

# HFMA Region 2 Annual Fall Conference Charting Your Course

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October 11 – 13, 2023  
Turning Stone Resort and Casino,  
Verona, NY

**hfma**<sup>TM</sup>  
region 2





## CONFERENCE HIGHLIGHTS

- Networking opportunities
- Earn up to 15 CPE hours
- Prize opportunities
- Wednesday & Thursday night social events

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Today's healthcare financial teams are looking for innovative ways to make a difference in their organizations and in their communities by searching out new pathways to excellence. HFMA is at the forefront of this process with thought-provoking discussions, new learning opportunities and informatics to help you drive that change. Join us for the HFMA Region 2 Annual Fall Conference and get ready to re-imagine some core concepts and explore what's possible! We have crafted an educational experience that will inspire you to chart your own course into what healthcare can be in 2023 and beyond!



# Schedule at a Glance

Wednesday,  
October 11,  
2023

## Preconference Healthcare 101 Series

12:00pm -  
1:15pm

### **Healthcare Accounting 101**

Presented by Lumsden & McCormick, LLP

1:30pm -  
2:45pm

### **Cost Report 101**

Presented by Healthcare Management  
Solutions LLC

3:00pm -  
4:30pm

### **Revenue Cycle 101**

Presented by Huron Managed Services

5:30pm -  
7:30pm

### **Wednesday Night Social Event**

Tin Rooster

Wednesday's Preconference Healthcare 101 Series is included with full conference registration.



# Schedule at a Glance

Thursday,  
October 12,  
2023

Featuring  
Strategy,  
Revenue Cycle  
and Finance  
Break Out Tracks



7:00am – 8:00am

**Registration and Breakfast**

8:00am – 8:15am

**Welcome and Opening Remarks**

Wendy Leo, HFMA Region 2 Regional Executive

8:15am – 9:30am

**Keynote Presentation – What Would “Disneyfied” Health Care Look Like? (AND WHAT WOULD PROVIDING IT FEEL LIKE?)**

Louie Gravance, Former Disney Institute Professor

9:30am – 10:00am

**Vendor Fair Break**

10:00am - 11:00am

**BREAK OUT TRACKS**

*Strategy Track Session 1*

**To Have & To Hold: Improving Employee Retention While Achieving Cost Savings**

Presented by AON

*Revenue Cycle Track Session 1*

**The Evolution and Current State of E.H.R. Systems & The Impact On Your Ability To Improve Patient Engagement & Collection Efficiency At The Front End Of The Revenue Cycle**

Presented by AccuReg

*Finance Track Session 1*

**Creative M&A Structures For Non-Core Asset Divestitures**

Presented by Lument



# Schedule at a Glance

Thursday,  
October 12,  
2023

Featuring  
Strategy,  
Revenue Cycle  
and Finance  
Break Out Tracks



11:00am – 11:30am **Vendor Fair Break**

11:30am – 12:30pm **BREAK OUT TRACKS**

*Strategy Track Session 2*

**Re-Think The Value Your Health System Brings To Patients, Employees, Vendors, & The Community**

Presented by The Bonadio Group and Wintergreen, Inc.

*Revenue Cycle Track Session 2*

**Fewer Clinical Denials Start With Taking Control**

Presented by Acclara

*Finance Track Session 2*

**FHA Credit Enhancements For Healthcare Facility Mortgages – Lowering The Cost Of Capital**

Presented by U.S. Department of Housing and Urban Development

12:30pm – 1:15pm **Lunch and Vendor Fair Break**

1:15pm – 2:15pm **General Session – It's Time**

Dennis E. Dahlen, FHFMA, CPA, HFMA National Chair  
Chief Financial Officer, Mayo Clinic

2:15pm – 2:45pm **Vendor Fair Break**

# Schedule at a Glance

Thursday,  
October 12,  
2023

CFO Panel

2:45pm – 4:15pm

**CFO Panel: Charting The Course For Financial Success**

Moderator: Nicholas C. Rivera, CPA, FHFMA

4:30pm – 5:30pm

**Networking Cocktail Hour**

Vendor Hall

9:00pm – 11:00pm

**After Party Networking**

Turquoise Tiger



# Schedule at a Glance

Friday,  
October 13,  
2023

Presenters:  
Dr. Thom Mayer  
David Johnson  
KPMG  
HANYS



7:15am – 8:00am	<b>Breakfast and Vendor Fair</b>
8:00am – 8:15am	<b>Welcome and Opening Remarks</b> Debra Trumbull, Conference Chair
8:15am – 9:30am	<b>Keynote Presentation – Battling Burnout And Restoring Resilience</b> Dr. Thom Mayer
9:30am – 10:00am	<b>Vendor Fair Break</b>
10:00am – 11:00am	<b>General Session – The Customer Revolution In Healthcare</b> Presented by David W. Johnson, CEO, 4sight Health
11:00am – 12:00pm	<b>General Session – Medicaid Audits</b> Presented by KPMG
12:00pm – 12:15pm	<b>Break and Lunch served</b>
12:15pm – 1:15pm	<b>General Session – Federal and State Update</b> Presented by HANYS
1:15pm – 1:30pm	<b>Closing Remarks</b>

# Registration Information

Register online at: <https://cvent.me/WqmmK7>

Registration Fees	Early Bird (register by July 31)	Regular (register after July 31)
Certified Members	\$335	\$400
Members	\$385	\$450
Non-Members	\$550	\$650

Wednesday and/or Thursday night social guest fee is \$75/night. One guest allowed per registered conference attendee per night.

Registration closes September 30, 2023.

Hotel information and room codes are available at:  
<https://cvent.me/WqmmK7>





# Registration Information

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## **Cancellations**

A refund of the conference registration fee (less a \$100.00 processing fee) will be granted if cancellation is received at least 14 days prior to the event date. Cancellations requested after September 27 will not be refunded. Substitutions may be permitted. Cancellations must be submitted in writing by email to [kzebrowski@hmsconsultants.com](mailto:kzebrowski@hmsconsultants.com).

## **Schedule Changes**

Although we do our best to avoid schedule changes, occasionally it may be necessary to re-schedule or cancel programs. Registrants will receive advance notice of such changes. HFMA Region 2 cannot be responsible for any penalties incurred as a result of any changes.

## **CPE Accreditation**

HFMA Hudson Valley Chapter is approved as a New York State CPE Provider in the area of specialized knowledge. Provider Number: 002152

## **Questions?**

If you have additional questions, please contact [HFMARegion2@gmail.com](mailto:HFMARegion2@gmail.com).

## **Photography Release**

During the HFMA Volunteer Leadership Meeting, HFMA and/or its designated representatives may take photographs or video recordings of conference attendees, and HFMA may use these materials for its editorial or marketing purposes. Conference attendees acknowledge that their image, likeness, or voice may appear in these materials. By attending the HFMA Volunteer Leadership Meeting, attendees' consent to HFMA's use of their image, likeness, or voice for HFMA's editorial or marketing purposes in connection with any materials in which attendees appear.

# Session Synopsis – Wednesday, October 11, 2023

## **HEALTHCARE 101 SERIES**

### ***Healthcare Accounting 101***

Presented by: Jill M. Johnson, CPA, FHFMA, Partner, Max Donlon, CPA, Principal, and Elizabeth S. Krause, CPA, Principal, Lumsden & McCormick, LLP

This session will be aimed toward accountants new/newer to the healthcare profession and will cover basics including reporting structures, and financial statement elements for internal and external reporting. Other topics include reporting requirements (IRS, Cost Report, employee benefit plans) at a high level and internal control considerations.

### ***Cost Report 101***

Presented by Marianne L. Muise, FHFMA, Principal, Bonnie A. Amoia, MBA, FHFMA, Principal, Healthcare Management Solutions LLC

The objective of this session is to provide an overview of the Medicare and NYS Cost reports. We will review the various schedules and sources of data needed to complete the cost reports. Key elements of the software set up and compare the Medicare and NYS reports, how they are similar and how they vary. We will review the reimbursement implications and other possible uses of the cost reports and provide some Microsoft Excel tips and tools you can use to make the data compilation and analysis more efficient.

### ***Revenue Cycle 101***

Presented by Katie Taylor, Senior Director, PFS, Huron Managed Services

From scheduling to collections, each component of the Revenue Cycle is interconnected. Join Katie Taylor as she journeys through the Revenue Cycle, exploring ways that the work you do affects those around you. This session will review the phases of the Revenue Cycle, key processes, critical KPIs and downstream effects.

# Session Synopsis – Thursday, October 12, 2023

## ***Keynote Presentation – What Would “Disneyfied” Health Care Look Like? (AND WHAT WOULD PROVIDING IT FEEL LIKE?)***

Presented by: Louie Gravance, Former Disney Institute Professor

Healthcare professionals of all types are physically, emotionally and mentally exhausted from over two years of an unrelenting pandemic. Some experts have even dubbed their condition as a type of post-traumatic stress disorder caused by an overload of patients, high death rates, and ever-shifting safety guidelines. Perhaps it would be helpful to look at things a different way. Isn't it time to remind and reinforce the superpowers healthcare workers have to create “magical service moments” that far exceed the significance of a theme park experience. In fact, aren't these moments happening countless times a day and never recognized? This humorous and uplifting session explores ways healthcare teams can rediscover their service superpowers and the impact they provide endlessly to patients and co-workers alike.

## **BREAK OUT TRACKS**

### ***Strategy Track Session 1***

#### ***To Have & To Hold: Improving Employee Retention While Achieving Cost Savings***

Presented by: Drew Erra, Frank Lonadro, and Carla D'Angelo, AON

Health systems are challenged with retaining top talent while still achieving cost targets. Optimal recruitment and retention practices can save money, improve quality of care, and support a satisfied workforce. Learn about the latest trends in health system employee recruitment and retention, benefits, and key strategies and initiatives you can deploy now.

### ***Revenue Cycle Track Session 1***

#### ***The Evolution and Current State of E.H.R. Systems & The Impact On Your Ability To Improve Patient Engagement & Collection Efficiency At The Front Of The Revenue Cycle***

Presented by: Mike Haverty, Regional Sales Director – Northeast, AccuReg

With unprecedented levels of staffing issues, government mandates, and financial challenges, it is more important than ever to automate workflows that reduce staff burden and enable patients to easily access and pay for healthcare digitally. This session covers the current state of EHR vendors, based on development history and ability to code effective advancements, and how that impacts your ability to make effective intake and financial clearance improvements. While the expansion of portal functionality and the wave of 3rd self-service digital patient engagement tools has incrementally improved access, the lack of real data integrity and integration required is preventing providers from realizing a fully comprehensive and cost-effective digital front door.

This session will review the impediments provider organizations, EHR vendors, and 3rd party solutions face when seeking to improve digital patient intake solutions and some of the lessons learned. A better understanding of this landscape will enable organizations to implement the most effective solutions. Solutions that will best leverage technology to improve engagement and experience, complete administrative tasks, saving labor and reducing denials, automate the delivery of accurate estimates, start authorization processes sooner, better collect co-payments, and collect more revenue faster.

# Session Synopsis – Thursday, October 12, 2023

## *Finance Track Session 1*

### ***Creative M&A Structures For Non-Core Asset Divestitures***

Presented by: Laca Wong-Hammond, Managing Director, Head of M&A, Lument

In these turbulent times, mission-focused healthcare providers would benefit from focusing their attention and resources to core assets. This may mean different things for different providers such as reinvestments into acute care operations or expanding urgent care clinics in ancillary locations for community access. What remains true is a dearth of economic and labor resources. Lument's presentation seeks to introduce a variety of viable transaction alternatives through case study format to participants. These transaction alternatives include a sale to a third party, or a sale to employee of the non-core operation. Laca Wong-Hammond, head of M&A at Lument who led this and other ESOP conversions, and one of Lument's senior lending officers for Seniors and Healthcare Banking at Lument will speak about: 1.) Benefits and drawbacks of selling to an ESOP v. cash sale; 2.) Structuring considerations; 3.) Options available to companies (small and large) that are seeking ESOP formation; and 4.) Financing options.

The concept of an employee stock ownership plan (ESOP) may be especially intriguing to audience members, as the strategy has been gaining in popularity in recent years. Merits of an ESOP include a fair market valuation, path to liquidity, estate planning and tax advantages, and management and employee retention. These benefits are particularly compelling for an operating company (OpCo) where the real estate (PropCo) had already been monetized through a sale-leaseback transaction, or the PropCo can also be included into an ESOP. Lument Securities recently assisted one of the largest groups of skilled nursing providers in the Midwest with the successful sale and transition of approximately 36 operating affiliates, consisting of approximately 4,000 licensed beds, to a newly formed ESOP, closing on at year end 2020 – in the middle of the pandemic. As a result of the transaction, the company is now 100% employee-owned through its employee stock ownership trust. This is one of many ESOP transactions in senior care and housing that Lument professionals have advised on. More recently in 2022, Lument has brought another ESOP company to HUD financing.

## *Strategy Track Session 2*

### ***Re-Think The Value Your Health System Brings To Patients, Employees, Vendors & The Community***

Presented by: Jonathan Miller, Partner, The Bonadio Group; Rob Bloom, Principal, Wintergreen Inc.

Health systems have traditionally been economic anchors in their community, providing stability, jobs, and adding to the overall quality of life. As health systems are currently at a crossroads working to find a path of financial and operational viability, they are forced into a balancing act between generating cash flows while simultaneously serving all key stakeholders within their community.

This presentation will review high-level activities that health systems can consider to drive more value to stakeholders while improving financial and operational performance. Topics that will be discussed include new programs, employee benefit structure, community programs, and presenting your story to your stakeholders.



# Session Synopsis – Thursday, October 12, 2023

## *Revenue Cycle Track Session 2*

### ***Fewer Clinical Denials Start With Taking Control***

Presented by: Ryan O'Hara, Divisional Vice President of Consulting, Acclara

This presentation is a thought-provoking analysis of the revenue cycle in the healthcare system and the next journey revenue cycle leaders must face. It emphasizes the need for healthcare providers to invest in specialized teams to reduce clinical denials, increase bottom lines, and improve patient care and experience. The paper also highlights the importance of streamlining the revenue cycle management process, from staffing to contracting, to ensure effective communication and collaboration between clinical, contracting, and revenue cycle teams.

## *Finance Track Session 2*

### ***FHA Credit Enhancements For Healthcare Facility Mortgages – Lowering The Cost Of Capital***

Presented by: Geoffrey G. Papsco, Managing Director and Nick F. Bacque, PhD, Credit Risk Officer, Federal Housing Administration

Learn how FHA Mortgage Insurance can help lower the cost of capital for hospitals and residential care facilities looking to finance construction projects, refinance existing capital debt or make acquisitions. This session will also help attendees understand the programmatic eligibility determinants, establish a general understanding of what healthcare projects might be fit for FHA programs, and learn how to start the process.

### ***CFO Panel: Charting The Course For Financial Success***

Moderator: Nicholas C. Rivera, CPA, FHFMA, Director, FORVIS, LLP

Panelists: Frances Spreer Albert, CPA, Executive Vice President, COO, CFO, Albany Medical Center

Tom Crilly, CPA, FHFMA, Executive Vice President and CFO, Rochester Regional Health

Jeffrey H. Morgan, MBA, CPA, FACHE, FHFMA, SVP & CFO, Bassett Healthcare Network

As the peak of the COVID-19 pandemic fades and the public health emergency ends, healthcare organizations are looking to understand what their current operational, clinical and financial needs are, both now and as we look ahead. Healthcare organizations are looking at their challenges and opportunities and re-evaluating their goals and strategies to address the current and expected needs of the organization. Join us during this panel discussion with finance executives where we'll hear the top short-term and long-term challenges different hospitals and health systems are facing and how these leaders are navigating the economic strain, managing the financial operations in the time of disruption, and goals and strategies they are deploying to help secure their organizations for long-term financial sustainability and success.

# Session Synopsis – Friday, October 13, 2023

## ***Keynote Presentation – Battling Burnout And Restoring Resilience***

Presented by: Dr. Thom Mayer, Medical Director, NFL Players Association

It didn't take a world-wide pandemic to make leaders realize that the stresses from daily work at the edge of high performance, coupled with the difficulties of daily living, have produced a crisis of burnout, where job stressors exceed the personal and organizational resilience/adaptive capacity to deal with them, resulting in the 3 cardinal symptoms of burnout, emotional exhaustion, cynicism, and loss of meaning at work. As one of healthcare's most respected leaders-and in his role as Medical Director of the NFLPA, Dr. Mayer leads from the front, with passion and purpose, which has led him to develop a pragmatic set of solutions to the burnout crisis for leaders in all businesses. Far from a "touchy, feely" talk, this session resonates with stories from the NFL, businesses, national leaders, and others, all in service of developing personal and organizational resilience.

## ***General Session – The Customer Revolution In Healthcare***

Presented by: David W. Johnson, CEO, 4sight Health

Attendees will gain an understanding of the macro forces revolutionizing the healthcare industry from both the inside out and the outside in. The session will focus particular attention on the need for health systems to become more effective on both revenue generation and cost management of service offerings to create value for customers and maintain market relevance.

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