



**hfma** iowa chapter  
healthcare financial management association

[www.hfmaiowa.org](http://www.hfmaiowa.org)

## Iowa HFMA Summer Meeting

July 21- 23, 2010  
**Hilton Garden Inn**  
8600 North Park Drive  
Johnston, Iowa 50131  
515-270-8890

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Wednesday, July 21<sup>st</sup>, 2010

### **Summer Golf Outing** The Legacy Golf Club – Norwalk, Iowa

**11:00 AM Shotgun Start**  
See Registration Information attached – sign up before July 16, 2010.  
Contact Darren Osten ([dosten@seimjohnson.com](mailto:dosten@seimjohnson.com)) for details.

Thursday, July 22<sup>nd</sup>, 2010

**7:30 AM Registration/Continental Breakfast**

**8:15 AM Welcome**  
Paul Baumert, *Iowa HFMA Chapter President*

**8:30 AM Critical Access Hospital: Reimbursement Update,  
Risks and Opportunities**  
Brian Green, CPA, FHFMA, Healthcare Services Partner, *Seim Johnson*  
Marty J. Dubas, CPA, FHFMA, Healthcare Services Partner, *Seim Johnson*  
Randy D. Hoffman, CPA, FHFMA, Healthcare Services Partner, *Seim Johnson*

Operating a financially successful Critical Access Hospital (CAH) requires knowledge of the distinct reimbursement opportunities available and their impact on operational performance. This session will provide an overview

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of recent legislative and regulatory changes impacting CAH's, provide comparative historical financial performance ratios for Iowa CAH's and the surrounding region, and the identification of strategies to strengthen the financial performance by obtaining adequate and appropriate Medicare reimbursement for services provided.

Objective:

- Identify legislative/regulatory changes and assess the impact on CAH's
- Review historical financial performance ratios of Iowa CAH's
- Develop strategies to minimize risks and capitalize on reimbursement opportunities

**10:00 AM      Networking Break**

**10:30 AM      We're Covered for That, Right? Frequent Uninsured  
and Uninsurable Risks and Strategies to Protect Yourself"**

John Marshall, Principal, Healthcare Risk Services, *Silverstone Group*  
Timothy Langdon, Project Analyst, Healthcare Risk Services, *Silverstone Group*

Frequently, purchasing insurance is not the most effective way to manage risk. In fact, up to 2/3rds of the risks you face are not insurable. Through our work with hundreds of healthcare clients, we've gathered a vast amount of information on the uninsured mistakes of these businesses.

Objective:

The goal of this presentation is to share information with you that will help you begin thinking about how to proactively manage your uninsured risks.

**12:00 PM      Lunch**

**1:00 PM      Medicare 3-Day Payment Window**

David Jupp, President, *MCare Solutions, Inc.*

Explanation of regulations surrounding the 3-Day Payment Window, the compliance impact and how to maximize underpayment reimbursements.

Objective:

- Understand the current 3 day regulation and how to remain in compliance
- Understand the process steps required to employ a compliant solution

**2:30 PM      Provider Panel Discussion: 3-Day Payment Window**

Objective:

Iowa Providers will discuss procedures they have in place to comply with regulations.

**3:00 PM      Networking Break**

**3:30 PM**      **New Standards for Hospital Tax Exemption:  
Understanding and Implementing the New PPACA Requirements**  
John R. Holdenried, Partner, *Baird Holm LLP*

Senator Grassley's concerns about what hospitals do to earn their federal income tax exemption led to a compromise provision in PPACA specifying new requirements for hospital tax exemption. This session describes the background for and terms of these changes, and what hospitals must do now to meet these standards and assure continued tax exemption.

Objective: Attendees will understand what their hospitals need to do to comply with the new requirements of Section 501(r) of the Internal Revenue Code, including community needs assessments, financial assistance policy, limitations on charges, and billing and collection practices

**4:30 PM**      **Adjourn**

**5:00 PM**      **Hospitality – Farmers Market / Music in the Junction**  
Historical West Des Moines Valley Junction  
Sponsored by: **H&R Accounts/MedPay/PMD**

**\*\* See separate registration attachment – RSVP by July 20 to:  
Darren Osten ([dosten@seimjohnson.com](mailto:dosten@seimjohnson.com))**

**Friday, July 23<sup>rd</sup>, 2010**

**7:30 AM**      **Registration/Hot Breakfast**  
Sponsored by: **BKD, LLP**

**8:15 AM**      **Physician Hospital Relationships: The Next Wave of Integration**  
Shannon Lorbiecki, Principal, Health Care, *LarsonAllen LLP*

Objective:

Participants will achieve an understanding of:

- Trends influencing physician hospital relationships
- A range of relationship models including co-management agreements, joint ventures, and professional services agreements
- Learnings from physician practices and hospitals that have implemented each of the models through case studies

**9:15 AM**      **HFMA 101 – The Value of HFMA**  
Mike Dewerff, Past-President, Iowa HFMA  
Paul Baumert, President, Iowa HFMA

Objective:

Provide the attendees with a summary of benefits and resources available to members of HFMA. Present the 2009 Iowa HFMA Survey results and communicate ways to provide feedback to better serve the Iowa members. Review how the Iowa Chapter's performance is measured and how it compares to other chapters in the country.

**10:00 AM**      **Networking Break**

**10:15 AM**      **Iowa Hospital Association Update**  
Shannon Strickler

**11:00 AM**      **Payor Updates**  
Medicaid - Leann Howland  
Wellmark - Sheryl Terlouw  
United Healthcare - Anne Hartwig  
WPS Medicare – Aileen Sigler

**12:00 PM**      **Adjourn**

**12:00 PM**      **Board of Directors Meeting**

# Speaker Bios:

**BRIAN GREEN**, CPA, FHFMA, Healthcare Services Partner  
*Seim Johnson*

Brian Green, healthcare services partner with the audit and accounting firm of Seim Johnson, provides services to healthcare and not-for-profit industry clients. Brian is an active member of Healthcare Financial Management Association (HFMA). He has served in various officer and board of director positions of the Nebraska Chapter of HFMA including leading the chapter as President in 2000. Brian recently concluded a two-year term serving HFMA as the Regional Executive for the nine local chapters in Region 8 of HFMA. The responsibility of serving as Regional Executive is to be the liaison between National HFMA and the local chapters. Brian is currently serving a three-year appointment to the Chapter Advancement Team of National HFMA. Within HFMA, Brian successfully completed the requirements to be certified as a Fellow and has been awarded the Medal of Honor, the highest individual award granted by HFMA, for his leadership and commitment to HFMA and the healthcare industry.

**MARTY J. DUBAS**, CPA, FHFMA, Healthcare Services Partner  
*Seim Johnson*

Marty Dubas, healthcare services partner with the audit and accounting firm of Seim Johnson, provides services to healthcare and not-for-profit industry clients. He is an active member of Healthcare Financial Management Association (HFMA), and has served in all of the officer positions of the Nebraska Chapter of HFMA, including leading the chapter as President in 2005. Within HFMA, Marty successfully completed the requirements to be certified as a Fellow and has been awarded the Muncie Gold Award for outstanding service to HFMA based upon active membership and volunteer activities to the Organization.

**Randy D. Hoffman**, CPA, FHFMA, Healthcare Services Partner  
*Seim Johnson*

Randy Hoffman, healthcare services partner with the audit and accounting firm of Seim Johnson, provides services to healthcare, governmental and not-for-profit industry clients. He is an active member of Healthcare Financial Management Association (HFMA). He has served in various officer positions of the Nebraska Chapter of HFMA and is the immediate past President of the Nebraska Chapter. Within HFMA, Randy successfully completed the requirements to be certified as a Fellow and has been awarded the Muncie Gold Award for outstanding service to HFMA based upon active membership and volunteer activities to the Organization.

**JOHN MARSHALL**, Principal, Healthcare Risk Services  
*Silverstone Group*

John Marshall is currently head of the Healthcare Risk Services practice area for SilverStone Group where he handles several Midwest educational institutions as clients.

Throughout his career, John has developed an expertise in medical malpractice insurance and risk management. John has also developed a proprietary risk identification process at SilverStone Group that helps healthcare and educational organizations control business risk.

John is a frequent contributor to local trade journals and a public speaker at several healthcare associations each year, providing unique data on risk management and medical malpractice market conditions. His articles on the subject of medical malpractice and risk management have been featured in national publications such as Medical Economics.

John's team currently works with associates throughout SilverStone Group to develop strategies to reduce the total cost of risk for clients in the healthcare industry. His team works with over 700 healthcare providers and entities across the Midwest.

He has previously served for two-year terms as board chairman of the VODEC and the Southwest Iowa Red Cross Chapter. He has also worked with several other philanthropic organizations over the last 15 years. In 2005, John was honored as one of the top 40 business professionals under the age of 40 by the Midlands Business Journal, an Omaha publication.

**TIMOTHY LANGDON**, Project Analyst, Healthcare Risk Services  
*Silverstone Group*

Tim has 5 years of experience in the healthcare, insurance and wellness industries. His undergraduate degree in Health Administration & Policy, combined with his Juris Doctorate, gives Tim specific expertise in legal matters, risk management, compliance and client management.

As Project Analyst for SilverStone Group's Healthcare Risk Services division, Tim develops and manages high-level client relationships. By conducting internal legal research and analysis involving insurance and business-related regulatory issues, he creates unique risk management strategies to help healthcare clients mitigate risk.

Tim co-authored articles on medical debt collection and the insurance and legal implications posed by Recovery Audit Contractors (RAC) for SilverStone Group's *SilverLink* newsletter. He also wrote an essay entitled, "Ethics in All Things: Creating a System of Ethics in a Healthcare Organization," which won second place in the Hill-Rom National Essay Competition for Healthcare Management.

Tim excels at applying legal and business knowledge to the many unique issues that healthcare providers face, enabling his clients to avoid risks, operate more profitably and find greater satisfaction in the practice of medicine.

**DAVID JUPP**, President  
*MCare Solutions, Inc*

David Jupp is a 25+ year veteran of revenue cycle operations having held management positions nationwide with acute care organizations ranging from 150 beds to multi-hospital CBOs. In 2005, he founded MCare Solutions, Inc. to provide niche Medicare underpayment reimbursement recovery services. MCare is responsible for nearly \$100 million in underpayment reimbursements to more than 300 for-profit and not-for-profit hospitals from Alaska to Florida, individual community hospitals and regional and national healthcare systems.

**JOHN R. HOLDERIED**, Partner  
*Baird Holm LLP*

John R. Holdenried is a partner of Baird Holm LLP in Omaha, Nebraska. While he provides a full range of health law services to healthcare providers, Mr. Holdenried concentrates on regulatory, transactional, and contracting issues; managed care contracting and network formation; tax exemption; and corporate compliance issues, including reimbursement, tax, Stark, and fraud and abuse.

He received his undergraduate degree from Creighton University, B.S., Business Administration, magna cum laude, 1972, and his law degree from the University of Michigan Law School, cum laude, 1975.

He is the Program Chair of the annual Tax Issues for Healthcare Organizations program of the American Health Lawyers Association, and a member of the IRS Council for Tax Exempt/Governmental Entities for the Midwest Region.

**Shannon Lorbiecki**, Principal, Health Care

*LarsonAllen LLP*

Shannon Lorbiecki is a principal with LarsonAllen specializing in strategic planning and positioning and mergers/affiliations for a variety of health care clients. Her practice focuses on assisting physician practices and hospitals with consideration and implementation of affiliation models.

Shannon's consulting practice focuses largely on strategic planning and positioning of health care organizations and health care affiliations and mergers. Shannon is also involved in operations improvement and market assessment/demand analysis engagements. Shannon's clients include academic medical centers, community health care systems, rural hospitals and physicians groups, and physician practice organizations.

Shannon possesses expertise in health care consulting including strategy, operations and performance improvement, service line planning, and marketing. She is actively involved in market assessment and demand for services for a variety of health care clients. She regularly assists with the implementation and development of strategies to position organizations for success.

Shannon offers 20 years of experience in the health care management field. Prior to joining LarsonAllen, she worked for two health care management consulting practices.

She has also served in a variety of roles within health care systems including serving as a director of clinical integration for a large health care system in Minneapolis where she had service line responsibility across the continuum including outpatient, acute, and post acute care; and director of marketing for an academic medical center.

Shannon received her MHA degree from the University of Minnesota where she also earned her BA in Chemistry.

**SHANNON STRICKLER**, Director of Government Relations and Staff Legal Counsel

*Iowa Hospital Association*

Shannon is the Director of Government Relations and Staff Legal Counsel for the Iowa Hospital Association. She has responsibilities for legislative strategy and policy development, finance policy, and providing legal analysis and guidance to IHA members. Shannon is a graduate of Simpson College and Drake University Law School. She joined IHA in June 2002 as an attorney and lobbyist. Shannon is a member of the Iowa State Bar Association, the American Bar Association, the Iowa Society of Healthcare Attorneys and the American Health Lawyers Association.

**LEANN HOWLAND**, IME Education and Outreach Representative

*IME – Medicaid*

Leann has been with Iowa Medicaid for the last nine (9) years with Iowa Medicaid. Prior to that she spent several years with Cigna. Leann received her BS from Iowa State and MHA from Des Moines University.

**SHERYL TERLOUW**

*Wellmark*

**ANNE HARTWIG**

*United Healthcare*

**AILEEN SIGLER, Part A Outreach Analyst**

*WPS - Medicare*

Aileen Sigler brings 12 years of Medicare Claims experience to her position as a Part A Outreach Analyst for Wisconsin Physicians Service (formerly Mutual of Omaha Medicare). Her primary job responsibilities involve provider education and training by facilitating educational seminars and in-services to hospitals, skilled nursing, mental health and outpatient rehabilitation facilities. Aileen is also an active member of the Nebraska chapter of the American Society for Training and Development (ASTD). She served on the Executive Board of Directors as Director of Awards and Vice President of Programming from 2006-2008.

**Will you be sitting for the HFMA certification exam during the Summer Meeting?**

If you will be taking the certification exam during the meeting, **please contact Monica Sutter** at **515-362-5144**, or [suttermj@ihs.org](mailto:suttermj@ihs.org) to make appropriate arrangements. The Member taking the exam is responsible for payment to the national organization for all certification fees and completion of all paperwork related to the certification exam, prior to taking the test.

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**CPE Credit.** This program qualifies for continuing professional education hours. Please contact your state's Board of Accounting regarding the necessary information that you need to maintain as the Chapter does not submit nor maintain any CPE records.

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**Iowa HFMA Summer Meeting - Registration**

**July 21 – 23, 2010**  
**Hilton Garden Inn**  
8600 North Park Drive  
Johnston, Iowa 50131  
515-270-8890

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

Organization: \_\_\_\_\_

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

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

HFMA Member: \_\_\_\_\_ Yes (Member # \_\_\_\_\_) \_\_\_\_\_ No

<u>Education Fees:</u>	<u>Member</u>	<u>Non-Member</u>
Early Registration	\$105.00	\$160.00
Registration	\$130.00	\$185.00

Early registration must be received before July 14, 2010.

All registration fees are per individual and cannot be split between multiple people. Credit in full will be issued if canceled at least 7 days prior to the scheduled program. Cancellations made 3 to 6 days prior to the program will receive a 50% credit and cancellations within 3 days of the program will receive no credit, as final commitments to the Hotel are due three days in advance of the meeting.

The hotel block for rooms is available until June 30, 2010 at a rate of \$84/per night. Please call (515) 270-8890 or click on the link [http://hiltongardeninn.hilton.com/en/gi/groups/personalized/DSMUHGI-HHM-20100721/index.jhtml?WT.mc\\_id=POG](http://hiltongardeninn.hilton.com/en/gi/groups/personalized/DSMUHGI-HHM-20100721/index.jhtml?WT.mc_id=POG)

Registration is available at <http://www.hfma.org/templates/InteriorMaster.aspx?id=21255> for those attendees who wish to pay with a credit card. Attendees paying with a check or in-person at the meeting can fax or e-mail (memberservices@hfma.org) the registration if payment is not available prior to the meeting date. **Credit Card payment only accepted through on-line registration.**

**Attendees are encouraged to register in advance to allow the chapter to provide sufficient guarantees to the hotel.**

Make checks payable to: **HFMA**

Mail payments  
and registration to: **HFMA Member Service Center**  
Dept 77-6063  
Chicago, Illinois 60678-6063  
Phone: 1-800-252-4362, ext. 2  
Fax: 708-531-0665

**Dress is Business Casual**

**Please remember that meeting room temperatures are often difficult to moderate, so you may need a sweater or jacket.**