

INDIANA PRIMARY HEALTH CARE ASSOCIATION

2011 CONNECTIONS

ANNUAL CONFERENCE

SPONSORED BY:



# WELCOME

It's that time of year again – time to register for IPHCA's Annual Conference! The 2011 Annual Conference Committee has been working hard to put together an event that will provide you with two days filled with exceptional education sessions, plenty of fun, and some excellent awards and giveaways!

We hope that you will register today for IPHCA's 2011 Annual Conference. We look forward to seeing you there!

Stephanie Suddeth,  
Member Services Specialist

Carla Chance,  
Director of CHC Services

## Hotel Information

IPHCA has negotiated a special discounted rate for conference attendees at our host hotel located at Keystone at the Crossing. Guest rooms are \$122 plus tax per night, which includes internet. You must make your reservations by October 01, 2011 in order to get the discounted rate. Be sure to mention the room block name: Indiana Primary Health Care Association Annual Conference. Space is limited. Please check with the hotel for complete reservation and cancellation rules. Call 1-800-228-9290 toll-free and make your reservation today!

## Planning Committee

TJ Warren	Vermillion Parke Community Health Center
Beth Wrobel	HealthLinc
Sally Watlington	Riggs Community Health Center
Stacy Carrell	Riggs Community Health Center
Dollye Carlisle	Neighborhood Health Clinics

# AGENDA AT A GLANCE

## Tracks:

**T1:** Administrative - Practice managers, office managers, HR staff, and CEOs

**T2:** Financial - CFOs and Financial staff

**T3:** Clinical/Medical Director - Medical Directors, Quality Personnel, and Clinical staff

**T4:** Board of Directors - CHC Board Members

**T5:** Behavioral Health Integration - CMHC and CHC staff responsible for integration of primary care and behavioral health care, and health centers interested in knowing what integration entails.

## Monday, October 17, 2011

7:30 am	Registration and Exhibit Hall Open – Breakfast open
8:00 am – 8:15 am	Tentative: Senator Lugar Award
8:15 am – 8:40 am	Breakfast
8:40 am – 9:00 am	Welcome – Phil Morpew, IPHCA CEO
9:00 am – 9:15 am	Sponsor Presentation – McKesson Medical
9:15 am – 10:15 am	Opening Keynote – Sam Glenn
10:15 am – 10:30 am	Vendor/Networking Time
10:30 am – Noon	Concurrent Sessions I T1: Hiring J-1 & H-1B Physicians: A survival guide, Michael Kim, Hall Render T2: The Business of Community Health, Mike Holton, RSM McGladdery T3: Cancer Resources and Tools, Tom Rich, American Cancer Society T4: Board Responsibilities 101, Iris Sewell, The Sewell Group T5: Affiliation Agreements for Integration of PC and BH Care, Tom Ruge
Noon – 12:15 pm	Vendor/Networking Time
12:15 pm – 1:00 pm	Lunch
1:00 pm – 1:15 pm	Keynote Sponsor Presentation
1:15 pm – 2:15 pm	Lunch Keynote – Legislative Panel
2:15 pm – 2:30 pm	Vendor/Networking Time
2:30 pm – 4:00 pm	Concurrent Sessions II T1: Employee Relations for Managers: 12 Tips for Avoiding Liability, David Gray, Lewis & Kappes T2: Improving Health Center Operations (Part 1), Mike Holton T3: Quality Data Reporting: Generating the Data You Need to Participate in Incentive Programs, Don Gettinger, Health Care Excel T4: Board/CEO Relations – Succession Planning and Beyond, Iris Sewell T5: MCE/OMPP Panel on Integration of Primary Care and Behavioral Health Care, MHS, MDWise, Anthem, and OMPP
4:00 pm – 5:00 pm	IPHCA Annual Business Meeting (Porter Room)
4:00 pm – 5:00 pm	Roundtable Discussions
5:00 pm	Exhibit Hall Closed
5:00 pm	End of First Day
5:00 pm – 7:00 pm	Hosted Reception

## Tuesday, October 18, 2011

7:00 am – 7:45 am	IPHCA BOD Meeting
7:30 am	Registration and Exhibit Hall Open – Breakfast open
8:00 am – 8:30 am	Breakfast
8:30 am – 9:00 am	Keynote, Margaret Davis, HRSA
9:00 am – 9:15 am	Vendor/Networking Break
9:15 am – 10:45 am	Concurrent Sessions I T1: Developing Community Partnerships, Jackie Leifer T2: Improving Health Center Operations (Part 2), Mike Holton T3: What's New with Quality Initiatives among the Managed Care Entities T4: Health Center Economics 101, Dan Gaafar, Bradley & Associates T5: Moving from Co-location to Full Integration, Cherokee Health Systems
10:45 am – 11:00 am	Vendor/Networking Break
11:00 am – 12:30 pm	Concurrent Sessions II T1: CLIA Guidelines, Kathy Nucifora and James Liggins, COLA T2: Preparing the Health Center Financially for 2014 in 2011, Mike Holton T3: Leadership by Design, Bob Urso & Dr. Luning T4: 5 Situations Board Members should Know How to Handle, Tom Ruge T5: Tele-Mental Health Services, Cherokee Health Systems
12:30 pm – 12:45pm	Vendor/Networking Time
12:45 pm – 1:15 pm	Lunch
1:15 pm – 2:00 pm	Keynote Speaker – Dr. Howell
2:00 pm – 3:30 pm	Concurrent Sessions III T1: Workflow and Productivity, Jeff Daner, Midmark T2: Managing Finances in Tough Times, Mike Holton T3: Evaluating Medical Staff Practice Patterns, Panel Discussion led by Dr. Wernert T4: The Board's Role in Building Community Partnerships, Jackie Leifer T5: Working Effectively within the Primary Care Setting, Cherokee Health Systems
3:30 pm – 4:30 pm	Awards Ceremony
4:30 pm	Conference Ends



# MONDAY 2:30PM – 4:00 PM

## T1 Employee Relations for Managers: 12 Tips for Avoiding Liability

Presenter: David Gray, Lewis & Kappes

Who should attend: Practice Managers, Office Managers, Supervisors, and CEOs

In this session, attendees will learn from attorneys, who have handled numerous employment matters for health centers, the keys to avoiding or limiting exposure to claims by current and former employees against your health center. This session will cover things like disciplining employees, documentation, termination, FMLA, and many more areas that can get a center in trouble.

## T2 Improving Health Center Operations (Part 1)

Presenter: Mike Holton, RSM McGladdery

Who should attend: CFOs and Financial staff

Efficient health centers are driven by a team approach to understanding the financial and operational goals of the health center, and how processes are managed. Attend this session to learn about approaches to assessing operations and some best practices that get results. Participants will learn about key data that can measure improvements in efficiencies, hear about ideas and processes to equip executives with tools for managing operations, and understand formulas for operational success and the importance of identifying workflows.

## T3 Quality Data Reporting: Generating the Data You Need to Participate in Incentive Programs

Presenter: Don Gettinger, CPHIT/CPEHR, Health Information Technologist, Health Care Excel

Who should attend: Medical Directors, Quality Personnel, and Clinical staff

There are many opportunities to participate in federal, state, and local incentive programs that require providers to report clinical quality data. These programs include the CMS Electronic Health Record incentive program, Physician Quality Reporting System, the e-Prescribing incentive program, and other local programs. This presentation will provide an overview of the incentive programs available; outline data measures for each incentive program; provide tips on generating accurate data reports; and provide information on available assistance with data measure reporting and quality improvement. Health care providers and administrators will learn how to earn incentive payments while participating in a statewide effort to improve the quality of preventive health care.

## T4 Board/CEO Relations – Succession Planning and Beyond

Presenter: Iris Sewell, The Sewell Group

Who should attend: CHC Board Members

This session will address the unique nature of the oversight requirements associated with the role of the Board of a health center as compared to the governance responsibilities of other nonprofit boards of directors. Issues to be covered in this session will include the unique partnership between the CEO and the Board and the CEO and the Board Chair. The session will also address the CEO evaluation process, the Board self-evaluation process and succession planning within the organization.

## T5 MCE/OMPP Panel on Integration of Primary Care and Behavioral Health Care

Presenter: MCEs and OMPP

Who should attend: CMHC and CHC staff responsible for integration of primary care and behavioral health care, and health centers interested in knowing what integration entails.

This session will be a panel discussion with representatives from Managed Health Services, MDWise, Anthem, and OMPP to discuss their vision for integrated primary and behavioral health care, steps they have or may take to accomplish integrated care, and payment barriers associated with integration.

## TUESDAY 9:15AM – 10:45AM

### T1 Community Partnerships

Presenter: Jackie Leifer, Feldsman Tucker

Who should attend: Practice Managers, Office Managers, Supervisors, and CEOs

Developing community partnerships requires extensive coordination, shared knowledge, open and clear lines of communication, the commitment of both parties, and the establishment of a shared vision. This training session will provide health center CEOs with a road map for establishing a planning process and identifying, evaluating, and implementing a successful partnership model.

The training session will provide an overview of a range of collaboration options that health centers can pursue with community partners including hospitals, primary care practices, community mental health centers, and universities. The collaboration options we will discuss include the following:

- Referral agreements
- Arrangements for the “co-location” of clinicians in each partner’s site
- Lease of personnel and services
- Transfer of primary care practices or clinics to the health center
- Formation of new entities
- Emergency room care coordination
- Medical school residency program collaborations

### T2 Improving Health Center Operations (Part 2)

Presenter: Mike Holton, RSM McGladdery

Who should attend: CFOs and Financial staff

Attend this session to learn about communicating productivity needs to board members, providers and other staff. Hear about the impact of productivity on the health center’s overall financial health, the benefits to patients and advantages for staff. How do we determine the level of business volume needed at our health center in order to accomplish all strategic and annual goals and objectives? This session will focus on identifying how to arrive at productivity goals for each provider and reports that analyze progress, and how senior leadership should take action based on goals status. Participants will learn about data collection that will aid in establishing decision-making needed to improve provider productivity, know how to determine the level of visits needed to plan for financial success, understand the steps for implementing a model for improving provider and staff productivity.

### T3 What's New with Quality Initiatives among the Managed Care Entities

Presenter: MCEs

Who should attend: Medical Directors, Quality Personnel, and Clinical staff

The MCEs will present a joint focus on understanding the Indiana Medicaid programs and the complexity of the structure. The MCEs will continue with a joint focus on HEDIS/quality measures as they relate to primary care providers (Pediatricians, Family Practice, Internal Medicine, General Practice, and OB/GYNS). The material will familiarize providers with the 3 well child HEDIS performance measures, 0-15 months of life, 3-6 years of life, Adolescent Well Care, ages 12-21, detailing documentation guidelines, specified requirements, timeframes, and billing guidelines. In addition, the session will include how these measures are collected, analyzed, and presented to provider offices. The MCE's will also familiarize providers with the requirements of the EPSDT program and how they relate to the well child measures, introducing the adoption of the Bright Futures Guidelines for Health Supervision of Infants, Children, and Adolescents between the MCEs and the American Academy of Pediatrics (AAP). Providers will increase their understanding of performance measurement and how it relates to P4P initiatives. Providers will receive tools and resources in this session to help promote increased quality performance

### T4 Health Center Economics 101

Presenter: Dan Gaafar, Bradley & Associates

Who should attend: CHC Board Members

This session will go over the economics of a health center for board members, including the different types of payments, timing of payments, the PPS rate, Medicaid reimbursement, and more. Board members will learn how the different payment types and the timing of those payments can affect the center's bottom line from month to month.

### T5 Moving from Co-location to Full Integration

Presenter: Cherokee Health Systems

Who should attend: CMHC and CHC staff responsible for integration of primary care and behavioral health care, and health centers interested in knowing what integration entails.

## TUESDAY 11:00 AM – 12:30 PM

### T1 CLIA Guidelines

Presenter: Kathy Nucifora and James Liggins, COLA

Who should attend: Practice Managers, Office Managers, Supervisors, and CEOs

Attendees will learn how to evaluate the laboratory testing that best serves their patients and the requirements needed to complete a Quality Assurance Plan. In addition, the following will be reviewed: how to perform Quality Control testing, the CMS guidelines for creating a CLIA Manual specific to your CLIA license, the waived testing and Provider Performed Microscopic Procedures (PPMP). Each attendee will leave the session with the forms for logging quality controls, competency testing, temperate tracking, and a CMS-116 application.

## T2 Preparing the Health Center Financially for 2014 in 2011

Presenter: Mike Holton, RSM McGladdery

Who should attend: CFOs and Financial staff

Now that health care reform has become law, what do community health centers (CHCs) need to do and what can they expect? This session will discuss areas of the health reform statute and things health centers need to consider in preparing for significant change. For example, how could health reform change our payer mix, or competitive environment or challenge our mission of serving the uninsured. The session will also address operational changes that may be required. Participants will understand the impact of health care reform on the communities they serve, be able to identify new regulatory requirements that are part of health care reform and the CHC financial and operational responses to those requirements, and evaluate their role in serving the uninsured and newly insured.

## T3 Leadership By Design

Presenter: MCEs

Who should attend: Medical Directors, Quality Personnel, and Clinical staff

Community health center governance is successful if there is good communication starting with the Chief Executive Officer and Medical Director. This session is designed to be interactive discussion between CEO and Medical Director with participation from the audience. Topics to be covered include: organizational structure, strategic planning, new program evaluation/planning and how good communication within the leadership team enhances the organization.

## T4 5 Situations Board Members should Know How to Handle

Presenter: Suzanne Gaidoo, Lewis & Kappes

Who should attend: CHC Board Members

Health center board members often confront difficult issues including, but not limited to, conflicts of interest, communications with the CEO, political activities, disruptive board members, and other "touchy" situations. This interactive session will address methods for dealing with awkward and sensitive matters encountered by health centers boards of directors.

## T5 Tele-Mental Health Services

Presenter: Cherokee Health Systems

Who should attend: CMHC and CHC staff responsible for integration of primary care and behavioral health care, and health centers interested in knowing what integration entails.

# TUESDAY 2:00 PM – 3:30 PM

## T1 Workflow and Productivity

Presenter: Jeff Daner, Midmark

Who should attend: Practice Managers, Office Managers, Supervisors, and CEOs

## T2 Managing Finances in Tough Times

Presenter: Mike Holton, RSM McGladdery

Who should attend: CFOs and Financial staff

We may never know what tomorrow will bring in terms of federal or state funding reductions, loss of revenue streams through changes in payor mix or non-renewal of contracts, natural disasters, or some other catastrophe that could cause our health centers to experience serious financial difficulties. Learn in this session some ideas for budgeting that includes “what if” analyses, strategies for improving operations NOW to generate cash reserves and managing dollars during difficult times. Learn the importance of analyzing the right types of information in order to know when quick action is needed to avert operational problems. Participants will be able to plan for times when finances are difficult to manage, know what to do when business volume or revenue streams are reduced, and understand how to analyze the right types of information to avoid problems.

## T3 Evaluating Medical Staff Practice Patterns

Presenter: Panel discussion led by Dr. Wernert

Evaluating a person’s performance can be a challenge, especially when they are considered a peer. John Wernert, MD, MHA, President of Professional Development Associates, LLC will examine the issues that may need to be addressed when evaluating doctors and other providers. A panel of community health centers’ medical directors will share their experience and insight on how they have addressed practice patterns.

## T4 Community Partnerships

Presenter: Jackie Leifer, Feldsman Tucker

Who should attend: Practice Managers, Office Managers, Supervisors, and CEOs

Health center Boards of Directors play a unique role in evaluating whether and how a health center should partner with hospitals, behavioral health providers, teaching institutions, and other community providers and agencies. Regardless of whether the proposal for partnership emanates from the management team’s response to Board approved priorities or from a third party, Board involvement in evaluating partnership opportunities is critical.

As the “voice” of the community, it is important for a health center Board to review a proposed partnership from the perspective of whether it is consistent with the health center’s mission and strategic goals and, most importantly, whether it will benefit the community served by the health center. In addition to being involved in the evaluation process, the health center Board should be consulted regularly during the planning process, the due diligence reviews, and the development of definitive agreements so as to assure that when final Board approval is sought, the Board is well informed and supportive of the initiative.

This training will highlight the benefits of collaborating with other providers and the various collaborative models, and will provide participants with concrete tips to ensure that they are actively and appropriately involved throughout the community partnership planning process.

## T5 Working Effectively within the Primary Care Setting

Presenter: Cherokee Health Systems

Who should attend: CMHC and CHC staff responsible for integration of primary care and behavioral health care, and health centers interested in knowing what integration entails.

# TO REGISTER

Please use this online form to register each attendee. IPHCA must receive payment prior to the training. There will be no refunds, but you may substitute attendees. All substitutions must be received in writing. **The registration fee is listed below** and includes breakfast (both days), lunch (both days), breaks, the reception and all conference materials.

## Registration Fees

When you register 5 attendees, the sixth one is free!

Registration Type	Thru Oct. 7	After Oct. 7
<b>Member</b>		
Per person	\$235	\$285
<b>Non-Member</b>		
FQHC/RHC/CHC/CMHC	\$285	\$335
Other	\$315	\$365

## Location and Hotel Reservations

### Indianapolis Marriott North at Keystone at the Crossing

3645 River Crossing Parkway  
Indianapolis, IN

**Special rate:** \$122 plus tax/night

**Reservation Number:** 800-228-9290

Make sure to call the Marriott by October 01 to reserve a room at the group rate. Mention you are with the Indiana Primary Health Care Association Annual Conference. After this date, rooms can only be reserved based on availability.

# ATTENDEE INFORMATION

First Name \_\_\_\_\_ Last Name \_\_\_\_\_

Nickname on Badge \_\_\_\_\_ Title \_\_\_\_\_

Organization \_\_\_\_\_

Street Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Email \_\_\_\_\_ Phone \_\_\_\_\_

Vegetarian Meal Requested            Yes            No

Require Special Assistance            Yes            No

First Time Attending Conference    Yes            No

Payment Amount \_\_\_\_\_ Payment Type \_\_\_\_\_ Check (enclosed) \_\_\_\_\_ Visa    MC

Credit Card Number \_\_\_\_\_ Expiration Date \_\_\_\_\_

Signature of Card Holder

\_\_\_\_\_

Please send form to: Stephanie Suddeth, IPHCA, 429 N. Pennsylvania Street, Suite 333, Indianapolis, IN 46204 or fax to 317-630-0849 or email to [ssuddeth@indianapca.org](mailto:ssuddeth@indianapca.org). For any questions regarding the training, please contact Stephanie at 317-630-0845.

Please note there will be no refunds, however, substitutions are allowed.