for many nationally-renowned surveys, white papers, and books by The Wall Street Journal, The New York Times, Fortune, Modern Healthcare, Health Affairs, and many other publications.

Our most recent survey, the 2014 Review of Physician and Advanced Practitioner Recruiting Incentives, tracks the starting salaries, signing bonuses, and other perks commonly used by hospitals and other healthcare facilities to recruit physicians. The Review is a key tool to ensure physician recruiting programs incorporate incentives that are both customary and competitive.

The survey was recently featured in an article on the Healthcare Financial Management Association website: http://www hfma org/Content aspx?id=23649.

**SESSION A: COORDINATED CARE TRANSITIONS AND POST-ACUTE INTEGRATION:**

**Tracey Moffatt, COO – Wellmont Health System and Kristi Short – Navvis Healthways**

Kristi Short leads care continuum strategies, post-acute alignment and network development engagements for health system clients. With more than 20 years of experience in strategic planning, business development and strategy implementation in the healthcare and financial services industries, she brings a valuable perspective to her work with client organizations having led broad-based initiatives in two heavily regulated and dynamic sectors. Prior to joining Navvis Healthways, she worked for Centerre Healthcare and HealthSouth as VP of Development where she served as the lead developer in orchestrating post-acute hospital joint ventures with large academic medical centers as well as smaller community providers. Previously, she directed planning activities for BJC Healthcare in St. Louis, MO. Before entering the healthcare industry, Kristi worked in the financial services area. She served as senior vice president with responsibility for strategic planning and oversight of the electronic payments operations for the Eighth Federal Reserve District. She also chaired several Federal Reserve Subcommittees during her 13-year tenure.
Daniel Soldato is a member of the Firm's Health Care Service Team and focuses his practice on corporate services and regulatory matters for healthcare organizations.

1:15 – 2:30

EMPLOYED PHYSICIAN NETWORK ROUNDTABLE

Facilitator– Andy Strausbaugh, Norton Brownsboro Hospital
Panelists – Ginger Figg, Norton Medical Group
   Todd Hightower, Highlands Health System
   Matt Ullum, Healthcare Strategy Group
   Dr. Glenn Loomis, St. Elizabeth Physicians

Andy Strausbaugh is the Vice President – Finance and Operations for Norton Brownsboro Hospital. He holds a Bachelor of Arts Degree in Business Administration from Hanover College and a master of Health Administration from Indiana University. In 2010-2011, Andy served as the President of the Kentucky Chapter – HFMA. In 2012-2013, he served as the Regional Executive for HFMA Region 4 which covers the Kentucky, North Carolina, Maryland, Virginia/DC and West Virginia Chapters of HFMA. Andy continues to be involved in HFMA and is currently serving on a National HFMA Task Force looking a Volunteer Initiatives.

Ginger Figg joined Norton Healthcare in November 1997, and has held her current role of Chief Administrative Officer, Norton Medical Group, since November 2006. Norton Healthcare is a five hospital integrated health system in Louisville, Kentucky, home of the Kentucky Derby. In her role as Chief Administrative Officer, Ginger holds executive responsibility for the strategic direction of the Norton Medical Group division. Norton Medical Group includes over 700 providers in the areas of primary, specialty, and urgent care, at over 123 locations throughout the service area. Norton Healthcare hospitals include 1,837 licensed beds with more than 2,000 physicians serving on the integrated medical staff. The system currently maintains greater than 51% market share in the primary service area. All Norton Healthcare hospitals, outpatient facilities, practices, and urgent care locations utilize the Epic electronic medical records system.
At the time Ms. Figg joined Norton Healthcare, the employed physician group had been part of the system for two years. Under her leadership, the employed physician group – now Norton Medical Group – has grown from 35 physicians to over 700 providers.

Ms. Figg began her career in physician practice management and has held leadership positions with two alternate health systems in Kentucky. She received a bachelor’s degree in Business Administration from the University of Louisville, and a master’s degree in Health Services Management from Webster University in St. Louis, Missouri. Ms. Figg is active in many social and civic organizations including the Brain Injury Association of Louisville, Habitat for Humanity, and is a graduate of Leadership Louisville.

Todd Hightower has nineteen (19) years health care industry experience including providing physician practice management, transaction due diligence, performing financial statement audits, financial analysis, project management, EHR and HIS system implementation and integration, and managing corporate decision-support systems. Specific areas of expertise include physician practice startup, financial due diligence, project plan development and tracking, budget development, preparation of assessments, EMR implementation, and feasibility studies.

As a Senior Manager with Healthcare Strategy Group, Matt Ullum brings nearly a decade of financial and operational experience to the company through his work with PricewaterhouseCoopers, the energy industry and the distilled spirits industry. His past positions with national and global for-profit companies give him a unique perspective on the healthcare industry, allowing him to think outside the box and adopt best practices from other industries to the healthcare setting. His main focus at HSG is on practice acquisition and valuation, strategic planning for employed physician groups, physician compensation plans, interim management/recruiting for key executive positions in physician networks and business development.

Before joining Healthcare Strategy Group, Mr. Ullum received his MBA from the University of Kentucky, where he graduated With Highest Honor. Mr. Ullum also holds an undergraduate degree in accounting from Samford University in Birmingham, Ala., and a Kentucky real estate license. Mr. Ullum is a Certified Public Accountant and a member of the Florida Hospital Association.
Dr. Glenn Loomis serves as President and Chief Executive Officer for St. Elizabeth Physicians. He is also a senior executive for St. Elizabeth Healthcare. He provides executive leadership to more than 300 physicians and over 1,000 employees, oversees growth and development of the physician group and serves as liaison between hospital administration and the employed medical staff. Dr. Loomis is also a member of the St. Elizabeth Executive Council and serves on numerous system level committees. Recently, Dr. Loomis has spearheaded the formation of St. Elizabeth Provider Network, a clinically integrated PHO.

Dr. Loomis joined St. Elizabeth Physicians in September 2010, after serving 12 years in leadership roles at medical groups in Indiana, Michigan and Wisconsin, including Franciscan Alliance, Sparrow Health System and Mercy Health System. He graduated *cum laude* with a bachelor of science in psychology/biology from The Ohio State University in 1988 and earned his Medical Degree from The Ohio State University College of Medicine in 1992. He then fulfilled a family medicine residency at Community Hospitals of Indianapolis in 1995 and was on active duty with the United States Air Force Medical Corps until 1999. He later earned a Master of Science in Healthcare Management from the University of Texas at Dallas in 2007.

During his time with St. Elizabeth Physicians, Dr. Loomis has fulfilled roles in recruitment, orientation and retention of physicians. He has provided leadership for the system’s physician integration strategy, including practice acquisitions, management services organization (MSO) and other physician-hospital services. He has extensive experience in providing physician leadership for electronic health record implementation and managing health system physician operations.

Previously, Dr. Loomis has served as family medicine residency faculty and residency director. He has conducted research and worked to improve residency curriculum. He is a long-time member of the American Academy of Family Physicians and currently a member of the American Medical Association’s Council on Long Range Planning and Development. He is also active in his community, currently sitting on the Data Governance Committee for Healthbridge, a health information exchange. He is extremely active in directing the course of the regions CMMI demonstration project called the Comprehensive Primary Care Initiative.
2:45 – 3:45  

**SESSION A: ICD-10 – MOVING FORWARD: HEATHER GREENE – KRAFT HEALTHCARE CONSULTING, LLC**

Heather Greene, Vice President of compliance services with Kraft Healthcare Consulting, LLC – an affiliate of KraftCPAs PLLC, consults with healthcare providers regarding billing, coding and operations as well as performs coding and documentation reviews. Additionally, she has extensive experience auditing inpatient and outpatient hospital medical records. She also works with attorneys providing expert reports in litigation matters, as well as conducting educational sessions for physicians and other HIM personnel.

With nearly 20 years of experience in the healthcare industry, Heather has extensive experience working in a variety of key healthcare information management roles. Previously, Heather was a coding instructor at MedTech College as well as a HIM manager for LifePoint Hospitals.

Heather is a frequent speaker on healthcare information topics for organizations including HFMA, MGMA, AAPC and ACPEN at both the local and national levels. She also conducts educational training for coders, clinical staff and physicians on ICD-9 and ICD-10 reporting and documentation as well as regulatory compliance.

As a conscientious member of the healthcare community, Heather regularly attends conferences, seminars and takes advantage of many opportunities to interact with other nationally recognized HIM and coding experts where she can stay on top of the ever changing regulations that impact the industry. Additionally, Heather is an active member of Toastmasters, where she maintains her speaking and leadership skills.

**SESSION B: COMBINING FORCES – COMPETITIVE COLLABORATION LEADS TO COST SAVINGS SUCCESS FOR BAPTIST HEALTH & NORTON HEALTHCARE: MIKE REEVES – BAPTIST HEALTH AND GEORGE HERSCH – NORTON HEALTHCARE**

Serving as the System Executive of Supply Chain Services, Mr. Reeves brings over 25 years of experience in Operations, Logistics and Supply Chain Management to Baptist Healthcare System. His expertise lies in the reengineering of supply chain, operations and logistics to improve the operational and financial performance of the hospitals and clinics within the Baptist system.

Prior to joining BHS, Mr. Reeves spent several years with a health care consulting concern where he supported both the supply chain management and information systems implementation practices. He has also worked in the private sector for several Fortune 100 companies including a major paper products producer/distributor, an industry leading medical supply distributor and a publicly recognized food service concern.
Mr. Reeves is a graduate of the Michigan State University College of Business with a Bachelor's Degree in Material and Logistics Management as well as in Transportation/Physical Distribution and Purchasing Management.

George Y. Hersch joined Norton Healthcare in October 2000 as Vice President of materiel management. He has system-wide responsibility for supply chain management including purchasing, distribution, the materiel management information system and technology assessment.

Hersch has more than 30 years of experience in health care. Before joining Norton Healthcare, he was responsible for supply chain operations at UCLA Healthcare, Los Angeles, and at the Franciscan Health System, Philadelphia. In 1998 during his tenure at UCLA, he developed a physician-peer review process to evaluate emerging medical technologies that remains a model program to this day. He replicated the process at Norton Healthcare, legitimizing technology assessment as an important clinical/business process in both the academic medical center and community hospital environment.

Hersch holds a bachelor's degree in journalism from Ohio University and a master's degree in management (health care administration) from Central Michigan University. Hersch is currently serving on the boards of: Central State Hospital; the National Alliance on Mental Illness for Louisville; Alliant Purchasing, LLC; and Wesley Manor.

4:00 – 5:00

KHA UPDATE: STEVE MILLER – KENTUCKY HOSPITAL ASSOCIATION
FRIDAY, OCTOBER 24, 2014

8:00 – 9:15

ESTABLISHING DEFENSIBLE PRICING IN TRANSPARENT TIMES:
JAMIE CLEVERLEY – CLEVERLEY & ASSOCIATES

Mr. Cleverley serves as President for Cleverley & Associates, where he has worked since 2003. Mr. Cleverley consults with hospital and healthcare organizations to identify financial and operating opportunities, as well as related strategies for performance improvement. Prior to joining the firm, he directed a statewide health services program.

Mr. Cleverley has authored a number of publications dealing with healthcare financial analysis and application, including the annual Community Value Index® hospital survey, The State of the Hospital Industry, and The Essentials of Health Care Finance. He is a two-time recipient of the Healthcare Financial Management Association’s Yerger/Seawell Best Article award.

Mr. Cleverley received his Masters in Health Administration from The Ohio State University in 2004. He received his Bachelors of Science in Business Administration from The Ohio State University in 1999.

9:30 – 10:45

SESSION A: PCI COMPLIANCE – BEST PRACTICES IN CARD ACCEPTANCE AND DATA SECURITY: MATTHEW ROZEN – J.P. MORGAN

Matt Rozen, Vice President – J.P. Morgan Healthcare Strategic Strategies, has 11 years of experience in banking, consulting, revenue cycle process improvement and treasury services. He has worked with the largest healthcare provider organizations in the country to build payment processing networks, optimize patient payment processes, increase collection outlets, improve statement redesign, and help drive key financial and operational performance metrics. For J.P. Morgan’s clients, he brings best practices and business process improvement experience from our national client base to all of our healthcare client relationships, and works with our clients to collect and share success stories, best practices and challenges related to government and industry reform.
**SESSION B: CONSUMER DRIVEN HEALTH CARE, HIGH DEDUCTIBLE HEALTH PLANS HISTORY, PRESENT AND FUTURE. IMPACT ON PATIENT RESPONSIBILITY AND FINANCING: JAMES (“JIM”) Gandolfo – PNC HEALTHCARE**

Jim Gandolfo has been the Healthcare lead for PNC’s Treasury Consulting Group (TCG). TCG provides a variety of support to both industry and PNC’s Treasury Management professionals related to comprehensive solutions for commercial payments, receivables and information management.

Currently, Jim is responsible for HSA development and distribution. Previously, he was with PNC Global Investment Servicing, where he was responsible for their Health Savings Account administration solution (HSA). His experience also includes a long tenure with Wilmington Brokerage Services Company, a registered broker-dealer and wholly owned subsidiary of Wilmington Trust Company, where he was president and chief executive officer.

A graduate of Radford University in Radford, Virginia, Gandolfo holds a Bachelor of Science degree in political science and history. His FINRA licenses include Series 6, 7, 24 and 63. He is chairman of the American Bankers Association’s HSA Council and a member of the Board of Directors of the HSA Coalition, promoting and expanding HSAs, nationally. He is based in Wilmington, Delaware.

**10:45 – 12:00**

**MERGERS & ACQUISITIONS: JOHN SHUMATE – VALULOGIK**

John is CEO of ValuLogik, a financial services firm focusing primarily on valuation services for growth-stage technology companies. He has built a career around working closely with technology ventures. He has over a decade of financial experience, including valuation; incubation; M&A; complex modeling; and venture consulting. John attended the Wharton School at the University of Pennsylvania, where he received a B.S. in Economics and dual concentrations in Finance and Management. Prior to ValuLogik, John gained investment expertise as Vice President of Blue Equity, a growth-stage private equity firm. He developed strategic experience as Chief Financial Officer for BellaNovus, an early-stage medical device development company. He gained a wealth of analytical and transactional experience at bCatalyst, a business incubator and early-stage mergers and acquisitions firm. John developed transactional and corporate finance experience at Ethicon-Endo Surgery, a medical device division of Johnson & Johnson. He gained additional equity research knowledge at Hilliard-Lyons, then a division of PNC Financial Services.
EVENT:
Embassy Suites
1801 Newtown Pike
Lexington, KY  40511
(859) 455-5000

Hotel Reservations should be made directly with the Hotel. Be sure to mention HFMA to receive the special discounted rate.

DIRECTIONS:
From I-75/I-64:
Take Exit 115, then turn West onto Newtown Pike. Turn right onto Aristides Blvd at the UK Coldstream Research Campus and the hotel is on the right.

From Martha Layne Collins (Bluegrass) Parkway:
Take a right onto Versailles Road (US 60). Take the 2nd New Circle Road (Route 4) exit. Continue on New Circle Road until you reach Newtown Pike. Take Newtown Pike exit north 9B. Turn left onto Aristides Blvd at the UK Coldstream Research Campus and the hotel is on the right.

From Bluegrass Airport:
Take a left onto Man O War from airport parking area to Versailles Road, turn right (East) onto Versailles, take 2nd New Circle Road (Route 4) exit. Continue on New Circle Road until you reach Newtown Pike. Take Pike exit north 9B. Turn left onto Aristides Blvd at the UK Coldstream Research Campus and the hotel is on the right.

From Downtown:
Take Main Street to Newtown Pike. Turn onto Newtown Pike and go approximately 5 miles. Turn left onto Aristides Blvd at the UK Coldstream Campus and the hotel is on the right.
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REGISTRATION – OCTOBER 23-24, 2014

KY Chapter HFMA Fall Institute
Embassy Suites
1801 Newtown Pike
Lexington, KY 40511
(859)-455-5000

Name ___________________________ Nickname ___________________________
Title ________________________________
Company: ________________________________________________
Address: ________________________________________________
City ____________________________ State ____________ Zip___________
Email _____________________________ Phone ______________ Fax __________
Are you an HFMA member? _____ Member # __________ Chapter Affiliation ___

REGISTRATION FEES:
(Please circle the fee that applies)

Member Registration $150.00
Non-Member Registration $200.00
One day only (Member) $100.00
One day only (Non-member) $150.00
Other:
Student Registration $20.00

Register online at www.hfmaky.org

Please make checks payable to: KY Chapter HFMA

Mail to: Christopher Graff, Treasurer
Kentucky HFMA
7705 Shaker Mill Road
Louisville, KY 40220
Phone: (502) 217-8309
Email: christophergraff@kentuckyonehealth.org