Tuesday, April 9

TU01 - Home Health Reimbursement and Billing Best Practices Pre-Con

Time: 1:00-5:00 PM
Audience: HH, Financial Managers
Speakers: Mike Carr PT*, Axxess;* Elizabeth Wilson CPA*, FORVIS*

Description:
Session 1: PDGM from Soup to Nuts
Medicare Home Health reimbursement (PDGM)is one of the most complicated payment systems in health care delivery continuum. PDGM has been the biggest change the home health industry has experienced in 20 years. With 432 ways to be paid using Home Health Resource Groups (HHRG's) and multiple payment determinants, it is not a wonder that owners, operators, and managers are having difficulty digesting this alphabet soup! This webinar will break PDGM down to soups and nuts so that organizations can thrive with the recommended best practices presented. By mastering PDGM, organizations are well positioned in its ability to focus on necessary changes in preparing for Value Based Purchasing (VBP). Don't miss your chance to improve both top line and bottom-line revenue with the tips provided by our experts!

Session 2: Satisfy Your Appetite for HHVBP Success
With constant reimbursement pressures and 5% of revenue at risk related to outcomes with HHVBP, organizations must focus on operational efficiencies that will mitigate losses imposed due to the evolving reimbursement landscape. There will be winners and losers with Value Based Purchasing (VBP). With our expert tips and best practices, you will establish a clear path to VBP success.

Session 3: Get the entire meal prepped and ready, with revenue cycle strategies from admit to collections. Learn how everything works together for financial success from your clinicians to your back office. It takes everyone on board to understand all of the moving parts that affect your revenue cycle processes and financial results.

Objectives:
- Explore the evolution of PDGM as a CMS budget neutral initiative reimbursement model for home health.

- Understand the payment determinants for PDGM as a foundation for building operational and financial practices different from original PPS.
- Learn operational best practices designed to improve the bottom line while enjoying PDGM success resulting in positive patient outcomes.
- Explore the CMS Proposed Rule and regulatory reductions as it relates to CBSA codes and PDGM revenue determinants.
- Understand the importance of positive patient outcomes as they relate to Value Based Purchasing and explore methods for “winning” with VBP.
- Develop a QAPI program using Key Outcome and Performance Metrics designed to improve VBP scores and ensure financial success.
- Learn best practices for revenue cycle and billing processes to promote a healthy accounts receivable and strong collection rates, contributing to your overall financial performance.
- Understand the connections between PDGM and VBP to revenue cycle and billing for your organization.
- Learn where and how your revenue is affected due to different types of revenue cycle adjustments such as LUPAs, PEPs, PDGM early/late and community/institutional.
- Develop financial and operational strategies with the ever increasing growth in Medicare Advantage plans in the industry, from admit to payment and all of the complicating factors in-between.

Bios:
Mike Carr is a Physical Therapist and Senior Product Manager for Axxess. His clinical expertise and industry knowledge has been critical to the development and implementation of the Axxess Training and Certification program. Over the past two years, Mike has been intimately involved in the design, development, and creation of Axxess Training and Certification and now oversees an international team of engineers and support personnel.

Mike joined Axxess in 2018 through the purchase of Home Health Gold. He also has nearly 20 years of experience as a physical therapist for Bangor Area Visiting Nurses in Bangor Maine.

Elizabeth Wilson is a CPA with over 20 years of accounting and management experience. Elizabeth manages the FORVIS home care and hospice revenue cycle services team. She assists home care and hospice clients in optimizing the billing and revenue cycle process by helping develop dashboards and other performance management tools. She also performs revenue and accounts receivable recovery services, client training and other revenue cycle enhancement services and is proficient in numerous home care and hospice software applications. Elizabeth is also a member of multiple Missouri Alliance for Home Care committees.

Wednesday, April 10

<u>WE01 – Welcome/Business Meeting</u>

Time: 8:00 -8:30 AM
Audience: HH, Hospice, Private Duty, Therapy
Speakers: Sara Ratcliffe, *IHHC*; Susie Platt, *Spoon River Home Health*

WE02 – Opening Keynote – Joy Jolt

Time: 8:30-9:30 AM
Audience: HH, Hospice, Private Duty, Therapy
Speaker: Kathy Parry

Description:
You and your team serve others. And that can be an energy drain. So how do you create an energized culture that can continue to give exceptional care? *Elevate the motivator behind the energy: JOY*. Not just a feel-good word, joy ignites purpose and propels teams to serve at their highest level. Like a big cup of morning coffee, Kathy Parry provides a jolt of power to increase your joy and tactics to transform your culture into one that leads with joyful purpose.

Bio:
A recognized authority in personal energy, productivity, and resilience, **Kathy Parry** activates positive changes for professional leaders. Prior to launching her own speaking and training business Kathy was a trainer for a super-regional bank on their merger and acquisition team. In this role, she helped others integrate new technology and transition through organizational transformation.

But it was personal and devastating news about her fourth child that led Ms. Parry to a career where she empowers others to become more resilient and energized. It was this role as a caregiver, that led Kathy to her work with senior living and healthcare professionals. Ms. Parry also had the privilege of working with homecare and hospice professionals during her daughter's life. Kathy helps professionals plan for resilience to positively move through disruptive circumstances. Attendees leave her sessions with an action list to power-up their lives and create positive mindsets towards change.

Kathy holds degrees in Business and Food Management from Miami University, a Certification in Plant Based Nutrition from T.Colin Campbell Program at eCornell University and a QualityCare Certification from the Alzheimer's Association She holds the designation of professional speaker from the National Speakers Association and speaks at events nationwide. Ms. Parry has authored five books and is the creator of Power UP and Perform course for senior living professionals. She lives in Canton, Ohio. where she enjoys a mild dark chocolate addiction and cooking for hungry friends.

WE03 - National Update

Time: 9:45-11:00 AM
Audience: HH, Hospice, Private Duty, Therapy
Speaker: Bill Dombi, President and CEO, *National Association of Home Care and Hospice*

Description: William Dombi, NAHC President, will present an update on federal issues concerning home care and hospice. His discussion will include extensive thoughts on the future of home health and hospice in the midst of significant changes. This session brings Washington to the stage with up-to-the minute details on the legislative, regulatory and legal matters that impact home care and hospice.

Objectives: Upon completion of this session, participants will be able to:

1. Identify trends in health care affecting home care and hospice
2. Recognize current federal legislative issues involving home care and hospice
3. Recognize current federal regulatory issues involving home care and hospice
4. Identify legal issues in home care and hospice

Bio:

Bill Dombi is the President of the National Association for Home Care & Hospice. He previously served as the Vice President for Law at NAHC. As a key part of his responsibilities, Bill specializes in legal, legislative, and regulatory advocacy on behalf of patients and providers of home health and hospice care. With nearly 40 years of experience in health care law and policy, Bill Dombi has been involved in virtually all legislative and regulatory efforts affecting home care and hospice since 1975, including the expansion of the Medicare home health benefit in 1980, the formation of the hospice benefit in 1983, the institution on Medicare PPS for home health in 2000, and the national health care reform legislation in 2010. With litigation, Dombi was lead counsel in the landmark lawsuit that reformed the Medicare home health services benefit, challenges to HMO home care cutbacks for high-tech home care patients, lawsuits against Medicaid programs for inadequate payment rates, along with current lawsuits challenging the Medicare home health face-to-face encounter rule and the Department of labor changes to the overtime rules under the Fair labor Standards Act.

In addition to litigation, Bill offers extensive community and professional educational services through lectures, publications, teleconferences, and videos. He is the Editor and lead author of Home Care & Hospice Law: A Handbook for Executives, the only comprehensive legal treatise on the topic. His lectures include market trends in home care, compliance, risk management, patient rights, fraud and abuse, health care reimbursement, legislative and regulatory reforms, and legal issues in telehealth services.

Bill Dombi is admitted to practice in Connecticut and Washington, DC. He is also admitted to numerous federal courts including, the US Supreme Court and several Court of Appeals. He has served on the Advisory Board for BNA's Health Law Report and Medicare Report. Bill also is a longstanding member of the American Health Lawyers Association and the American Bar Association.

W04 - Awards Presentation

Time: 11:00 AM-11:30 AM
Audience: HH, Hospice, Private Duty, Therapy

W05 - Lunch

Time: 11:30 AM-12:45 PM
Audience: HH, Hospice, Private Duty, Therapy

WE11 - Hospice Risk & Scrutiny: Empowering Engaged Compliance and Survey Readiness

Time: 12:45-2:00 PM
Audience: Hospice
Speakers: Katherine Morrison RN, MSN, CHPN and Cindy Campbell WS 1GXS 1R M F%2M jfqymhfwj% Nsktwr fyhx, *WellSky*

Description:
Hospice leaders and staff are faced with complex, shifting regulation paired with rising payer and compliance pressure, while also experiencing unprecedented workforce churn and stress. The OIG's focus on increased oversight, expanded survey updates and penalties, resumption of the TPE, and the public's scrutiny of outcomes all point to a growth industry under close watch. In this session, we will discuss the current environment of risk, as well as strategies you can adopt to build a stronger culture of engagement, regulatory confidence, and competence – yielding a culture of compliance.

Objectives:
1. Describe the current environment of hospice regulatory scrutiny and OIG focus on compliance
2. Explain two operational opportunities to strengthen regulatory compliance
3. Identify two practical tips on educating hospice team members on compliance and outcome improvement

Bios:
Katherine Morrison is the Director of Hospice Consulting Operations for WellSky, is an RN and holds a Master of Science in Nursing with a major in Nursing Informatics. She has served in advancing levels of hospice leadership within large, multi-site health systems both in the Midwest and on the eastern seaboard and has extensive expertise in regulatory, compliance, and operational issues. Ms. Morrison holds a certificate in hospice compliance from the National Hospice and Palliative Care Organization and is a Certified Hospice and Palliative Care Nurse (CHPN) and an End-of-Life Nursing Education Consortium (ELNEC) trainer. Katherine serves on the National Association for Home Care and Hospice – Hospice Advisory Council and Diversity, Equality and Inclusion Council. An expert hospice and palliative care practitioner, effective educator and practical operator, Ms. Morrison brings high credibility to her efforts to advance hospice practice and patient/family advocacy across the country.

Cindy Campbell is a nationally recognized thought-leader and management consultant to the continuum of healthcare at home. Cindy holds a Master of Health Administration with specialty in Healthcare Informatics, and a Bachelor of Science in Nursing. She brings deep experience leading multi-service line healthcare at home and almost 20 years with Fazzi Associates, now proud to be a fully integrated member of the WellSky family of companies. Cindy and her team help agencies leverage strategic thought and operational efficiency into organizational, work-process and clinical model design for Home Health, Hospice, Palliative Care and Private Duty organizations throughout the United States. Cindy has served as a Board Member of the National Association for Homecare & Hospice, Chair of the Pediatric Homecare & Hospice Association of America, and member of the Executive Committee of the American Telemedicine Association's Homecare and Remote Monitoring Special Interest Group. A passionate advocate for innovation on behalf of patients and industry, Cindy is committed to driving methodology to best serve the needs of advancing healthcare at home.

WE12 - Building an Effective Caregiver Retention Strategy

Time: 12:45-2:00 PM
Audience: HH, Hospice, Private Duty, Therapy
Speaker: Colby Mfxxkzwymjw, *HHAeXchange*

Description

Caregiver turnover continues to be one of the greatest challenges facing the homecare industry. While many agencies have leveled up their recruitment processes, they still struggle to retain caregivers. Join us for a panel discussion on how to build an effective and efficient caregiver retention strategy. We'll dive into the current state of caregiver retention and answer questions, including: What are the top challenges that agencies face today? What are some ways agencies can address this problem? What's on the horizon? HHAeXchange's Director of Client Success, Colby Hassfurther will lead a conversation with Allan Levine, SVP of Revenue and Growth at Nevvon and Josh Kondik, Vice President from HCP.

Objectives

1. Observations from the field – what other providers are saying about caregiver retention and trends that are having an impact on the industry
2. Purpose-built tools that can help enhance your caregiver workplace experience
3. Programs you can leverage to improve caregiver job satisfaction, and why they work

Bio:

WE13 - Manning the Crow's Nest - Using Relevant Metrics and KPI's to Drive Achievement of Agency Objectives

Time: 12:45-2:00 PM
Audience: HH, Hospice, Private Duty, Therapy
Speaker: Phil Feldman*, Sandata Technologies*

Description:

Achieving agency success, or even just survival, is more complex than ever. The main goals - providing excellent client care, achieving growth, and optimizing financial results, are inescapably intertwined. However, it is inordinately inefficient to review and react to reams of data to determine which areas require attention to accomplish agency objectives. This presentation discusses how to identify relevant metrics and KPI's (Key Performance Indicators), based on agency objectives and environment, that can be used to impact behaviors needed to achieve those goals.

Objectives:
In this session, attendees can expect to:

1. Identify relevant agency process areas for measurement based on current challenges faced
2. Understand how all these areas are mutually dependent
3. How to establish appropriate metrics for measurement and tracking
4. Discuss what to do with these metrics when you have them.

Bio:

Phil is a CPA with over twenty years of experience with progressively increasing responsibility in operational and financial management for national home healthcare agencies.

Phil is presently National Director of Revenue Cycle Management at Sandata Technologies, LLC, where his role is to provide thought leadership, education, and support to Sandata and the Home Care and I/DD industries in the area of Revenue Cycle Management, and to educate the provider community about the Sandata RCM business unit that provides end-to-end revenue cycle management services to home care and I/DD agencies to improve their revenue and cash flow.

Prior to Sandata, Phil worked with a very large multi-state adult and pediatric home care agency as Vice President, Operations and then as Vice President of Payer Contracting and Legislative Affairs.
Phil began his healthcare career with a large national home healthcare agency, where he held Corporate financial operations and operational support positions.

Phil has served on the Executive Board of the Home Care and Hospice Association of New Jersey, as well as Chair of the Medicaid Work Group, and on the Finance and Government Affairs Committees, as well as the Government Affairs Committee of Pennsylvania Home Care Association. He is recipient of the Carol J. Kientz Member of the Year Award for 2014 from HCA NJ. Phil currently serves on the AHHC NC Insurance and Managed Care Committee.

WE14 - Improving Wound Management Across the Continuum of Care Utilizing AI

Time: 12:45-2:00 PM
Audience: HH, Hospice, Therapy
Speaker: Cheryl Adams*, At Home Healthcare of Sparta Community Hospital*

Description:
Wound care is a critical component of healthcare, impacting the well-being and recovery of countless patients worldwide. Effective wound management accelerates healing and reduces the risk of complications, infections, and the associated economic burden on healthcare systems. A digital wound management solution offers transformative benefits to patients, clinicians, and administrators alike. For patients, it empowers them to actively engage in their care by providing a user-friendly interface to view images captured by the clinician fostering a sense of control and involvement in their healing process. Providing wound care clinicians with digital tools can affect clinicians in powerful ways. On the most immediate level, streamlining and shortening an otherwise laborious assessment process frees up valuable time that can be dedicated to what matters most: treating and communicating with the patient. Standardized and easily accessible wound records, available to all relevant staff members online, also allow for far greater flexibility when deploying and managing staff. The realities of contemporary care are such that a single patient is often seen by a rotating group of clinicians.

Objectives:
1. Identify the components of quality documentation for patients with wounds.
2. Identify the inconsistencies in wound documentation and consequences of such.
3. Identify the benefits of AI for wound management.

Bio:

Cheryl Adams is a Registered Nurse with 44 years of nursing experience in clinical and management positions with a proven background in written and oral communication skills. Cheryl developed and maintains the business plan for At Home Healthcare of Sparta Community Hospital. She is committed to having a voice for the home care industry and for the people that her agency serves to ensure they have access to the quality care that they deserve.

<u>WE21 - Visit Utilization</u>

Time: 2:15-3:30 PM
Audience: HH, Hospice, Therapy
Speaker: Laura Wilson and John Rabbia*, SimiTree*

Description: This session will discuss the appropriate and strategic allocation of resources in the reality of staffing challenges. Learn how to deliver the right care at the right time to optimize resources and attain the best outcomes for your patients.

Bios:
John Rabbia, PT, DPT, MS, MBA, COS-C, joined the SimiTree team in 2021 to provide clinical and operational consulting, offering more than 20 years of experience in leading organizations to achieve quality and financial efficiency through continuous performance improvement. Initially trained as a physical therapist and wound care consultant, John's extensive background includes agency management, operational turnaround, clinical quality, and business development.

During 2015-2018 at NYC Health & Hospitals: At Home, New York, NY, John served as Chief Quality Officer and Deputy Executive Director, managing the quality program, a health home, and internal care management agency with a workforce of 500 and serving 60,000 patients annually. He also served as the Associate Executive Director, leading home health operations in four city boroughs, and as Director of Quality Assurance and Health Care Standards, managing multiple community settings and improving standards of excellence for New York City's publicly operated Federally Qualified Health Center.

From 2007-2015 at VNA Homecare, Syracuse, NY, John held progressive roles including Executive Vice President, Director of Performance Excellence and Compliance Officer, following five years of service as Quality and Education Supervisor for the rehabilitation and wound care program. He has a strong foundation of expertise as both a wound care consultant and physical therapist.

Certified in EpicCare Home Health and as an OASIS specialist, John also has extensive experience with Homecare Homebase as a provider and consultant, supporting design, validation and implementation efforts that include testing, training, and live support to develop teams. He earned an MBA in healthcare management from Western Governor's University, Salt Lake City, and completed certificates of advanced study in public health and health policy management at Syracuse University. In addition to earning his doctorate in physical therapy at Temple University, Philadelphia, he graduated from Ithaca College, with an M.S. in Physical Therapy and a B.S. in Clinical Science.

Active in our industry as a key collaborator, author, and educator for many years, John is a member of the quality and policy committees of the Home Care Association of New York State, where he previously served on the Board of Directors. He is also a member of the American Physical Therapy Association, and a diplomat of the American Academy of Wound Management.

Since she began her career in home-based care in 1985, **Laura Wilson** has served in clinical and operational leadership roles throughout the western United States, Minnesota, Washington, and Florida. She brings extensive expertise in leadership, multi-site operations, quality management, human resources, compliance, and business development to her role as SimiTree's Managing Director, Operations and Clinical Consulting. Wilson is a popular lecturer at industry events on topics ranging from best practices under PDGM to effective use of telehealth.

WE22 - Who are the People in Your Neighborhood?

Time: 2:15-3:30 PM
Audience: HH, Hospice, Private Duty, Therapy
Speaker: Ryan Klaustermeier*, Axxess*

Description:

With increased admissions, shorter lengths of stay, staff turnover and a staffing crisis, it is easy for IDG meetings to become a paper process rather than the critical engine driving the highest quality and most compliant care. This session will discuss the key elements of healthy, productive relationships, how to develop them quickly and sustain them over time, and the effect relationships have on the quality of care provided.

Objectives:

1. List five ways to overcome relationship barriers
2. Describe three ways to quickly develop and maintain healthy relationships
3. Identify four ways that technology supports the relationships of IDG members
4. Recognize one way that strong IDG relationships equate to the provision of the highest quality of care

Bio:

Ryan Klaustermeier is the Vice President of Professional Services at Axxess, the fastest-growing home healthcare technology company. In this role, Ryan demonstrates the value of professional services and solutions to assist clients with industry challenges. He is an end-of-life and advanced illness industry expert with 16 years of experience across a variety of roles clinically and operationally. Most recently, he served as the Vice President of Innovation at Heart of Hospice.

Ryan is recognized by his peers as a skilled Registered Nurse and operator for ensuring regulatory compliance, financial performance and growth. He began his hospice career as a CNA before serving as an LPN, an RN Case Manager, a Director of Nursing and then an Administrator.

Ryan is a strong advocate for hospice and palliative care, chairing the National Palliative and Palliative Care Organization's Next Generation Leadership Council. He previously served as a board member of both The Wisconsin Hospice and Palliative Care Association, and the Illinois Hospice and Palliative Care Organization.

Ryan is a member of the Class of 2019 of Madison, Wisconsin's 40 under 40, and was also the recipient of the Leadership Award for Madison's Top Nurses of 2020.

Ryan earned his master's degree in nursing leadership and management from Western Governors University.

WE23 - Hospice Clinician Boundaries: Achieving Balance and Avoiding Burnout

Time: 2:15-3:30 PM
Audience: Hospice
Speaker: Katherine Morrison and Cindy Campbell*, WellSky*

Description:
The intimacy of care delivery at end of life coupled with supporting higher acuity and complex needs of patients and families puts the members of the IDT at risk for workforce stress. Hospice is fraught with opportunities to lose sight of where professional responsibilities end and personal accountability begins. Preserving the sacred work of hospice, while recognizing where to draw the line in actions and in words holds big impact. Join this important discussion to learn how recognizing and maintaining professional boundaries will help protect your clinicians, patients and families, and agency while building communication skills and self-care tools.

Objectives:
1. Describe the importance of establishing clear professional boundaries in hospice and palliative care delivery
2. Explain two ways effective boundary-setting impacts compassion fatigue and burnout
3. Discuss the impact of maintaining healthy boundaries on patient and family satisfaction

Bios:
Katherine Morrison is the Director of Hospice Consulting Operations for WellSky, is an RN and holds a Master of Science in Nursing with a major in Nursing Informatics. She has served in advancing levels of hospice leadership within large, multi-site health systems both in the Midwest and on the eastern seaboard and has extensive expertise in regulatory, compliance, and operational issues. Ms. Morrison holds a certificate in hospice compliance from the National Hospice and Palliative Care Organization and is a Certified Hospice and Palliative Care Nurse (CHPN) and an End-of-Life Nursing Education Consortium (ELNEC) trainer. Katherine serves on the National Association for Home Care and Hospice – Hospice Advisory Council and Diversity, Equality and Inclusion Council. An expert hospice and palliative care practitioner, effective educator and practical operator, Ms. Morrison brings high credibility to her efforts to advance hospice practice and patient/family advocacy across the country.

Cindy Campbell is a nationally recognized thought-leader and management consultant to the continuum of healthcare at home. Cindy holds a Master of Health Administration with specialty in Healthcare Informatics, and a Bachelor of Science in Nursing. She brings deep experience leading multi-service line healthcare at home and almost 20 years with Fazzi Associates, now proud to be a fully integrated member of the WellSky family of companies. Cindy and her team help agencies leverage strategic thought and operational efficiency into organizational, work-process and clinical model design for Home Health, Hospice, Palliative Care and Private Duty organizations throughout the United States. Cindy has served as a Board Member of the National Association for Homecare & Hospice, Chair of the Pediatric Homecare & Hospice Association of America, and member of the Executive Committee of the American Telemedicine Association's Homecare and Remote Monitoring Special Interest Group. A passionate advocate for innovation on behalf of patients and industry, Cindy is committed to driving methodology to best serve the needs of advancing healthcare at home.

WE24 - Home Health Value Based Purchasing - The IPR Reports Detail Review

Time: 2:15-3:30 PM
Audience: HH, Therapy
Speaker: Melinda A. Gaboury, COS-C, *Healthcare Provider Solutions, Inc.*

Description:
HHVBP began January 1, 2023. This session will detail the process of the Value-Based Purchasing Model. The Interim Performance Reports began being issued July 2023 and this session will detail review these reports. The session will also review the calculation methodology of VBP Expansion and what agencies should be doing to be successful in 2024 and beyond. The HHVBP changes for 2025 will be detailed in this session.

Objectives:

Bio:
Melinda A. Gaboury is co-founder and Chief Executive Officer of Healthcare Provider Solutions, Inc. (HPS). Melinda Gaboury and Mark Cannon founded the company in April 2001 to provide financial, reimbursement, billing, operational and clinical consulting to the home care and hospice industries.

Melinda A. Gaboury, with more than 30 years in home care, has over 22 years of executive speaking and educating experience, including extensive day to day interaction with home care and hospice professionals. She routinely conducts Home Care and Hospice Reimbursement Workshops and speaks at state association meetings throughout the country. Melinda has profound experience in Medicare PDGM training, billing, collections, case-mix calculations, chart reviews and due diligence. UPIC, RA, ADR & TPE appeals with all Medicare MACs have become the forefront of Melinda's current impact on the industry. She is currently serving as the Chair of the NAHC/HHFMA Advisory Board and Work Group and is currently serving on the Board of Directors for both the Home Care Association of Florida & Tennessee Association for Home Care. Melinda is also the author of the Home Health OASIS Guide to OASIS-E and Home Health Billing Answers, 2023.

Melinda attended Cumberland University in Lebanon, Tennessee and received her Bachelor of Business Administration in Accounting. She began her career in 1991 with a large Tennessee based home care chain as a staff accountant and later joined a national healthcare consulting firm as their Reimbursement Manager.

WE31 - Safety in the Workplace

Time: 4:00-5:15 PM
Audience: HH, Hospice, Private Duty, Therapy

Speaker: Barbara Citarella RN, BSN, MS, CHCE, NHCP-BC, *RBC Limited Healthcare & Management Consultants*

Description:
The home care industry has been designated high risk for violence by the Occupational Safety and Health Administration (OSHA) as home care workers are vulnerable as they face unpredictable environments each time they enter a patient's home and community. Home care workers face a variety of safety challenges, including unsafe neighborhoods; use of mass transit; encountering other individuals, weapons and animals in the household; illicit drug use in the home and/or neighborhood; and more. This session will expand upon and highlight agencies' responsibilities in workplace safety, including the development of a workplace violence prevention plan, as well as provide education for staff on safety tips, and measures; improved situational awareness; and ways to deal with patient and family aggression and pets and weapons in the home.

Objectives:
1. Define workplace violence
2. List 5 strategies to deter violence in the workplace
3. Discuss de-escalation strategies

Bio:

Barbara Citarella is the founder of the award winning RBC Limited Healthcare and Management Consultants. She and her team of expert consultants have made the company a national leader in the home care, hospice and outpatient health care industry. She has been instrumental in developing national and state partnerships for the company.

With over 25 years of experience, Citarella is internationally known for her expertise in the areas of infection control, leadership and disaster preparedness. As the only recognized expert in the area of home care and hospice disaster planning, her groundbreaking work includes education not only to home care and hospice industry but to law enforcement, government agencies, health care providers, private sector, first responders, national and state associations. She has been involved with pandemic planning since 2009 and may of her guidance documents where used during COVID-19 pandemic, such as Reuse of Respiratory Masks and Re-opening Your Business. She serves as a subject matter expert to the U.S Assistant Secretary and Response ASPR TRACIE.

<u>WE40 – Exhibitor Reception</u>

Time: 5:15-7:00 PM
Audience: HH, Hospice, Private Duty, Therapy

Thursday, April 11

<u>TH01 – Breakfast in Exhibit Hall</u>

Time: 7:30-8:30 AM
Audience: HH, Hospice, Private Duty, Therapy

<u>TH02 – Hot Topics</u>

Time: 8:30-10:00 AM
Audience: HH, Hospice, Private Duty, Therapy
Speakers: Chloe Compton*, IHHC;* Laura Wilson & J'non Griffin, *SimiTree*

Description:

Hot off the presses! Join Chloe Compton, J'non Griffin, and Laura Wilson for up-to-the-minute federal and State regulatory and reimbursement news impacting home health, hospice and private duty providers. This much anticipated and highly informative session will leave you knowing exactly what your agency's future holds.

1. Identify recent and planned regulatory and reimbursement changes impacting agencies in Illinois
2. Identify ways agencies can comply with new and updated regulations
3. Identify how IHHC advocates for its members on regulatory matters impacting care at home

Bios:
Chloe Compton serves as Director of Regulatory and Government Affairs at the Illinois HomeCare & Hospice Council, utilizing her expertise and love for public policy to deliver high-quality service in the areas of regulation, public policy, and advocacy. Prior to joining IHHC, Chloe worked closely with legislators, lobbyists, and state agencies as a member of the Speaker's Staff. In her capacity as lead research and appropriations analyst for healthcare and human services, she drafted and analyzed legislation and state operating budgets, facilitated legislative negotiations, and interpreted fiscal and policy data to assist legislators in making sound and well-informed decisions. Chloe earned a BA in Political Science and Communication from the University of Illinois at Springfield.

J'non Griffin launched her own outsourcing and coding company, Home Health Solutions LLC, in 2012. It was named by Inc. magazine as one of the fastest growing companies in the nation in 2017, 2018 and 2019 before merging with Simione Healthcare Consultants in 2020. When Simione merged with BlackTree in 2021, J'non took the helm of SimiTree's new coding division as a director.

J'non is a registered nurse with 30+ years of clinical and leadership experience as a field nurse, agency director, regional director, executive and consultant for home health and hospice agencies. She is an accredited ACHC and CHAP consultant and a AHIMA-approved ICD-10-CM trainer/ambassador with certifications in home care coding (HCS-D), OASIS competency (COS-C), hospice coding (HCS-H) and home care compliance (HCS-C). A frequent national speaker, she is a collaborator for Decision Health's The Diagnosis Coding Pro, has published several manuals and assisted with online coding/OASIS instruction modules. J'non earned a master's degree in health care administration in 2005.

Since she began her career in home-based care in 1985, **Laura Wilson** has served in clinical and operational leadership roles throughout the western United States, Minnesota, Washington, and Florida. She brings extensive expertise in leadership, multi-site operations, quality management, human resources, compliance, and business development to her role as SimiTree's Managing Director, Operations and Clinical Consulting. Wilson is a popular lecturer at industry events on topics ranging from best practices under PDGM to effective use of telehealth.

TH04 – Break with Exhibitors

Time: 10:00-10:30 AM
Audience: HH, Hospice, Private Duty, Therapy

TH11 – Medicare Advantage: Digging in the Details

Time: 10:30-11:45 AM
Audience: HH, Therapy
Speakers: Melinda Gaboury*, Healthcare Provider Solutions*

Description:
Home Health providers are grappling with the shift in the Medicare eligible population into Medicare Advantage Plans (MA Plans). Providers are asking: What are the implications of current demographic trends? What operational and financial issues should providers expect as their payer mix shifts to mostly Managed Care? Being successful in this environment of these payer mix changes requires agencies to understand their costs of treating these patients and other impacts on their operations on an individual contract basis.

Bio:
Melinda A. Gaboury is co-founder and Chief Executive Officer of Healthcare Provider Solutions, Inc. (HPS). Melinda Gaboury and Mark Cannon founded the company in April 2001 to provide financial, reimbursement, billing, operational and clinical consulting to the home care and hospice industries.

Melinda A. Gaboury, with more than 30 years in home care, has over 22 years of executive speaking and educating experience, including extensive day to day interaction with home care and hospice professionals. She routinely conducts Home Care and Hospice Reimbursement Workshops and speaks at state association meetings throughout the country. Melinda has profound experience in Medicare PDGM training, billing, collections, case-mix calculations, chart reviews and due diligence. UPIC, RA, ADR & TPE appeals with all Medicare MACs have become the forefront of Melinda's current impact on the industry. She is currently serving as the Chair of the NAHC/HHFMA Advisory Board and Work Group and is currently serving on the Board of Directors for both the Home Care Association of Florida & Tennessee Association for Home Care. Melinda is also the author of the Home Health OASIS Guide to OASIS-E and Home Health Billing Answers, 2023.

Melinda attended Cumberland University in Lebanon, Tennessee and received her Bachelor of Business Administration in Accounting. She began her career in 1991 with a large Tennessee based home care chain as a staff accountant and later joined a national healthcare consulting firm as their Reimbursement Manager.

TH12 – Palliative Care is not a Field of Dreams - But it Can Be!

Time: 10:30-11:45 AM
Audience: HH, Hospice
Speakers: Ryan Klaustermeier*, Axxess*

Description:
Session 1: It can be difficult to assess if starting a palliative care program is the right thing to do for your hospice. Often, hospice operators feel that starting a palliative care program will look and feel like starting and running a hospice program. However, palliative care and how it is provided is ever changing and unique to each provider, as the palliative care regulations and standards remain largely grey to this day. Understanding the basics of palliative care and starting a palliative care program is imperative to the success of launching a palliative care program

Session 2:
Maintaining a financially viable palliative care program can be difficult for many operators due to overall low reimbursement for palliative services. For a palliative program to flourish it requires that all aspects of the business, including operations, clinical, quality, and sales are interconnected. There are key areas for programs to focus on to ensure financial viability of their program. In this session we will take a deep dive into palliative care operations, quality, and compliance, as well as how to sell your palliative care program to achieve optimal outcomes for both patients and the providers.

Objectives:
Session 1:
1. Apply concepts of palliative care operations management
2. Explain palliative care quality and compliance
3. Describe how to market and sell their palliative care program

Session 2:
1. Explain how to conduct a community assessment for palliative care needs
2. Describe how to budget for a community-based palliative program
3. Describe best practices for how the palliative program and hospice program should interact

Bio:
Ryan Klaustermeier is the Vice President of Professional Services at Axxess, the fastest-growing home healthcare technology company. In this role, Ryan demonstrates the value of professional services and solutions to assist clients with industry challenges. He is an end-of-life and advanced illness industry expert with 16 years of experience across a variety of roles clinically and operationally. Most recently, he served as the Vice President of Innovation at Heart of Hospice.

Ryan is recognized by his peers as a skilled Registered Nurse and operator for ensuring regulatory compliance, financial performance and growth. He began his hospice career as a CNA before serving as an LPN, an RN Case Manager, a Director of Nursing and then an Administrator.

Ryan is a strong advocate for hospice and palliative care, chairing the National Palliative and Palliative Care Organization’s Next Generation Leadership Council. He previously served as a board member of both The Wisconsin Hospice and Palliative Care Association, and the Illinois Hospice and Palliative Care Organization.
Ryan is a member of the Class of 2019 of Madison, Wisconsin’s 40 under 40, and was also the recipient of the Leadership Award for Madison’s Top Nurses of 2020.

Ryan earned his master's degree in nursing leadership and management from Western Governors University.

TH13 – High Impact, High Value: Advanced Care Planning - Part 1

Time: 10:30-11:45 AM
Audience: HH, Hospice, Therapy
Speakers: Cindy Campbell and Katherine Morrison*, WellSky*

Description:
Part 1: As the contemporary Japanese writer Haruki Murakami noted: "Death is not the opposite of life, but a part of it." Often battling our instincts to help patients get better, informed, and competent advocacy for both home health patients and agencies is made stronger when advance care planning conversation becomes a core competency. This session will provide advance care planning conversation skills and their importance within person-centered, value-based home health. From case conference processes to embedded, focused education, we will share how agencies have achieved value-based, high-quality performance, yielding an efficient, effective transition of care between home health, advanced illness management, palliative care, and hospice.

Part 2: Advance directive conversations are a crucial aspect of patient-centered care, particularly when one's practice is in a care setting outside of hospice. Too often avoided due to a lack of confidence and competence, or concern about quashing hope, incorporating advance directive conversations into foundational home health practice ensures that patients' preferences are honored, promoting a person-centered decision-making approach to care. This key skill helps advocate and reduce avoidable hospitalization and emergent care, building your teams advocacy tools when patients and their loved ones face the ultimate progression of disease – end of life.

Objectives:
Part 1:
1. Identify common causes of gaps in the progression of care planning between home health, palliative care, and hospice
2. Explain how to support patient-centered goals as they related to advance care planning
3. Identify solutions related to gaps in providing information on advance care planning

Part 2:
1. Explain the importance of communication regarding disease progression and advance care planning
2. Describe suggested methodology for conducting an advance directive conversation
3. Discuss how effective advance care planning can yield better outcomes within HHVBP "

Bio:
Cindy Campbell is a nationally recognized thought-leader and management consultant to the continuum of healthcare at home. Cindy holds a Master of Health Administration with specialty in Healthcare Informatics, and a Bachelor of Science in Nursing. She brings deep experience leading and guiding others in multi-service line healthcare at home. Cindy and her team help agencies leverage strategic thought

and operational efficiency into organizational, work-process and clinical model design for Home Health, Hospice, Palliative Care and Private Duty organizations throughout the United States.

Katherine Morrison is the Director of Hospice Consulting Operations for WellSky, is an RN and holds a Master of Science in Nursing with a major in Nursing Informatics and a focus on Homeland Security. She has served in advancing levels of hospice leadership within large, multi-site health systems both in the Midwest and on the eastern seaboard and has extensive expertise in regulatory, compliance, and operational issues. As the subject matter expert for WellSky, Ms. Morrison monitors the changing economic and regulatory changes that impact all areas of hospice. She is a passionate advocate for patients and providers of palliative care and hospice. Ms. Morrison holds a certificate in hospice compliance from the National Hospice and Palliative Care Organization and is a Certified Hospice and Palliative Care Nurse (CHPN) and an End-of-Life Nursing Education Consortium (ELNEC) trainer.

TH14 – Defensive Documentation

Time: 10:30-11:45 AM
Audience: HH, Hospice, Private Duty, Therapy
Speakers: David Alfini & Aimee Delaney*, Hinshaw & Culbertson*

Description:
Proper documentation is one of the biggest challenges faced by senior living providers. It impacts care and can have a detrimental impact on risk and liability. This program is designed to highlight common documentation errors and provide tips and guidance for proper documentation and employee training on the documentation.

Objectives:
1. Understand principal areas of exposure for Senior Living Providers in general documentation and employee related reporting
2. Learn best practices for generating appropriate documentation
3. Learn how to train employees on documentation

Bios:
David Alfini provides results-oriented counsel and legal representation to assisted living / residential care facilities (RCFE) and skilled nursing facilities, continuing care retirement communities (CCRC), nursing homes and independent living communities, as well as home health, home care, and hospice agencies. His goal is to help them manage risk and achieve their business objectives, both in and out of the courtroom. David divides his time between Hinshaw's Los Angeles and Chicago offices, representing facilities and aging services companies nationwide, including in California, Illinois, and Indiana.

Additionally, he has been granted admission pro hac vice in over twenty jurisdictions throughout the United States. He has tried numerous cases to verdict in jurisdictions where he is admitted, including California, Illinois, and Indiana. David's clients value his extensive experience and perspective on litigation, mediation, and multi-jurisdictional matters.

Aimee Delaney counsels employers on all aspects of the employment relationship. She is passionate about working with her clients to provide strategic, tailored solutions for their employee-related issues.

Aimee has assisted human resources professionals, managers, and in-house counsel on matters spanning from hire through termination, including:

- leave and disability considerations;
- misclassification issues;
- employee misconduct;
- and other disciplinary matters.

Aimee's traditional labor law practice includes representing management in labor negotiations, grievances and labor arbitrations, and labor board proceedings.

With her extensive experience in the area of labor and employment, Aimee also develops and provides management and employee training programs. Focused on minimizing potential employment liability and ensuring compliance with state and federal laws governing the workplace, the programs cover anti-harassment and anti-discrimination, as well as a variety of other employment law-related topics.

In addition to being a member of Hinshaw's Executive Committee, she was appointed to the firm's Management Committee in 2019. She also served as the leader of Hinshaw's Labor and Employment Practice Group from 2014 to 2019.

A graduate of Loyola University Chicago School of Law, Aimee has been an adjunct professor at her alma mater for more than a decade, where she teaches Employment Law and Labor Law.

TH21 – Hospice Special Focus Program (SFP) & Provisional Period of Enhanced Oversight (PPEO)/VBID - Hospice and Medicare Advantage

Time: 10:30-11:45 AM
Audience: Hospice
Speakers: Melinda Gaboury*, Healthcare Provider Solutions*

Description:
Major scrutiny of the Hospice Benefit is well underway nationwide. This session will review the details of both programs and what Hospices can expect. The Special Focus Program (SFP), will monitor hospices identified as poor performers based on selected quality indicators. Hospices selected for the SFP will be under additional oversight to enable continuous improvement. This required program includes the development and implementation of enforcement remedies for noncompliant hospice programs, as well as procedures for appealing determinations regarding these remedies. These enforcement actions can be imposed instead of, or in addition to, termination of the hospice program's participation from the Medicare program. Through the PPEO, new providers or suppliers are subject to prepayment medical reviews designed to address improper billing practices right out of the gate. This program is for newly certified hospices as well as change of ownership. This is a must attend session.

This session will cover the details of the Value-Based Insurance Design (VBID) Model – Hospice Benefit Component. Medicare Advantage (MA) has long had coverage for home health patients, but there has never been coverage for Hospice under the MA benefit. VBID is a demonstration that began January 1, 2021. There are 13 Medicare Advantage Organizations (MAO) participating in 2024 with 78 benefit packages, down from 2023. In addition to Hospice care there is an expansion of Palliative Care services that will be offered to patients through the MAO. The differences in coverage for an in-network vs. out-of-network provider will be reviewed. CMS requires that MAOs provide beneficiaries with broad access to the complete original Medicare hospice benefit. This session will cover all known aspects of the demonstration and will prepare hospices for the reality that Medicare Advantage is now in the Hospice world.

Bio:
Melinda A. Gaboury is co-founder and Chief Executive Officer of Healthcare Provider Solutions, Inc. (HPS). Melinda Gaboury and Mark Cannon founded the company in April 2001 to provide financial, reimbursement, billing, operational and clinical consulting to the home care and hospice industries.

Melinda A. Gaboury, with more than 30 years in home care, has over 22 years of executive speaking and educating experience, including extensive day to day interaction with home care and hospice professionals. She routinely conducts Home Care and Hospice Reimbursement Workshops and speaks at state association meetings throughout the country. Melinda has profound experience in Medicare PDGM training, billing, collections, case-mix calculations, chart reviews and due diligence. UPIC, RA, ADR & TPE appeals with all Medicare MACs have become the forefront of Melinda's current impact on the industry. She is currently serving as the Chair of the NAHC/HHFMA Advisory Board and Work Group and is currently serving on the Board of Directors for both the Home Care Association of Florida & Tennessee Association for Home Care. Melinda is also the author of the Home Health OASIS Guide to OASIS-E and Home Health Billing Answers, 2023.

Melinda attended Cumberland University in Lebanon, Tennessee and received her Bachelor of Business Administration in Accounting. She began her career in 1991 with a large Tennessee based home care chain as a staff accountant and later joined a national healthcare consulting firm as their Reimbursement Manager.

TH22 – Labor and Employment Legal Year in Review

Time: 10:30-11:45 AM
Audience: HH, Hospice, Private Duty, Therapy
Speakers: Aimee Delaney & David Alfini, *Hinshaw & Culbertson*

Description:
Each year brings new regulation at the local, state and federal level for labor and employment compliance. Employers with operations in Illinois in particular have many new rules to keep up with that impact current policies and procedures. This presentation will provide a comprehensive overview of the updates and changes in the past year.

Objectives:
1. Obtain overview of new state laws expanding employment protections and benefits for employees, including new paid time off requirements, unpaid leave benefits, commuter benefits and more.
2. Obtain overview of new and proposed federal rules and regulations impacting employment liability, including changes to the salary threshold for exempt employees, new rules impacting joint employment and independent contractor status, and more.
3. Learn best practices for compliance

Bios:
Aimee Delaney counsels employers on all aspects of the employment relationship. She is passionate about working with her clients to provide strategic, tailored solutions for their employee-related issues. Aimee has assisted human resources professionals, managers, and in-house counsel on matters spanning from hire through termination, including:

- leave and disability considerations;
- misclassification issues;
- employee misconduct;
- and other disciplinary matters.

Aimee's traditional labor law practice includes representing management in labor negotiations, grievances and labor arbitrations, and labor board proceedings.

With her extensive experience in the area of labor and employment, Aimee also develops and provides management and employee training programs. Focused on minimizing potential employment liability and ensuring compliance with state and federal laws governing the workplace, the programs cover anti-harassment and anti-discrimination, as well as a variety of other employment law-related topics.

In addition to being a member of Hinshaw's Executive Committee, she was appointed to the firm's Management Committee in 2019. She also served as the leader of Hinshaw's Labor and Employment Practice Group from 2014 to 2019.

A graduate of Loyola University Chicago School of Law, Aimee has been an adjunct professor at her alma mater for more than a decade, where she teaches Employment Law and Labor Law.

David Alfini provides results-oriented counsel and legal representation to assisted living / residential care facilities (RCFE) and skilled nursing facilities, continuing care retirement communities (CCRC), nursing homes and independent living communities, as well as home health, home care, and hospice agencies. His goal is to help them manage risk and achieve their business objectives, both in and out of the courtroom. David divides his time between Hinshaw's Los Angeles and Chicago offices, representing facilities and aging services companies nationwide, including in California, Illinois, and Indiana.

Additionally, he has been granted admission pro hac vice in over twenty jurisdictions throughout the United States. He has tried numerous cases to verdict in jurisdictions where he is admitted, including California, Illinois, and Indiana. David's clients value his extensive experience and perspective on litigation, mediation, and multi-jurisdictional matters.

TH23 – High Impact, High Value: Advanced Care Planning - Part 2

Time: 12:00-1:15 PM
Audience: HH, Hospice, Therapy
Speakers: Cindy Campbell and Katherine Morrison*, WellSky*

Description:

Part 2: Advance directive conversations are a crucial aspect of patient-centered care, particularly when one's practice is in a care setting outside of hospice. Too often avoided due to a lack of confidence and competence, or concern about quashing hope, incorporating advance directive conversations into foundational home health practice ensures that patients' preferences are honored, promoting a person-centered decision-making approach to care. This key skill helps advocate and reduce avoidable hospitalization and emergent care, building your teams advocacy tools when patients and their loved ones face the ultimate progression of disease – end of life.

Objectives:
Part 2:

4. Explain the importance of communication regarding disease progression and advance care planning
5. Describe suggested methodology for conducting an advance directive conversation
6. Discuss how effective advance care planning can yield better outcomes within HHVBP "

Bios:
Cindy Campbell is a nationally recognized thought-leader and management consultant to the continuum of healthcare at home. Cindy holds a Master of Health Administration with specialty in Healthcare Informatics, and a Bachelor of Science in Nursing. She brings deep experience leading and guiding others in multi-service line healthcare at home. Cindy and her team help agencies leverage strategic thought and operational efficiency into organizational, work-process and clinical model design for Home Health, Hospice, Palliative Care and Private Duty organizations throughout the United States.

Katherine Morrison is the Director of Hospice Consulting Operations for WellSky, is an RN and holds a Master of Science in Nursing with a major in Nursing Informatics and a focus on Homeland Security. She has served in advancing levels of hospice leadership within large, multi-site health systems both in the Midwest and on the eastern seaboard and has extensive expertise in regulatory, compliance, and operational issues. As the subject matter expert for WellSky, Ms. Morrison monitors the changing economic and regulatory changes that impact all areas of hospice. She is a passionate advocate for patients and providers of palliative care and hospice. Ms. Morrison holds a certificate in hospice compliance from the National Hospice and Palliative Care Organization and is a Certified Hospice and Palliative Care Nurse (CHPN) and an End-of-Life Nursing Education Consortium (ELNEC) trainer.

<u>TH24 – MCO Panel</u>

Time: 12:00-1:15 PM
Audience: HH, Hospice
Speakers: Various MCO Representatives

Description:
This panel presentation will include representatives from all of the Managed Care Plans in Illinois. Each will cover building their networks which will include establishing contracts; prior authorization processes; claims and billing; and quick reference guides of who to contact when issues arise.

Objectives

1. Understand how to enter into a contract with a managed care plan.

2. Identify the differences in prior authorization processes from plan to plan.
3. Understand the claims and billing processes for each plan.