



# Best Practice Forum - 2013 -

May 14-16  
Courtyard Marriott  
San Diego, CA





Hello, and welcome to CentraMed's **Annual Best Practice Forum-2013**. The entire team is delighted that you have joined us here in America's finest city.

At a time when our industry is facing the most significant challenges in the past 30 years, this Forum is a timely opportunity to bring together a rich mix of revenue management and healthcare experts. Together they create an opportunity to learn, discuss and plan the future of healthcare finance and technology. We are confident that by sharing ideas and experiences with your colleagues and our speakers you will gain insights and ideas to support better decisions and sustain the growth and success of your healthcare organizations.

Thank you for joining us— I look forward to time with each of you.

Best Regards,

*Vik Torpunuri*

CEO



Welcome to the Courtyard by Marriott San Diego Downtown. Located in the former San Diego Trust & Savings Bank, this downtown San Diego hotel is a historic, unique space that we trust you will enjoy. The hotel is within walking distance to over 100 shopping and entertainment venues.

For a listing of local restaurants, attractions and a map of the Gaslamp District, please see the front desk staff who handle all concierge services.

For those extending their time in San Diego we hope you'll find time to visit a few of these great places:

- The world-famous San Diego Zoo
- The beautiful Balboa Park and Museums
- Coronado Island – home of the iconic Hotel del Coronado
- The USS Midway Aircraft Carrier
- Seaport Village

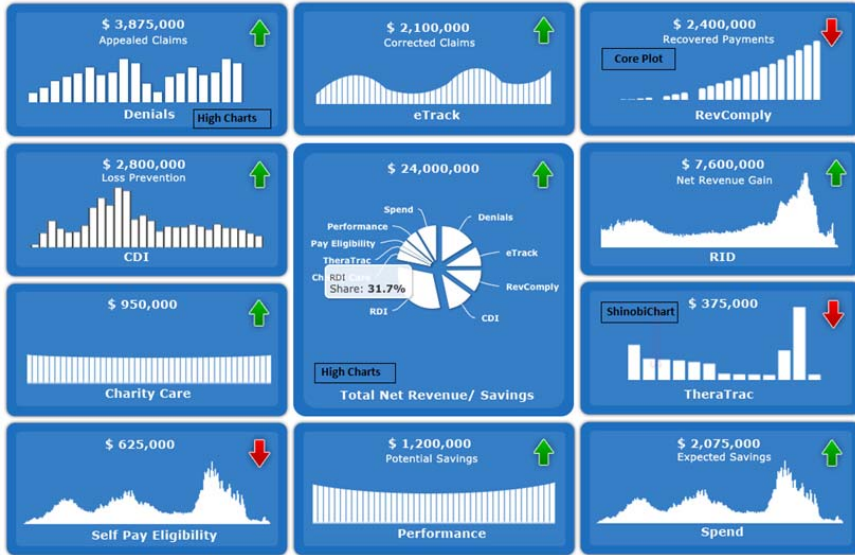


A rare historic neighborhood located in the midst of a burgeoning downtown, the Gaslamp Quarter is comprised of 16 ½ city blocks functioning as San Diego's premier destination for shopping, dining and entertainment. Located steps from the San Diego Convention Center, San Diego Padres Ballpark, Horton Plaza and Seaport Village, the Gaslamp Quarter includes 94 Victorian Era buildings constructed as early as 1880, and is listed on the National Register of Historic Places.

"The Gaslamp" as it is referred to locally, offers sightseeing, nightlife, dining, shopping, accommodations and entertainment, and surrounds visitors with the sights, sounds and experiences of an historic business district in an exciting urban environment.



See the demos of all CentraMed's new technology at the **Wednesday Tech Showcase & Cocktail Hour**



## CONFERENCE AGENDA

### TUESDAY, MAY 14

TIME	ROOM	EVENT
4:00 – 5:00	Safe Deposit Foyer	Registration
5:00 – 6:00	Safe Deposit Foyer	Welcome Cocktail Reception

The Welcome Cocktail Reception is the only planned event this evening. We want to give you the opportunity to check out downtown San Diego, or enjoy a relaxing evening here at the Courtyard. Enjoy drinks at the bar, a game of pool, dinner in the restaurant or a good workout in the gym. We look forward to a great week!

**See you in the morning — Breakfast is at 7:30am**



WEDNESDAY, MAY 15

TIME	ROOM	EVENT
7:30 – 8:30	Vault	Breakfast
8:30 – 8:45	Sefton	Greeting and Opening Remarks Vik Torpunuri, CEO & Jack Duffy, EVP – <b>CentraMed</b>
8:45 – 10:30	Sefton	Guest Speaker Day Egusquiza, President – <b>AR SYSTEMS, INC</b> <i>“ICD 10 Changes Everything in the Revenue Cycle”</i>
10:30 – 10:45		Bio Break
10:45 – 11:30	Sefton	Guest Speaker Eric Young, CFO – <b>Memorial Health Systems</b> <i>“Challenges of Scaling Physician Practices to Match with Hospital Services...a CFO’s Perspective ”</i>
11:45 – Noon	Sefton	Client PI Presentation – <b>Archbold Medical Center</b> Lynn Johnson, Director, Revenue Integrity <i>“Managed Care - Balancing Acts”</i>
Noon – 1:00	Vault	Lunch
1:00 – 1:15	Sefton	Client PI Presentation – <b>Floyd Medical Center</b> Chris Butler, Manager of Central Scheduling <i>“Central Referral Project”</i>
1:15 – 2:30	Sefton	Guest Speaker Lea Fowler, Director, ERISA Claims Recovery – <b>ERISA Recovery Solutions</b> <i>“ERISA: Finding the Hidden Gold in Your Revenue Cycle”</i>
2:30 – 2:45		Bio Break / Afternoon Snack



Cont. - WEDNESDAY, MAY 15

TIME	ROOM	EVENT
2:45 – 3:30	Sefton	Guest Speaker Paul Belton, VP Corporate Compliance – <b>Sharp HealthCare</b> “Devil in the Details”
3:45 – 4:00	Sefton	CentraMed Tech Showcase Introduction Vik Torpunuri, CEO – <b>CentraMed</b> Tripp Winn, Sr. Vice President – <b>Patient Secure</b>
4:00 – 5:00	Safe Deposit Foyer	Tech Showcase and Cocktail Hour
6:00 – 7:00	Vault	Dinner



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**CentraMed Tech Showcase and Cocktail Hour**  
Highlighting Our New Cloud-Based Solutions...



⇒ **Education Portal**

Revenue Management Education & Training - new platform

⇒ **RM Analytics**

Imports patient relevant data, examines active accounts and supports audits of claims

⇒ **RM Metrics**

Managed care, charge audit, clinical coding and documentation

⇒ **eTrac**

Processes failed claim and claim edit data of live A/R

**THURSDAY, MAY 16**

<b>TIME</b>	<b>ROOM</b>	<b>EVENT</b>
7:30 – 8:30	Vault	Breakfast
8:30 – 8:45	Sefton	Good Morning! Jack Duffy, EVP – <b>CentraMed</b>
8:45 – 9:45	Sefton	Guest Speaker Greg Polley, Vice President – <b>Floyd Medical Center</b> <i>“Maximizing Downstream Revenue by Leveraging Your Primary Care Network”</i>
9:45 – 10:00	Sefton	Client PI Presentation – <b>St. Joseph’s Medical Center</b> Sharia Stabler, Charge Auditor <i>“Missed Charges”</i>
10:00 – 10:15		Bio Break / Afternoon Snack
10:15 – 11:45	Sefton	Guest Speaker Christine Reilly, Ph.D., RN, <b>Clinical Psychologist</b> <i>“Tools of the Trade: How to use Cognitive Behavioral Therapy in the Revenue Cycle”</i>
Noon – 1:00	Vault	Lunch
1:00 – 1:15	Sefton	Client PI Presentation – <b>Lafayette General Medical Center</b> Wendy Reaux, RMD Supervisor <i>“Impact of Pricing Quantity Conversion Factors”</i>
1:15 – 2:45	Sefton	Guest Speaker Stefani Daniels, RN, MSNA, CMAC, ACM – Founder, President and Managing Partner – <b>Phoenix Medical Management</b> <i>“Third Generation Hospital Case Management”</i>
2:45 – 3:00		Bio Break / Afternoon snack



**Cont. - THURSDAY, MAY 16**

<b>TIME</b>	<b>ROOM</b>	<b>EVENT</b>
3:00 – 4:00	Sefton	Guest Speaker Eric Mueller, Chief Healthcare Solutions and Product Strategist, Health and Life Sciences Industry Technology Unit – <b>Microsoft</b> <i>“Patient Journey”</i>
4:00 – 4:30	Sefton	Acknowledgements and Closing Remarks Vik Torpunuri and Jack Duffy
6:00	Hotel Lobby	Meet up for hosted dinners out on the town

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**FORUM SPEAKER BIOS - Listed Alphabetically**

**PAUL BELTON**

*Vice President of Corporate Compliance, Sharp HealthCare*



Paul has served as a hospital administrator for the past twenty-three years at a number of hospitals across the country. His main responsibility has included positions as Vice President of Ancillary Services and Assistant Vice President of Finance. He has a Master’s in Hospital Administration and a Master’s in Business Administration from Arizona State University. He also attended law school and has a Master’s in Health Law from Loyola University-Chicago School of Law.

After working with the American Hospital Association, Stanford University, and PricewaterhouseCoopers specializing in implementing corporate compliance programs, Paul has served the past twelve years as Vice President of Corporate Compliance and Research with Sharp HealthCare in San Diego, CA. He is an active member of the Health Care Compliance Association, American College of Healthcare Executives, Healthcare Financial Management Association and the American Health Lawyers Association.



## FORUM SPEAKER BIOS - *Listed Alphabetically*

### **STEFANI DANIELS**

*Founder, President and Managing Partner, Phoenix Medical Management*



Stefani Daniels, RN, MSNA, CMAC, ACM is the founder, President and managing partner of Phoenix Medical Management, Inc. She is a former hospital executive, chief nursing officer and senior consultant with Johnson & Johnson. Stefani held faculty appointments at University of Pennsylvania, Nova Southeastern University in the Graduate Division of the School of Business and Entrepreneurship and Columbia University in New York. She serves on the editorial board of Lippincott's Professional Case Management journal, HCPro's Case Management Monthly, and is a popular speaker at national and regional conferences. Stefani is a contributing author to the 2nd edition of CMSA's Core Curriculum and is the co-author of the text *The Leaders Guide to Hospital Case Management*.

### **DAY EGUSQUIZA**

*President, AR SYSTEMS, INC.*



Day Egusquiza brings over 30 years experience in health care reimbursement, hospital business office operations, contracting and compliance implementation. Additionally, her experience includes eight years as a Director of a Physician Medical Management billing service and most recently completed an integrated business office between a hospital and a large physician clinic. She has been an entrepreneur in hospital and physician practice accounts receivable management and a leader in redesigning numerous organizations. Her work includes providing guidance as a compliance & reimbursement educator while providing operational insight on the revenue cycle impacts of RAC/Medicare Recovery Audit Contractors. Additionally, she has been instrumental in researching and preparing national education on the impact of the Prescription Drug Benefit. ICD 10 is also on the list of 'fun' projects with audit and boot camps. Day's strength is her ability to 'operationalize' complex regulations into teachable components.

### ***Day Egusquiza, cont.***

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

Her greatest accomplishments are her four wonderful children and her eight fabulous grandchildren.

### **LEA FOWLER**

*Director of ERISA Claims Recovery, ERISA Revenue Solutions (ERS)*



Lea Fowler is an expert in ERISA appeal recovery methods. She has over five years experience in the field with a proven track record of recovery for her clients. Lea graduated summa cum laude from DeVry University in 2009. She co-founded her current company ERISA Revenue Solutions with her business partner Larry Jones. The office is located in Beloit, Wisconsin. Lea's article *ERISA, The Secret Weapon to Recover Provider Revenues* was published on March 23, 2011 on the American Conference Institute website and has been asked to write an article on ERISA for *Outpatient Surgery Magazine*.

She has two children. A son Jarred who is a sonar tech in the United States Navy and a daughter Jasmine who is a senior at Harlem High School.

## FORUM SPEAKER BIOS - Listed Alphabetically

### ERIC MUELLER

Chief Healthcare Solutions and Product Strategist  
Health and Life Sciences Industry Technology Unit, Microsoft



Eric Mueller is Chief Healthcare Solutions and Product Strategist at Microsoft. Mr. Mueller's 20 years of diversified experience spans the gamut of Healthcare Strategic planning and execution with a diversified background that includes provider, payer and life sciences thought leadership. His cross-functional expertise in envisioning and leading revenue and growth initiatives, grounded solidly on business and economic value, have earned him a name in the health-care industry.

Prior to joining Microsoft, Mr. Mueller was President of WPC Services, a healthcare consulting organization and exclusive publisher of HIPAA implementation standards. During his tenor, WPC was awarded Microsoft's Healthcare partner of the year. Prior to WPC, Mr. Mueller served as SVP of AIM Healthcare, an Optum/United Healthcare Company, in which he was responsible for the day to day operations. Mr. Mueller has also held executive positions at several healthcare companies across the country. As a champion of Healthcare reform, Mr. Mueller plays a key role in various special interest groups and is a frequent speaker at industry events across the country. Mr. Mueller is also a prolific writer and is considered a healthcare industry expert on healthcare policy and technology. He is the author of such publications as "Data is the Key to Population Health Management", "Business Intelligence Improves Bottom Line" and "Balancing Innovations, Business Needs, and Security".

### GREG POLLEY

*Vice President, Floyd Medical Center*



Floyd Medical Center Vice President for Managed Care and Network Services – Gregory D. Polley, CPA (59) joined the Floyd staff in 1996. Mr. Polley graduated in 1977 from Baylor University with a Bachelor of Business Administration Degree in Accounting. Prior to joining the Floyd family, Mr. Polley

**ERIC YOUNG**

*Vice President and CFO, Memorial Health Systems*



Eric L. Young, MBA, CPA, FHFMA, Chief Financial Officer. Mr. Young joined the Corporation as Chief Financial Officer in October 2011. His responsibilities include accounting and finance, revenue cycle and materials management. Prior to coming to the Corporation, he spent five years as the CFO for Harnett Health System, in Dunn, North Carolina (2007-2011); six years as the CFO for Madison County Hospital, in London, Ohio (2000-2007); four years as a Manager, Ernst & Young, Columbus, Ohio (1997-2000); five years as Director of Accounting, Grady Memorial Hospital, Delaware, Ohio (1992-1997); and three years as Accountant, Madison County Hospital, London, Ohio (1989-1992).

Mr. Young received his Bachelor of Science in Business Administration and Accounting at Urbana University, Urbana, Ohio in 1985. He received his Masters in Business Administration from Capital University, Bexley, Ohio in 1996. He is a Fellow in the Healthcare Financial Management Association and has actively served on boards of healthcare organizations/civic organizations.

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**THANKS FOR JOINING US THIS YEAR!**



In an effort to “save a tree” as well as your back, we opted not to print the large binder for you to tote around this year. The complimentary CentraMed flash drives are loaded with the speaker presentations from those speakers who gave consent to distribute. The client Process Improvement presentations will be available on the CentraMed website in the Client-only Best Practice section.

Thank you so much for joining us this year. We want you to know that we value your feedback and if you have comments or suggestions for future Best Practice Forums, please feel free to email Vik directly at [vtorpunuri@centramed.co](mailto:vtorpunuri@centramed.co).

**Greg Polley, cont.**

was the Chief Financial Officer of the Kelsey-Seybold Clinic in Houston, Texas from 1982-1990. From 1990-1996, he was the Chief Financial Officer of Harbin Clinic in Rome, Georgia. In November 1996 Mr. Polley was named Chief Operating Officer of the Floyd Primary Care Network (formerly known as Centrex Primary Care) and Director of Managed Care for Primary Care and Floyd Medical Center. Mr. Polley has been Vice President since 1999 and currently oversees Floyd Primary Care Network, Family Practice Business Processes, Emergency Physicians, Neonatology Physicians, Rehabilitation Services, Revenue Management, Medical Office Buildings, Hyperbarics/Wound Clinic, and Heyman HospiceCare. He is presently a member of the Georgia Association of Healthcare Executives, Healthcare Roundtable for Managed Care Executives, Georgia Hospital Association, Georgia Society of CPAs and the Medical Group Management Association.

**CHRISTINE REILLY**

*Clinical Psychologist*



Christine Reilly, Ph.D., RN, is a leading authority on cognitive therapy. She has lectured extensively to a broad array of professionals both nationally and internationally on the advanced practice of cognitive therapy. Her publications and research interests revolve around the training of professionals in the techniques of cognitive therapy and using them in clinical practice.

In addition, Dr. Reilly has over a decade's experience helping people overcome obstacles that prevent them from reaching their full potential and enjoying life. Dr. Reilly is a Founding Fellow in the Academy of Cognitive Therapy, and a member of AABT, APA, ANA and ISPN.

She also has over fourteen years of experience as Associate Professor in the University of Delaware College of Health and Nursing Sciences in the Department of Nursing with a joint appointment in the Department of Psychology.

Her family includes her husband, Kurt, three children. Her home is in Chester County, Pennsylvania.

*Speaker bios cont. on next page*



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