

THE FOURTH NATIONAL

Physician Advisor & UR Team Boot Camp

GETTING IT RIGHT THE FIRST TIME



Onsite:

July 20 – 22, 2016
San Antonio, TX

Hyatt Regency San Antonio Riverwalk

Webcast: In your own office or home live via the Internet with 24/7 access for six months

Co-Produced by the National RAC Summit and



BOOT CAMP TOPICS — Four Key Areas for Success:

- I. The First Point of Contact
- II. Concurrent and Daily Review
- III. Denial Prevention
- IV. Ongoing Education



www.RACSummit.com

CONTINUING EDUCATION CREDITS:

Continuing education credit will be available for physicians, nurses, compliance professionals, CPAs, case managers, and coders. See page 2 of the brochure for details.



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AR Systems, Inc.



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Advisor, Self Regional Healthcare



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Clinical Appeals & Denials
Coordinator, Infirmiry Health



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CHC, CI-CDI, CPEHR, CPHIT,
Founder, CEO & Executive Physician
Educator, DocuComp®LLC



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Associate Professor of Medicine,
Physician Advisor, Billing Compliance,
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ACM, Manager of Utilization
and Appeals, CaroMont Regional
Medical Center; Adjunct Graduate
Faculty, Blair School of Health,
Queens University of Charlotte



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CHCQM, Vice President, Accretive
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Physician Advisor and Medical
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Senior Vice President/Chief
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and Hospital Systems



Michael A. Salvatore, MD,
FACP, CHCQM, Physician Advisor,
Beebe Medical Center



K. Cheyenne Santiago, RN,
Medical Review Clinical Manager,
WPS GHA Medicare



Bob Soltis, Author, How to
Handle Your Medicare Hearing;
Former ALJ, Office of Medicare
Hearings and Appeals (OMHA)



Howard Stein, DO, MHA,
CHCQM, Physician Advisor and
Associate Director of Medical
Affairs, CentraState Medical Center



John Zelem, Vice President,
Compliance and Physician
Education (ACE), Executive Health
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ADDITIONAL GRANTOR: Ronald Hirsch, MD, FACP, CHCQM

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CONTINUING EDUCATION CREDITS

The Fourth National Physician Advisor - Utilization Review Team Boot Camp will be providing continuing education credit for a variety of hospital professionals. Check this page and the website for updates as approvals are granted.

PHYSICIANS:

Accreditation Statement - This activity has been planned and implemented in accordance with the accreditation requirements and policies of the Accreditation Council for Continuing Medical Education (ACCME) through the joint providership of Amedco and the Health Care Conference Administrators (HCCA). Amedco is accredited by the ACCME to provide continuing medical education for physicians.

Credit Designation Statement - Amedco designates this live activity for a maximum of 16.25 *AMA PRA Category 1 Credits*[™]. Physicians should claim only the credit commensurate with the extent of their participation in the activity.

NURSES:

Amedco is accredited as a provider of continuing nursing education by the American Nurses Credentialing Center's Commission on Accreditation.

This course is co-provided by Amedco and HCCA. Maximum of 16.25 contact hours.

SATISFACTORY COMPLETION:

Participants must complete an attendance/evaluation form in order to receive a certificate of completion/attendance. Your chosen sessions must be attended in their entirety. Partial credit of individual sessions is not available.

PHYSICIAN ADVISOR AND HCQM CREDIT FROM ABQAURP:

The conference is approved by the American Board of Quality Assurance and Utilization Review Physicians (ABQAURP) to provide up to 16.5 continuing education hours to apply towards Health Care Quality and Management (HCQM) Certification and Physician Advisor Sub-Specialty credit.

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The conference will seek approval for CCB Credits by the Compliance Certification Board (CCB). The conference will issue a certificate of credit and congratulations letter with instructions for filing the CCB certificate for credit.

CERTIFIED CASE MANAGERS (CCM[®]):

The conference will seek approval from the Commission for Case Manager Certification to provide up to 16.5 continuing education clock hours to CCM[®] board certified case managers. For onsite attendees, the total number of clock hours attended for the general sessions will be entered by the Registrar at the completion of the program, and the certificate will reflect the actual number of clock hours completed by the participant. For webcast attendees, a certificate will be provided that permits self-certification of the number of clock hours watched, together with an evaluation form that must be completed and returned.

CODERS:

The conference has been approved by AAPC for up to 16.5 continuing education hours, depending upon session attendance. Certificates will be issued onsite. Online attendees must enroll in, complete, and successfully pass the final examination for the RAC Certificate Program for this conference in order to earn their CEUs. Granting of prior approval in no way constitutes endorsement by AAPC of the program content or the program sponsor.

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OTHER ATTENDEES:

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WEDNESDAY, JULY 20, 2016

All sessions, including preconference, are held in REGENCY EAST.

PRECONFERENCE: The Power of Clinical Documentation Improvement/CDI with Physician Advisor Leadership — to Tell an Enhanced Patient Story

(Registration optional — required for the RAC Certificate program)

1:00 pm Exploring an Integrated Clinical Documentation Improvement (CDI) & Education Program

Learning Objective: Learn how to maximize the traditional CDI/coding and the UR/Pt status into one cross-trained point of education.

Day Egusquiza, President, AR Systems, Inc., Twin Falls, ID

1:30 pm CDI 2.0 Beyond Coding: This is Not Your Parent's CDI

Learning Objectives:

- 1) Learn ways to structure the CDI program to maximize impact.
- 2) Understand how the CDI program improves hospital-physician relationships to improve documentation and quality.

Elizabeth Lamkin, MHA, ACHE, CEO/Partner, PACE Healthcare Consulting, LLC, Bluffton, SC

2:00 pm Clinical Documentation and the Physician Advisor: Being Sure the Medical Words are Clinically Significant — Words DO Matter when Justifying Inpatient Status

Learning Objectives:

- 1) Communicate the role of explicit medical record documentation and its direct relationship to MS-DRG assignment.
- 2) Discuss how explicit 'clinical judgement' documentation more accurately defines inpatient care that is "reasonable and necessary" to justify utilization of resources/intensity of services.

Betty B. Bibbins, MD, BSN, CHC, CI-CDI, CPEHR, CPHIT, Founder, CEO & Executive Physician Educator, DocuComp® LLC, Cape Charles, VA

2:25 pm Break in Exhibit Hall REGENCY WEST

2:45 pm Rescuing the Electronic Medical Record: Where is the Beef in your Progress Note?

Learning Objectives:

- 1) The APSO note: learn how to use the right format to make the note readable.
- 2) Learn how to avoid words that hurt your case and how to use the right language to make it meaningful.

Michael Salvatore, MD, FACP, CHCQM, Physician Advisor, Beebe Medical Center, Lewes, DE

3:15 pm Turning a Denial into an Improved Patient Story

Learning Objectives:

- 1) Understand case studies of successful appeals.
- 2) Gain realistic advice on navigating Commercial, Medicare, and Medicare Advantage denials.

Kim Frazier, DNP, MSN, RN, ACM, Manager of Utilization and Appeals, CaroMont Regional Medical Center, Gastonia, NC; Adjunct Graduate Faculty, Blair School of Health, Queens University of Charlotte

3:45 pm Leveraging a PA with CDI to Tell a Story of Acuity

Learning Objectives:

- 1) Understand the PA role with regard to coding accuracy.
- 2) Learn how to ensure acuity is properly documented.

John Zelem, Vice President, Compliance and Physician Education (ACE), Executive Health Resources, an Optum Company, Newtown Square, PA

4:15 pm Q&A with Faculty

Day Egusquiza, President, AR Systems, Inc., Twin Falls, ID (Moderator)

5:00 pm Preconference Adjournment

5:00 pm Networking Reception in Exhibit Hall REGENCY WEST

THURSDAY, JULY 21, 2016

7:00 am Registration Open REGENCY FOYER

7:00 am Breakfast in Exhibit Hall REGENCY WEST

All sessions are held in REGENCY EAST.

8:00 am Welcome and Introduction Audience Response System Poll



Day Egusquiza, President, AR Systems, Inc., Twin Falls, ID (Chair)

8:10 am Regulations, Readmission Penalties, RADV — "He Who Has the Gold Makes the Rules."

Learning Objectives:

- 1) Learn about updates regarding recent Medicare regulations and guidance.
- 2) Understand the changes to the CMS readmission reduction program.



Ronald Hirsch, MD, FACP, CHCQM, Vice President, Accretive Physician Advisory Services (AccretivePAS), Chicago, IL

8:40 am Finding the Lost Inpatients with the 2 MN Rule, Plus Other Observation Confusion

Learning Objectives:

- 1) Clarify the two types of inpatient.
- 2) Find lost inpatients with risk.



Day Egusquiza, President, AR Systems, Inc., Twin Falls, ID

9:15 am The Evolving Role of the Physician Advisor as a Member of the Leadership Team

Learning Objectives:

- 1) List five major areas of influence of the modern day Physician Advisor.
- 2) List three main categories of a Physician Advisor's role within an organization.

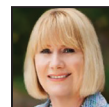


Ronald J. Rejzer, MD, CHCQM-PHYADV, Senior Vice President and Chief Physician Advisor, Parkland Health & Hospital System, Dallas, TX

9:45 am Effective C-suite and Physician Advisor Collaboration — Get to Common Goals through Shared Knowledge and Collaborative Approaches

Learning Objectives:

- 1) Understand roles and challenges between C-Suite and PA.
- 2) Learn ways for C-suite and PAs to manage as a team towards goal achievement.



Elizabeth Lamkin, MHA, ACHE, CEO/Partner, PACE Healthcare Consulting, LLC, Bluffton, SC



Michael Salvatore, MD, FACP, CHCQM, Physician Advisor, Beebe Medical Center, Lewes, DE

10:15 am Break in Exhibit Hall REGENCY WEST

10:45 am UR: 1st Point of Contact — ER and Direct Admit Bad Habits with Surgery

Learning Objectives:

- 1) Identify the strength of 1st point of contact — avoiding the place and chase bad habit.
- 2) Learn the power of the connection between UR and PAs.



Day Egusquiza, *President, AR Systems, Inc., Twin Falls, ID*

11:15 am Daily Rounding — PA

Learning Objectives:

- 1) Learn the economic, quality, and utilization benefits of well-organized, interdisciplinary rounds.
- 2) Understand how the Physician Advisor role in interdisciplinary rounds leads to a decline in denials and permits more effective appeals.



Michael Salvatore, MD, FACP, CHCQM, *Physician Advisor, Beebe Medical Center, Lewes, DE*



Howard Stein, DO, MHA, CHCQM, *Physician Advisor and Associate Director of Medical Affairs, Centrastate Medical Center, Freehold, NJ*

11:45 am Daily Work Flow — PA

Learning Objectives:

- 1) Learn how to impact length of stay.
- 2) Learn how to educate staff and prevent denials.



Jeannine Z. Engel, MD, FACP, *Associate Professor of Medicine, Physician Advisor, Billing Compliance, University of Utah Health Sciences, Salt Lake City, UT*



Maria Johar, MD, *System Physician Advisor and Medical Director, Promedica Health Network, Promedica Health System, Toledo, OH*

12:15 pm Faculty Panel and Q&A

All Morning Faculty

Day Egusquiza, *President, AR Systems, Inc., Twin Falls, ID (Moderator)*

12:35 pm Lunch and Case Study Groups in Exhibit Hall — Finding Your Lost Inpatients: Luncheon Work Session with Faculty **REGENCY WEST**

1:35 pm Present the Case Studies

Table Leaders

Day Egusquiza, *President, AR Systems, Inc., Twin Falls, ID (Moderator)*

2:20 pm What is Going on with the Payers? Traditional Medicare, Part C Medicare, and Managed Care Commercial

Learning Objective:

Understand the current landscape regarding payer activity.



Day Egusquiza, *President, AR Systems, Inc., Twin Falls, ID*

2:30 pm The MAC Landscape: Current Audits and Understanding the MAC's Role in Appeals

Learning Objectives:

- 1) Understand the MACs' role in inpatient reviews.
- 2) Understand the initial levels of Medicare Appeals.



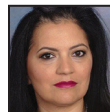
K. Cheyenne Santiago, RN, *Clinical Manager — Medical Review, WPS GHA, Omaha, NE*

3:30 pm Break in Exhibit Hall REGENCY WEST

3:50 pm Bundled Payments: Living with the Comprehensive Joint Replacement (CJR) Initiative

Learning Objectives:

- 1) Learn how to manage the 90-day timeframe.
- 2) Understand the keys to educating providers.



Maria Johar, MD, *System Physician Advisor and Medical Director, Promedica Health Network, Promedica Health System, Toledo, OH*

4:10 pm Medicare Dis-Advantage and Mis-Managed Medicaid — Profits over Patients

Learning Objectives:

- 1) Correlate Medicare and Medicare Advantage regulations.
- 2) Understand common commercial insurer denial tactics.



Ronald Hirsch, MD, FACP, CHCQM, *Vice President, Accretive Physician Advisory Services (AccretivePAS), Chicago, IL*

4:30 pm Payer Contracting — Get it Right Through a Team Approach

Learning Objectives:

- 1) Learn how to bring the clinical and financial silos together to work as a team.
- 2) Understand the power of monitoring and reporting contract activity to improve contract compliance and negotiations.



Elizabeth Lamkin, MHA, ACHE, *CEO/Partner, PACE Healthcare Consulting, LLC, Bluffton, SC*

5:00 pm Panel for Q&A

All Afternoon Faculty

Day Egusquiza, *President, AR Systems, Inc., Twin Falls, ID (Moderator)*

5:30 pm Adjourn

Meet at 6:15 pm

No Host/Dutch Dinner (*Restaurants will be identified prior*)

COMPLIMENTARY WIFI IS AVAILABLE:

Network Name: **Boot Camp**

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We gratefully acknowledge the following for their generous support in helping to make this conference possible.

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Those of us in the Davis Wright Tremaine health care practice group devote nearly all of our time to industry-specific matters. This allows us to develop niche practices within the field that serve needs unique to the health care market. We also understand the business issues and regulatory developments that affect health care delivery and compliance, and as a unified team we can match the attorney with the niche expertise that best addresses client needs. For more information visit our website at www.DWT.com.



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ADDITIONAL GRANTOR: Ronald Hirsch, MD, FACP, CHCQM is Vice President of Regulations and Education for Accretive Health. Visit his web site at www.RonaldHirsch.com. Dr. Hirsch encourages all physician advisors to join the American College of Physician Advisors at www.acpadvisors.org.

EXHIBITORS:

AEROLIB HEALTHCARE SOLUTIONS is a Patient Centered Total Quality Management Consulting firm providing Physician Advisor Gap coverage and education to Physicians, Physician Advisors, Case Managers and Utilization review staff via the Aerolib Learning Management System. The firm emphasizes the importance of documentation in the patient record by all participants in the process: triage, emergency room, attending physician, consultants and nursing staff. We specialize in running a current needs analysis of the organization and based on current regulations, help the Case Management and Utilization Review departments with formulating defensible statement letters that look at the patient globally. For more information visit www.Aerolib.com.

At **APPEAL ACADEMY**, we think it has never been easier to get proper reimbursement and keep those reimbursements. It's a simple matter, really, when one cuts through all the smoke. Cutting through the smoke is the hard part. If the barrage of regulations and legalese has left you more confused than empowered, then stop what you're doing and relax. Because we're about to take aim at all this confusion, blow away the smoke, and make things as simple as possible. Sign up for our free webinars to learn more. For more information please visit www.appealacademy.com.

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PHYSICIAN ADVISOR ON-CALL (PAOC) utilizes its advanced, proprietary Healthcare Information Technology platform to establish connectivity with client Hospitals to exchange HIPPA compliant data allowing them to provide state-of-the-art, seamless, remote Physician Advisor services. PAOC's workflow technology allows our experienced Physician Advisors to deliver the full scope of Physician Advisor Services. The entire Hospital clinical team has direct access to our PAs. PAOC is available days, evenings, nights, weekends and holidays to fill coverage gaps and needs in your PA staffing model.

PAOC services include Level of Care Determinations, concurrent Continuation of stay review, Medical Necessity and regulatory (2 MN rule) compliance guidance and Medical Staff education. Our proprietary workflow and reporting technology allows for robust inventory and performance reporting.

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FRIDAY, JULY 22, 2016

7:00 am Registration Open

REGENCY FOYER

7:00 am Breakfast in Exhibit Hall

REGENCY WEST

Optional Networking Breakfast Table Discussions

Host: Betty B. Bibbins, MD, BSN, CHC, CI-CDI, CPEHR, CPHIT
Key terms to assist PAs in spotting documentation within the medical record that demonstrates severity of illness or the need for greater intensity of care

Host: Elizabeth Lamkin, MHA, ACHE
The power of the Utilization Management Committee (UMC)
• Learn how to run an effective UMC
• Understand how to leverage the power of the UMC

Host: Jeannine Z. Engel, MD, FACP
Writing effective appeals

Host: Ronald Hirsch, MD, FACP, CHCQM
Add some PEPPER to your breakfast—interpreting your hospital's report

Host: R. Phillip Baker, MD
Interaction with Case Management — vital to success

Host: K. Cheyenne Santiago, RN
A roundtable breakfast with WPS GHA

Host: Michael Salvatore, MD, FACP, CHCQM
LOS strategies

Host: Maria Johar, MD
Review of a specific case study

Host: John Zelem, MD
What are the Hazards of Copy and Pasting?

All sessions are held in REGENCY EAST.

CLOSING PLENARY SESSION: Denial Prevention through Managed Care Payer Challenges with Lessons Learned

8:00 am Welcome and Overview



Audience Response System Polling
Day Egusquiza, President, AR Systems, Inc., Twin Falls, ID (Chair)

8:15 am Specific Denial Cases, Provider Involvement, and Plan of Attack — Aetna, Humana, and United (Commercial Managed Care and Medicare Advantage) and MAC (Noridian) Pre-pay Probe Denials
Jennifer L. Bartlett, CPAR, Clinical Appeals & Denials Coordinator, Infirmiry Health, Mobile, AL



Jeannine Z. Engel, MD, FACP, Associate Professor of Medicine, Physician Advisor, Billing Compliance, University of Utah Health Sciences, Salt Lake City, UT



Michael Salvatore, MD, FACP, CHCQM, Physician Advisor, Beebe Medical Center, Lewes, DE



Howard Stein, DO, MHA, CHCQM, Physician Advisor and Associate Director of Medical Affairs, Centrastate Medical Center, Freehold, NJ

9:00 am The New Art of War, Medicare Advantage Plans

Learning Objectives:
1) Learn how to decrease denials from the Medicare Advantage Plans and who to contact.
2) Learn what types of complaints to forward to CMS to get results.



R. Phillip Baker, MD, Physician Advisor for Clinical Excellence, Self Regional Healthcare, Greenwood, SC



9:30 am How to Do and When to Do Peer to Peer with the Payers

Learning Objectives:
1) Learn when to use peer to peer and when not.
2) Learn successful techniques for managing peer to peer, win or lose.



Jeannine Z. Engel, MD, FACP, Associate Professor of Medicine, Physician Advisor, Billing Compliance, University of Utah Health Sciences, Salt Lake City, UT



Maria Johar, MD, System Physician Advisor and Medical Director, Promedica Health Network, Promedica Health System, Toledo, OH



Ronald J. Rejzer, MD, CHCQM-PHYADV, Senior Vice President and Chief Physician Advisor, Parkland Health & Hospital System, Dallas, TX



Michael Salvatore, MD, FACP, CHCQM, Physician Advisor, Beebe Medical Center, Lewes, DE

9:55 am Faculty Panel with Q&A

Day Egusquiza, President, AR Systems, Inc., Twin Falls, ID (Moderator)

10:10 am Prize Drawing/Break in Exhibit Hall REGENCY WEST

10:30 am Building an Internal Appeal Process with your Physician Advisor

Learning Objectives:
1) Gain practical advice on developing an internal appeal program in conjunction with PAs.
2) Learn how to achieve organizational cost savings by hiring nurse appeal writers to successfully defend denials.



Kim Frazier, DNP, MSN, RN, ACM, Manager of Utilization and Appeals, CaroMont Regional Medical Center, Gastonia, NC; Adjunct Graduate Faculty, Blair School of Health, Queens University of Charlotte



11:00 am ALJ Mock Hearing

- Internal preparatory work – UR
- Internal preparatory work – PA
- Internal preparatory work – legal
- Presentation to the ALJ
- The ALJ decision
- De-briefing — Do's and Don'ts



Jennifer L. Bartlett, CPAR, Clinical Appeals & Denials Coordinator, Infirmiry Health, Mobile, AL



Jeannine Z. Engel, MD, FACP, Associate Professor of Medicine, Physician Advisor, Billing Compliance, University of Utah Health Sciences, Salt Lake City, UT



Jessica L. Gustafson, Esq., Founding Shareholder, The Health Law Partners, Southfield, MI



Maria Johar, MD, System Physician Advisor and Medical Director, Promedica Health Network, Promedica Health System, Toledo, OH



Abby Pendleton, Esq., Founding Shareholder, The Health Law Partners, Southfield, MI



Bob Soltis, Author, How to Handle Your Medicare Hearing; Former ALJ, Office of Medicare Hearings and Appeals (OMHA), Cleveland, OH



Ernie de los Santos, Founder & Faculty Chair, Appeal Academy, San Antonio, TX (Facilitator)

12:00 pm Panel with Q&A

Day Egusquiza, President, AR Systems, Inc., Twin Falls, ID (Moderator)

12:30 pm Final Wrap-Up

Announcing a New Service Offered by

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PHYSICIAN ADVISOR TRAINING PROGRAMS — TWO UNIQUE OPTIONS!

AR Systems, Inc. is excited to present these dynamic programs to propel the current Physician Advisor from an unclear, self-taught role to an energized leader with enhanced understanding of the daily PA role, payer challenges, appeals, and ongoing provider education while networking with key hospital staff.

TWO DAYS IN THE LIFE OF A PA — INDIVIDUALIZED TRAINING & SHADOWING

A Two (2) Day Onsite Training program moving from theory to practicum with an experienced PA

Two options: 1) PA travels to the training Physician Advisor's hospital. Buddy-training program in a like-sized hospital with ARS and Senior PA.

2) ARS and Senior PA travel to the requested site.

Both ARS/operations and PA Senior Trainer/PA specific issues are addressed in either option.

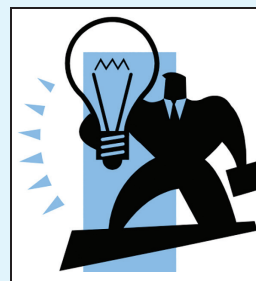
Key elements of the training for the Buddy Program — option 1:

- Placement into a like-sized hospital
- PA buddy training — (two PAs per two-day onsite training)
- Both PA and hospital UR insight provided
- Lunch provided for networking "quiet time"
- Dutch Treat dinner with faculty to continue Day 1 discussions
- Phone support for 30 days post onsite (to be finalized)
- Hotel coordination
- Identify key 'outcome based' criteria for PA program
- Discuss additional training needs, if requested

Recommended focus areas covered in BOTH of the two-day onsite training with two onsite trainers — UR and PA leaders:

- Kick off training on understanding inpt vs obs; non-Medicare payers challenges (PA and ARS)
- Daily rounding with UR team and PA
- Medicare calls/disputes/ QIO calls
- Attend a UR committee
- Peer to Peer — exposure with different payers/disputes
- When it doesn't go right — condition code 44
- How to handle inpt self-denials?
- Ongoing dialogue with ordering providers
- Working with UR — time to convert? Payer challenges?
- Involvement with denials — writing an appeal, participating in an ALJ hearing (if possible)
- Shadowing PA and/or UR for full two days

At the end of the two days, the PAs will be able to continue in their learning adventure with enhanced skills, while networking with the experienced PA.



Moving from the weeds to the collective learning experience!

- Pricing:**
- Discount will be given for attendees at the PA/UR Boot camp. **Save \$250 per attendee.**
 - Discount will be given for multiple PAs from the same facility or health system. **Save \$250 for each attendee.**

Continuing Education: Certificates of participation/completed training hours will be issued for the attendees to apply for CEUs independently.

PS: Optional pre-onsite patient status audits are very helpful to incorporate into the onsite training. Ask about this exciting option too!

Go to our webpage for more information:

www.arsystemsdayegusquiza.com — under boot camp

CONTACT US FOR TWO-DAY PA ONSITE TRAINING

Name: _____

Hospital/Health System/Group: _____

Address: _____

Email address (required): _____

Phone (required): _____



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