FINANCE & REIMBURSEMENT OFFICERS

"It's not just for Finance and Reimbursement anymore!"

NC FARO
2007 SPRING CONFERENCE

REGISTRATION
AGENDA

APRIL 29 – May 2, 2007

WILMINGTON HILTON
301 N. Water Street
Wilmington, NC
Phone: 910-763-5900

NC FARO SPRING 2007 CONFERENCE
April 29 – May 2, 2007
Wilmington Hilton, Wilmington NC

CONFERENCE INFORMATION:

Important Registration Info: **Payment must be received with completed registration form**. **Individuals will not be registered for conference until payment is made.**

Please be sure to include (***please print clearly***) your email address on registration form so confirmation can be made (Note: All confirmations will be made by email – **no** postal mailings will be made**)**. **If you think you are registered but have not received a confirmation by email, contact Alice Matthews at abmcms@aol.com.** Otherwise***, if payment has not been received (regardless that you think it is in the mail), you will be required to pay registration fee upon arrival at conference***.

Walk-ins are welcome with payment in hand only. Note: Banquet Tickets are **NOT** available for walk-ins (hotel requires FARO to give notification prior to conference on the number to be in attendance).

Cancellation Policy: Registration fees are fully refundable if request is received before April 10, 2007. April 11-18, 2007, refunds less a 50% cancellation fee will be honored at your request. No refund requests will be accepted after 5:00 p.m. beginning April 18, 2007. To discuss a cancellation, call Alice Matthews at 910-488-5170 (phone) or by e-mail at abmcms@aol.com.

Hotel Information: The NC FARO Spring 2007 Conference will be held at the Wilmington Hilton, 301 N. Water Street, Wilmington, NC 28401. Phone 910-763-5900 for reservations. **FIRST COME, FIRST RESERVED**! 250 rooms are blocked at a rate of $102 plus tax per night for standard rooms. Guaranteed riverfront rooms are subject to $10.00 additional charge per room. **Reservation cut-off date is March 28, 2007 or until all 250 rooms have been reserved, whichever comes first**. Be sure to mention that you are with NC FARO to obtain this rate. All reservations must be accompanied by a first night room deposit or guaranteed with a major credit card. Hotel check-in time is 4:00 p.m. Checkout time is 11:00 a.m. Parking fees (for NC FARO Conference only) are as follows (not included in room rate). Make sure you get a parking decal from hotel at check-in.

Overnight Guests	$ 4.00/Day
Daily Attendees	$ 5.00/Day
Valet Parking	$ 12.00/Day

Parking Information: **If you are not staying at the hotel and are parking in paid lot across from the hotel, check with FARO's registration desk for a receipt so that you can file for reimbursement from your agency.**

NOTE: **Conference room temperatures vary. Please wear layered clothing to ensure your personal comfort**.

Contact Information: If you need further information on the conference, please contact the following:

Hotel/reservation questions contact: Cathy Macemore, Cathy.Macemore@ncmail.net, 336-874-2798
Exhibitor/Vendor questions contact: Pat Myers, pat_myers@ocbhs.org, 910-219-8003
Membership questions contact: Debbie Barnett, dbarnett@eastpointe.net, 910-275-7135
Conference Registration questions contact: Alice Matthews, abmcms@aol.com, 910-488-5170
Provider questions contact: Gayle Mahl, gmahl@pathmhddsa.org, 704-842-6349

Additional Information: Should you need additional registration information, forms, or agenda, they are available on our website at www.ncfaro.org. You may also make copies of the registration packets for use by others in your agency as well as providers with whom you contract. All updates concerning the conference (i.e, agenda changes, weather) will also be posted on our website.

Banquet Information: If you are registering for full conference, please indicate if you **WILL** be attending the Banquet by marking the "I Will Attend" box on the Registration Form (hotel requires advanced notification on banquet attendance prior to conference). If you do **NOT** plan to attend the banquet mark the "I Will **Not** Attend" box. Additional banquet tickets may be purchased for $30.00 each (you must register and pay in advance). A check for $30.00 must be enclosed with registration for each additional ticket. Banquet tickets that are not requested in advance will not be available at the conference. To attend banquet with a one-day registration, you will need to enclose the additional $30 to receive a banquet ticket. No Banquet Tickets available for walk-ins.

Banquet Buffet Menu: Garden Salad, Watermelon Fruit Basket, Peel & Eat Shrimp Stack, Baked Rolls, Southern Fried Chicken, Teriyaki Beef Tenderloin Tips, Hot Baked Vegetarian Ziti, Seasoned Potato Wedges, Steamed Vegetable Medley, Macaroni & Cheese, Assorted Desserts, Ice Tea, Coffee and Water.

Directions to Hotel: Refer to pages 14-15 for detailed directions to hotel.

IMPORTANT NOTE TO ALL IN ATTENDANCE: NO audio or videotaping of sessions without written permission from speaker and prior approval of NC FARO Executive Committee.

NORTH CAROLINA FINANCE, REIMBURSEMENT AND MIS OFFICER'S (NC FARO) SPRING 2007 CONFERENCE

WILMINGTON HILTON
WILMINGTON, NC
APRIL 29 – May 2, 2007

SUNDAY, APRIL 29, 2007

5:00 – 7:00 P.M. ***EARLY REGISTRATION*** *– Lower Lobby (Boardroom A)*

9:00 – 11:30 P.M. ***HOSPITALITY SUITE*** *– Rooms 701-707, Exhibitor / Vendor Sponsored Event*
"Visit with friends and meet new FARO participants"

MONDAY, APRIL 30, 2007

7:00 – 7:55 A.M. ***CONTINENTAL BREAKFAST*** *– Azalea Room*
Exhibitor / Vendor Sponsored Event

7:15 – 8:15 A.M. ***REGISTRATION*** *– Lower Lobby (Boardroom A)*

8:15 – 9:00 A.M. ***WELCOME*** *– Magnolia / Dogwood*
Beth Brown, Pathways
2007 NC FARO President

VENDOR INTRODUCTIONS

9:00 – 10:15 A.M. – BREAKOUT SESSIONS
(Choice of 3 Breakout Sessions)

Track 1

SESSION*:* ***New Issues in Compliance for Reimbursement Officers***

SPEAKER: *Mary Thornton, BSRN, MBA, Mary Thornton & Associates*

DESCRIPTION*: This all day workshop will cover three primary areas. First, an update on compliance issues in behavioral health and their potential impact on reimbursement and the reimbursement function. Part II will be an update on the revenue cycle and how healthcare organizations manage this cycle to improve revenue and cash flow. And finally, using the Revenue Cycle as a compliance tool which will look at the policy and procedure organizations need in order to make sure that their revenue cycle is managing within an acceptable risk zone and that significant compliance issues are being addressed.*

Track 2

SESSION*:* ***Record Retention: Managing Records Responsibly within an Evolving System***

SPEAKERS*:* *Curtis Martin, Accountability Specialist, DMH/DDSAS Accountability Team Policy Unit*
Rebecca McGee-Lankford, State Records Center, Archives and History, Dept. of Cultural Resources
Don McLamb, Audit Resolution Coordinator for Governmental Audits, DHHS Controller's Office

DESCRIPTION*: This session will address issues and policies related to records retention and disposition requirements for LMEs and providers. The Records Retention and Disposition Schedule for State and Area Facilities, retention time periods, disposition issues, scanning records, and electronic records systems will be discussed. The presenters will also outline the process for the current effort to revise records retention requirements for providers and LMEs. Both Division of MH/DD/SAS and Department of Cultural Resources staff will present information during this session. This session is recommended for records officers, staff with records management responsibilities, HIPAA officers, LME and provider executive leadership, LME and provider managers, information systems staff and managers.*

Track 3

SESSION: ***<u>Customer Service and Communications</u>***

SPEAKER: *R. Nelson Connor, Customer Service & Communications, Pathways MH/DD/SAS*

<u>DESCRIPTION</u>*:* *An LME Director of Customer Service discusses the roles of customer service and communications in building relationships with consumers in the NC MH/DD/SAS system.*

10:15 – 10:45 A.M. *BREAK: EXHIBITOR / VENDOR VISITATION – Azalea Room*

10:45 – 12:00 P.M. – BREAKOUT SESSIONS
(Choice of 5 Breakout Sessions)

Track 1

SESSION*:* ***<u>The Revenue Cycle</u>***

SPEAKER*:* *Mary Thornton, BSRN, MBA, Mary Thornton & Associates*

<u>DESCRIPTION</u>*:* *A continuation session. Refer to previous description.*

Track 2

SESSION: ***<u>DMA Update</u>***

SPEAKER: *Marcia Copeland, Chief of Behavioral Health, Division of Medical Assistance*

<u>DESCRIPTION</u>: *This session will provide the audience an update of current issues with DMA; discussion will identify upcoming policy direction, current trends in implementation of current policies, "touch on the focused reviews", and any system issues to identify problems and or upcoming changes.*

Track 3

SESSION*:* ***<u>Public Reports used to Improve LME Decision Making</u>***

SPEAKERS*:* *Thomas Palombo, Social/Clinical Research Specialist, DHHS, Division of MH/DD/SA*
Shealy Thompson, Quality Management Team Leader, DHHS, Division of MH/DD/SA

<u>DESCRIPTION</u>*:* *The DSIS (Decision Support Information System) allows the user to view via the web aggregated information on Annual, Quarterly and/or Ad-Hoc reports normally generated by the Information Systems Services Department of the State. This session will address ease of availability, detailed flow explanation of design, and relative usage. Topics will include reports from Consumer Satisfaction Survey, Local Management Entity extracts to the Client Data Warehouse (CDW), and Treatment Outcomes and Program Performance Systems (TOPPS).*

Track 4

SESSION: ***<u>NC Practice Improvement Collaborative</u>***

SPEAKERS*:* *Michael Lancaster, M.D., Chief of Clinical Policy Management, Division of MH/DD/SAS*
Mary E. Powell, MHA, Associate Executive Director, Governor's Institute on Alcohol & Substance Abuse, Inc.
Flo Stein, Chief of Community Policy Management Section, Division of MH/DD/SAS

<u>DESCRIPTION</u>*:* *Evidenced-based practices are those clinical services, supports and administrative practices that have been proven to consistently produce specific intended results. To provide guidance in determining the future evidence-based services and supports that will be supported through public funds, the Division of Mental Health, Developmental Disabilities and Substance Abuse Services created the North Carolina Practice Improvement Collaborative (NCPIC). This advisory group meets regularly with researchers and service model developers to evaluate new programs. To date, the NCPIC has reviewed several model programs and systems of supports. This session will highlight these practices and discuss the role of the purchaser in the selecting and implementing these programs.*

Track 5

SESSION: ***Developing Outcome and Performance Measurements***

***SPEAKER**:* *Nikki Migas, M.P.A. Managing Director*
CARF Behavioral Health and Child & Youth Services

***DESCRIPTION**:* *Provide an overview of outcomes concepts and techniques as a tool to drive program decisions and improve practice. Demonstrate how to set up and use a framework for evaluating your program's performance. Apply the skills learned to a quality improvement example from your own setting.*

12:00 – 1:30 P.M. *LUNCH ON YOUR OWN*

1:30 – 2:30 P.M. – BREAKOUT SESSIONS
(Choice of 6 Breakout Sessions)

Track 1

SESSION**:* ***Using the Revenue Cycle as a Compliance Tool

***SPEAKER**:* *Mary Thornton, BSRN, MBA, Mary Thornton & Associates*

***DESCRIPTION**:* *A continuation session. Refer to previous description.*

Track 2

SESSION: ***IT Investment Strategies***

SPEAKER: *Shannon H. Schelin, Director of Center for Public Technology*
University of North Carolina's School of Government

***DESCRIPTION**:* *Public sector CIOs and IT directors are facing increasing challenges and responsibilities in the era of new governance. As the lines between traditional functional services and departments begin to blur, the IT leadership is charged with 1) managing the constantly expanding role for IT within your government, 2) protecting your government against ever-increasing security threats, and 3) keeping up with the feverish pace of new technology. The IT Investment Strategies session will lay the foundation for assessing and addressing some of the most critical issues facing IT leadership in local government. The purpose of this session is to equip technologists with the requisite tools to garner, manage, and improve their organizational technology assets.*

Track 3

SESSION**:* ***Reconciling Differences between HIPAA and State Confidentiality Law – Part I

***SPEAKER**:* *Mark F. Botts, J.D., Associate Professor of Public Law and Government, School of Government*
The University of North Carolina at Chapel Hill

***DESCRIPTION**:* *This session will address provisions in the state MH/DD/SA confidentiality law and HIPAA that place conflicting obligations or standards on providers that are not easily reconciled. Topics will include the client's right of access to information, the client's authorization to use and disclose information, and disclosing information when a client presents a threat of harm to another person. In addition to working through how to resolve the conflicts in these and other confidentiality provisions, participants will be provided with the tools for resolving all areas of conflict between HIPAA and state confidentiality law.*

Track 4

SESSION: ***The MH/DD/SA Service Records Manual – What's New and How Did We Get Here?***

SPEAKERS: *Nancy Law Rogers, Policy Unit Staff of the Accountability Team, Division of MH/DD/SAS*
Curtis Martin, Accountability Specialist, Division of MH/DD/SAS

DESCRIPTION: *Staff will provide a PowerPoint presentation, offering a broad overview of the revised Service Records Manual. The target audience will be a combination of finance, medical records, and reimbursement staff of the LMEs and community service providers. Topics covered will include the scope, design, and intended use of the manual, concentrating primarily on the changes and additions that have been made in direct response to MH/DD/SA systems reform and transformation. The overall intent of this presentation is to give attendees a sense of the manner in which the manual has evolved into its somewhat modified structure.*

Track 5

SESSION: ***Internal Accounting Controls – A Refresher***

SPEAKER: *H. Wayne Terry, CPA, Larson Allen Weishair & Co., LLP*
C. Cline Comer, CPA, Larson Allen Weishair & Co., LLP

DESCRIPTION: *This session is to refresh the knowledge of experienced financial officers as well as to bring both new financial officers and non-financial managers/owners of providers up to date as to the necessity of internal accounting controls in their operating environment. The session will provide some examples of problem areas that are being noted in monitoring reviews and external audits.*

Track 6

SESSION: ***Personal Safety – Make it Personal to You!***

SPEAKER: *Amy Hawkins, Gastonia Police Officer, Gastonia City Police Department*

DESCRIPTION: *This class is a personal safety talk for anyone who would like to feel a little safer and more confident about themselves in dangerous situations. This is a* ***hands-off*** *class and does not require special clothing or equipment. Come learn and enjoy!*

2:30 – 3:00 P.M. *BREAK: EXHIBITOR / VENDOR VISITATION – Azalea Room*

3:00 – 4:30 P.M. – BREAKOUT SESSIONS
(Choice Of 6 Breakout Sessions)

Track 1

SESSION: ***Using the Revenue Cycle as a Compliance Tool, continued***

SPEAKER: *Mary Thornton, BSRN, MBA, Mary Thornton & Associates*

DESCRIPTION: *A continuation session. Refer to previous description.*

Track 2

SESSION: ***Cultural and Linguistic Competency***

SPEAKER: *Michelle J. Edelen, MBA, Communications and Training Team Leader*
Division of MH/DD/SAS

DESCRIPTION: *The journey towards developing cultural competence within the public mental health, developmental disabilities and substance abuse service system is a dynamic and evolutionary process. The fundamental precepts of cultural competence include developing respect for differences, cultivating successful approaches to diversity, increasing awareness of one's self and of unstated institutional cultural norms and practices and working knowledge of the history, culture, beliefs, values and needs of diverse consumers and communities. This presentation will introduce the participants to the Division's Action Plan and recommendations to build a culturally competent system.*

Track 3

SESSION: ***Wireless: The Wave of the Future?***

SPEAKER: *Shannon H. Schelin, Director of Center for Public Technology*
University of North Carolina's School of Government

DESCRIPTION: *Wireless technologies have emerged with a vengeance in the past five years. The public sector is using wireless capabilities to enhance efficiency, effectiveness, and service delivery. This session will explore the variety of available wireless options, examine the risks and benefits associated with such endeavors, and highlight some emerging trends from the wireless world. In addition, we will highlight real-world examples of wireless solutions that may be transferable to your organization.*

Track 4

SESSION: ***Navigating the P & C Website***

SPEAKERS: *Tony Vinogradov, NC E-procurement/Education Outreach Section, Division of Purchase & Contract*
Sondra Phillips, NC E-procurement/Education Outreach Section, Division of Purchase & Contract

DESCRIPTION: *Take a tour of the P & C website and get linked to all the great purchasing resources that are available to you with just a click or two of your mouse. This session is best suited for organizations governed by the State of NC Procurement Policies and Procedures.*

Track 5

SESSION: ***Subrecipient Monitoring 101: The LME's Responsibility for Monitoring Compliance with the Major State and Federal Programs that are Subcontracted Out***

SPEAKERS: *Don McLamb, Audit Resolution Coordinator for Governmental Audits, DHHS Controller's Officer*
Mary Tripp, Policy Unit Leader, DMH/DD/SAS Accountability Team
Pei Chi Wu, Research Statistical Analyst, DMH/DD/SAS Accountability Team Policy Unit

DESCRIPTION: *Traditionally, the area programs operated and administered the block grant programs and other programs funded with federal or state financial assistance dollars, however, with the divestiture of services, most of these programs are operated by non-profits with which the LME contracts to carry out the program (e.g., SAPTBG requirements, MAJORS, Safe and Drug-Free Schools, PATH). This workshop will inform participants about the LME's role for monitoring subcontractors according to the requirements of OMB Circular A-133 and NC GS § 143-6.2. This workshop is designed for contract officers, finance office staff and program/grant administrators at both the LME and the subgrantee levels.*

Track 6

SESSION: ***Self Defense***

SPEAKER: *Amy Hawkins, Gastonia Police Officer, Gastonia City Police Department*

DESCRIPTION: *This class is a self defense **hands on** class for anyone who would like to feel a little safer and more confident about themselves in dangerous situations. Comfortable clothes should be worn for this class. Come learn and enjoy!*

4:30 – 5:30 P.M. – NETWORKING SESSIONS
(Choice of 5 Networking Sessions)

Track 1

SESSION: ***Finance Officers Networking***

FACILITATOR: *Don Harrer, Administrative Services Director, Cumberland County Mental Health Center*

DESCRIPTION: *Discussion of financial and operational issues that are daily challenges in your agency. Share concerns and learn what others have done or are doing to work through those same type issues. What are your training needs for the next conference? Do you know of topics and speakers that you would like to see on the Fall Conference Agenda? Share those with your facilitator.*

Track 2

SESSION: ***Reimbursement Officers Networking***

FACILITATOR: *Carol Quinn, Claims Examiner Clerk, Eastpointe*

DESCRIPTION: *Open forum for reimbursement staff in your agencies to discuss the many issues and challenges in reimbursement departments across the state. Come ready to share your experiences and learn from your peers. What are your training needs? Do you know of topics and speakers that you would like to see on the Fall Conference Agenda? Share those with your facilitator.*

Track 3

SESSION**:* ***Provider Networking

***FACILITATOR**:* *Robert Willis, Executive Director*
R & S Willis, Inc.

***DESCRIPTION**: Join your fellow providers to discuss current issues pertinent to private providers. Share your experiences and learn from others. What are your training needs? Do you know of topics and speakers that you would like to see on the Fall Conference agenda? Share those with your facilitator.*

Track 4

SESSION**:* ***MIS Roundtable

***FACILITATOR**:* *Bill Battaile, IT Director, Mecklenburg County MH/DD/SAS*

***DESCRIPTION**: Join in this roundtable discussion on the many issues facing IT Directors and their staff. Come and share ideas and take the opportunity to participate in open discussion with your peers across the state. What are your training needs? Do you know of topics and speakers that you would like to see on the Fall Conference agenda? Share those with your facilitators.*

Track 5

SESSION**:* ***QI / Provider Relations Networking

***FACILITATOR**:* *Jay Taylor, Pathways*

***DESCRIPTION**: Join your fellow peers across the state to discuss the current issues and concerns in the QI and Provider Relations Networking area. What are your training needs? Do you know of topics and speakers that you would like to see on the Fall Conference agenda? Share those with your facilitator.*

5:00 P.M. ***NC FARO Committee Meeting** – Boardroom A*

5:30 – 6:15 P.M. ***HOSPITALITY SUITE** – Rooms 701-707 – Exhibitor / Vendor Sponsored Event*
"Visit with friends – make dining plans"

9:00 – 11:30 P.M. ***HOSPITALITY SUITE** – Rooms 701-707 – Exhibitor / Vendor Sponsored Event*
"Network with fellow associates in other Agencies"

TUESDAY, MAY 1, 2007

7:30 – 8:20 A.M. ***CONTINENTAL BREAKFAST** – Azalea Room*
Exhibitor / Vendor Sponsored Event

7:45 – 8:30 A.M. ***REGISTRATION** – Lower Lobby Area (Boardroom A)*

8:30 – 10:00 A.M. – BREAKOUT SESSIONS
(Choice Of 6 Breakout Sessions)

Track 1

SESSION**:* ***Breaking News in Human Resources

SPEAKERS: *Kim Newsom, Randolph County Personnel*
Mel Crocker, Retiree – State of NC
Ann Taylor, pbH

DESCRIPTION: *This session will address the "what's happening" now in the Human Resources field. Issues to be covered will incorporate legislative actions, recent court case results, program changes, best practice solutions and other current 'tid bits' affecting the HR field. So if you are wondering what is the new minimum wage rate, what changed with the use of social security numbers, do I need an Affirmative Action Plan, or other current questions about HR, you should attend this session to find out the "breaking news".*

Track 2

SESSION**:* ***Magellan – Health Care Management Network

SPEAKER: *Kurt Boldt, Ph.D., Carolina's Network Manager, Magellan Health Services*

***DESCRIPTION**: This session will discuss Magellan's credentialing and contracting policy and procedures as well as their prior-authorization and claims payment process. A brief overview of Magellan's services will be provided.*

Track 3

SESSION: ***Protecting Sensitive Client Information through E-mail***

SPEAKER: *Brian Balicki, Ph.D., MHS*
Director, Health Care Compliance Group
SHS/ORC Macro

DESCRIPTION: *This session will describe what types of data are considered Protected Health Information (PHI) based on HIPAA guidelines and what type of security standards and/or software that can be used to send and receive PHI via electronic mail.*

Track 4

SESSION: ***Essentials of Advanced Excel***

SPEAKER: *Tommy Harrington, CompuHelp*

DESCRIPTION: *Learn the six functions that are used by all advanced Excel users. Learn when and how to use these functions to be an advanced Excel user in any organization or company. See the one command essential for getting the right data to the right place in the right order for advanced summary and reporting. You don't have to know everything Excel can do…just these essentials. This session will give Excel users new direction for automating repetitive reports in the easiest way possible. Save hours with these functions, shortcuts, and techniques.*

Track 5

SESSION: ***Strategies for Improving Direct Service Quality and Quantity***

SPEAKER: *David R. Lloyd, Founder and President of M.T.M. Services, LLC and*
Senior Consultant for National Council for Community Behavioral Healthcare

DESCRIPTION: *This full day session will provide solution strategies to successfully address the top twelve qualitative and quantitative barriers to community providers delivering direct/billable services including caseload size, no show rates, travel/paperwork to direct service ratios, and role of support staff. Additionally, Medical Necessity documentation linkage requirements for a Medicaid Rehab Option funding environment will be integrated into a recommended documentation model. Case study solutions that have been developed nationally will be provided so that attendees can develop specific action plans.*

Track 6

SESSION: ***Managed Budgets for Purchase of Service Contracts***

SPEAKERS: *LME Panel*

DESCRIPTION: *This session will bring together a panel of finance and UM staff from several Local Management Entities to discuss the intricacies of managing budgets and contracts through a service utilization/authorization process. Discussion will include what has worked, what hasn't worked and what we have to look forward to in the future with standardized benefit grids, sliding fee scales, etc.*

10:00 – 10:30 A.M. *BREAK: EXHIBITOR / VENDOR VISITATION – Azalea Room*

10:30 – 12:00 P.M. - BREAKOUT SESSIONS
(Choice of 6 Breakout Sessions)

Track 1

SESSION**:* ***Would the Real System of Care Please Stand Up?

SPEAKER: *Wendy Tonker, Organizational Development Consultant and System of Care Technical Assistant and Trainer*

DESCRIPTION: *Collaboration amongst child-serving agencies has come to be expected in communities across the country. The premise goes that if a child's needs span across agencies (mental health, juvenile justice, schools, child welfare, etc.), then working together will produce better outcomes. Working collaboratively seems logical and sounds simple enough to most of us. Truth be told, achieving meaningful outcomes can be much harder than it first appears. Agency policies and procedures often don't support the practice change that's being trained, funding is rarely integrated, agency cultures don't mesh, turfism and egos abound. Nurturing and supporting a System of Care in your community can help. Come discover how to get started in your community or to determine which calibrations might be necessary for your current system.*

Track 2

SESSION**:* ***Medicare through the eyes of NCDOI

***SPEAKER**:* *Barbara Pope, Regional Manager, Seniors' Health Insurance Information Program (SHIP)*

***DESCRIPTION**:* *Join this session for information regarding Medicare plans including Medicare Part D and the new HMO plans. Learn the ins and outs of the who, how and where's.*

Track 3

SESSION**:* ***NPI –Get One, Use It, Share It!!!

SPEAKER: *Brian Balicki, Ph.D. MHS*
Director, Health Care Compliance Group
SHS/ORC Macro

***DESCRIPTION**:* *May 23, 2007, is the implementation date for the new National Provider Identifier standards under HIPAA, except for small health plans which have until May 23, 2008. This new identifier is a requirement for all compliant electronic transactions under HIPAA. In short, it will affect the accuracy and timeliness of claims payment and adjudication between providers and payers. This session will review the key issues, objectives, strategies and opportunities associated with use of NPIs by the health care industry, particularly the behavioral health care community.*

Track 4

SESSION**:* ***Essentials of Advanced Excel, continued

***SPEAKER**:* *Tommy Harrington, CompuHelp*

***DESCRIPTION**:* *A continuation of previous session.*

Track 5

SESSION: ***Strategies for Improving Direct Service Quality and Quantity, continued***

SPEAKER: *David R. Lloyd, Founder and President of M.T. M. Services and*
Senior Consultant for National Council for Community Behavioral Healthcare

DESCRIPTION: *A continuation of previous session.*

Track 6

SESSION: ***<u>Developing and Updating PCP's Using NC-TOPPS</u>***

SPEAKER*:* *Mindy McNeely, MA, NC-TOPPS Project Director*
Center for Urban Affairs, NCSU

<u>DESCRIPTION</u>: *This session will provide an outline for using the information gathered using NC-TOPPS to be used to develop and update a consumer's Person Centered Plan (PCP). We will be walking through the PCP form in detail to show where information from the NC-TOPPS interview can help construct and update a plan from both the consumer's and the clinicians' perspectives. When you tie these important documents together it assists in making both of them relevant to clinical care and program improvement.*

12:00 – 1:30 P.M. *LUNCH ON YOUR OWN*

1:30 – 2:30 P.M. – BREAKOUT SESSIONS
(Choice of 6 Breakout Sessions)

Track 1

SESSION*:* ***<u>Ethical Officials, Ethical Contracting, and Related Legal Considerations</u>***

SPEAKER: *A. Fleming Bell, II*
Professor of Public Law and Government, Institute of Government

<u>DESCRIPTION</u>: *What does it mean to serve the public in an ethical manner? How does one go about making decisions in a way that promotes a positive ethical climate in an organization? In this two-part session, we will consider these issues, as well as some of the legal and ethical concerns affecting contracting in the mental health field.*

Track 2

SESSION*:* ***<u>Medicaid Paid Claims Data File for LMEs</u>***

SPEAKERS: *Tim Wildfire, Information System Business Consultant, Wake County Human Services*
Adam Holtzman, Analyst, Division of MH/DD/SAS

<u>DESCRIPTION</u>*:* *A new data file that includes all behavioral health related Medicaid claims for residents of each LME is now available! Tim and Adam will walk through the process of accessing the data as well as explore approaches for the use of LME Medicaid claims data.*

Track 3

SESSION: ***<u>Is Your Record Audit Ready</u>?***

SPEAKER: *Marilyn Brothers, CWBH Consultants, LLC*

<u>DESCRIPTION</u>*:* *This session will provide you with information to consider and actions you may need to take as you prepare for the Medicaid audit. Topics will include how to have the records "audit ready" as well as what other records such as personnel, training, etc. records you will need to have available. The session will include discussions regarding what your agency should be doing throughout the year to have the medical record "audit ready."*

Track 4

SESSION: ***<u>Excel – Electronic Forms</u>***

SPEAKER: *Tommy Harrington, CompuHelp*

<u>DESCRIPTION</u>: *Excel has features to allow you to create electronic forms. Excel cannot only help you summarize data but also help you collect it. Learn about the many form features of Excel. Build forms that allow others to enter information easily and conveniently while controlling accuracy. You will be amazed at Wizards in Excel that assist you with data collection.*

Track 5

SESSION: ***Strategies for Improving Direct Service Quality and Quantity, continued***

SPEAKER: *David R. Lloyd, Founder and President of M.T.M. Services and Senior Consultant for National Council for Community Behavioral Healthcare*

DESCRIPTION: *A continuation of previous sessions.*

Track 6

SESSION: ***Community Support Focused Audits***

SPEAKER: *Sandee Resnick, Compliance Unit Leader, Division of MH/DD/SAS*

DESCRIPTION: *Presentation will include information on the targeted nature of the community support audits, the process for determining providers, the audit tool used and information on how the rating for each question is determined, and overall statewide results.*

2:30 – 3:00 P.M. *BREAK: EXHIBITOR / VENDOR VISITATION – Azalea Room*

3:00 – 4:30 P.M. – BREAKOUT SESSIONS
(Choice of 5 Breakout Sessions)

Track 1

SESSION: ***Ethical Officials, Ethical Contracting, and Related Legal Considerations, continued***

SPEAKER: *A. Fleming Bell, II*
Professor of Public Law and Government, Institute of Government

DESCRIPTION: *A continuation of previous session.*

Track 2

SESSION: ***Plans of Correction (POC) and Revocation Process from a DMHDDSAS, Accountability Team Perspective***

SPEAKER: *Marvin Sanders, DMHDDSAS, Accountability Team, Regulatory Unit Accountability Specialist*

DESCRIPTION: *This session will cover the Division's Policy on Plans of Correction and Provider Revocation. This information may be helpful to your agency in the development and implementation of local POC Policy. Discussion will include how to tie local monitoring POCs to the State POC system and revocation process.*

Track 3

SESSION: ***IPRS, CDW Updates & Preparing for a Merger***

SPEAKERS: *Thelma Hayter, Division of MH/DD/SAS*
Cheryl McQueen, Division of MH/DD/SAS
Deborah Merrill, Division of MH/DD/SAS

DESCRIPTION: *This session will be divided into two parts. Part one will give an overview of any CDW, IPRS, or NC TOPPS updates. Part two will provide an in depth discussion of how mergers affect three (CDW, IPRS, NCTOPPS) of the major data systems in the Division of MH/DD/SAS. Information will be shared on how to prepare for a merger from the data perspective. Each data system will be addressed by a presenter.*

Track 4

SESSION: ***Strategies for Improving Direct Service Quality and Quantity, continued***

SPEAKER: *David R. Lloyd, Founder and President of M.T.M. Services and Senior Consultant for National Council for Community Behavioral Healthcare*

DESCRIPTION: *A continuation of previous sessions.*

Track 5

SESSION: ***Reconciling Differences between HIPAA and State Confidentiality Law – Part II***

SPEAKER: *Mark F. Botts, J.D., Associate Professor of Public Law and Government, School of Government*
The University of North Carolina at Chapel Hill

DESCRIPTION: *A continuation of Monday's session.*

4:45 – 6:10 P.M. ***HOSPITALITY SUITE*** *– Rooms 701-707- Sponsored by Exhibitors / Vendors*
"Visit with friends"

6:15 – 7:30 P.M. ***BANQUET BUFFET*** *– Magnolia / Dogwood / Camellia - Sponsored by NC FARO*
(See registration info page for menu.) Dress: Casual/Colorful

7:30 – 8:15 P.M. *Speaker/Entertainment to be determine (tune in to website for update).*

8:30 – 12:30 A.M. ***ENTERTAINMENT*** *– Liquid Pleasure*
Magnolia / Dogwood / Camellia - Sponsored by Exhibitors / Vendors

WEDNESDAY, MAY 2, 2007

7:45 – 8:40 A.M. ***CONTINENTAL BREAKFAST*** *– Azalea Room*

8:45 – 10:00 A.M. – JOINT SESSION

SESSION: ***State of the State***

SPEAKER: *Leza Wainwright, Deputy Director*
Division of MH/DD/SAS

DESCRIPTION: *This session will provide an update of current issues with Mental Health Reform, outline for the audience "The Long Range Plan for Meeting Mental Health, Developmental Disabilities, and Substance Abuse Needs for the State of North Carolina", and strategies of implementation by the Division.*

10:00 – 10:30 A.M. *BREAK : EXHIBITOR / VENDOR VISITATION – Azalea Room*

10:30 – 11:45 A.M. – JOINT SESSION

SESSION: ***State of the State, continued***

SPEAKER: *Leza Wainwright, Deputy Director*
Division of MH/DD/SAS

DESCRIPTION: *A continuation of previous session.*

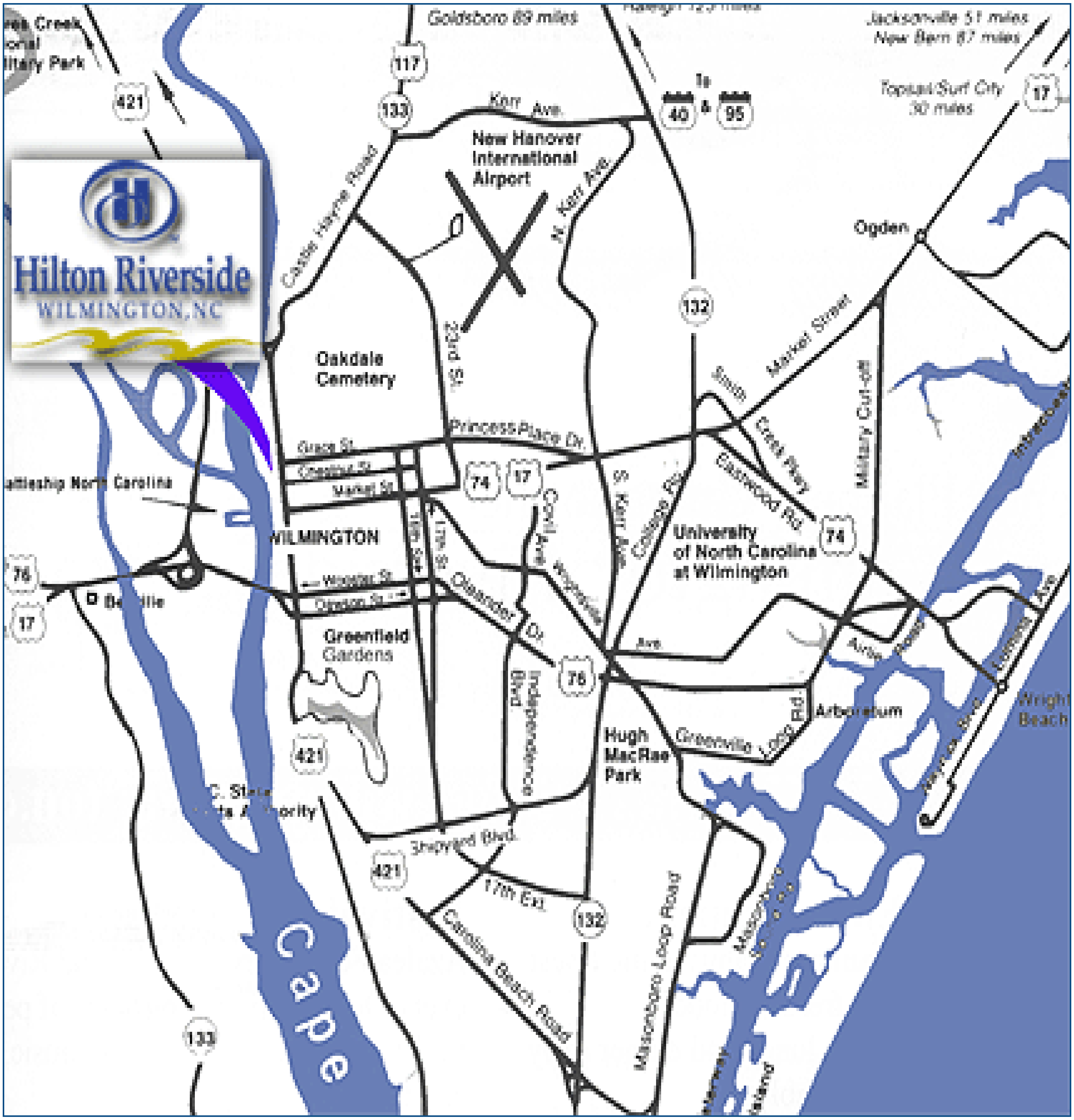
11:45 – 12:00 P.M. *CLOSING REMARKS / DOOR PRIZES*

THANKS FOR BRINGING YOUR DOOR PRIZE

Directions to the Hotel:

301 North Water Street
Wilmington, NC 28401-3934
(910) 763-5900

The Hilton Riverside - Wilmington, NC is located in the heart of the Historic Downtown District on the shore of the Cape Fear River.



DIRECTIONS TO THE HOTEL

From 74/76 East Bound:

- Follow 74/76 into Wilmington and cross over the Cape Fear Memorial Bridge.
- Go to stop light.
- Turn LEFT at stop light on 3rd Street and go approximately eight (8) city blocks.
- Turn LEFT on Market Street and go straight until you reach the Cape Fear River.
- Turn RIGHT on Water Street. Go two (2) city blocks and the Hilton is on the LEFT.

From 17 - North Bound:

- Follow Highway 17 North until it merges with 74/76 East Bound.
- Follow the same instructions listed above, "From 74/76 East Bound".

From 17 - South Bound:

- Follow Highway 17 South until it merges with Market Street. Go STRAIGHT on Market Street for about ten (10) miles until you reach the Cape Fear River.
- Turn RIGHT on Water Street. Go two (2) city blocks and the Hilton is on the LEFT.

From I-40 East Bound (from Raleigh)

- Follow I-40 into Wilmington.
- GO PAST the Wilmington/Wrightsville Beach Exit (Martin Luther King Jr. Parkway).
- Take the NEXT EXIT, which is EXIT 8 (Market Street)
- Turn LEFT on Market Street (also Highway 17 South).
- Go STRAIGHT on Market Street for about five (5) miles until you reach the Cape Fear River.
- Turn RIGHT on Water Street. Go two (2) city blocks and the Hilton is on the LEFT.

From Wilmington International Airport:

- Take LEFT out of airport entrance onto 23rd Street.
- Follow 23rd Street until you reach Market Street
  Turn RIGHT onto Market Street.
- Follow Market Street all the way downtown until you reach the Cape Fear River.
- Turn RIGHT on Water Street. Go two (2) city blocks and the Hilton is on the LEFT.

CONFERENCE REGISTRATION: Payment must be **postmarked no later than April 6, 2007** to receive early conference rate. **Completed registration form must accompany payment**. Individuals will not be registered until payment is received.

Registration Fees:

	Early Registration by 4/6/07	After 4/6/07
FARO Members (LME/AP, Provider, DHHS) – be sure you are a member	$ 150.00	$ 175.00
Non-Members (LME/AP, Provider, DHHS)	$ 180.00	$ 205.00
One Day (LME/AP, Provider, DHHS)	$ 95.00	$ 120.00
On-site Registration (all) – Payment in hand only (no banquet ticket)		$ 225.00

Please be sure to include (***please print clearly***) your email address on registration form so confirmation can be made (Note: All confirmations will be made by email – **no** postal mailings will be made**). If you think you are registered but have not received a confirmation by email, contact Alice Matthews at abmcms@aol.com.** Otherwise***, if payment has not been received (regardless that you think it is in the mail), you will be required to pay registration fee upon arrival at conference***.

MAKE CHECK PAYABLE TO 'NC FARO' Mail to: **Alice Matthews** **Amount to be Paid $ ______________**
NC FARO
P O Box 9361
Fayetteville, NC 28311

Please help with seat planning. Place a check mark in the space to indicate sessions you plan to attend.

__New Issues in Compliance for Reimbursement Officers
__Record Retention: Managing Records Responsibly..
__Customer Service and Communications
__The Revenue Cycle
__DMA Update
__Public Reports Used to Improve LME Decision Making
__NC Practice Improvement Collaborative
__Developing Outcome and Performance Measurements
__Using the Revenue Cycle as Compliance Tool
__IT Investment Strategies
__Reconciling Differences Between HIPAA and State-Part I
__The MH/DD/SA Service Records Manual
__Internal Accounting Controls – A Refresher
__Personal Safety – Make It Personal to You!
__Using the Revenue Cycle as Compliance Tool, cont.
__Cultural and Linguistic Competency
__Wireless: The Wave of the Future?
__Navigating the P & C Website
__Subrecipient Monitoring 101: The LMEs Responsibility
__Self Defense
__Finance Officers Networking
__Reimbursement Officers Networking
__Provider Networking
__MIS Roundtable
__QI/Provider Relations Networking
__Breaking News In Human Resources
__Magellan – Health Care Management Network
__Protecting Sensitive Client Information through E-mail
__Essentials of Advanced Excel
__Strategies for Improving Direct Service Quality & Quantity
__Managed Budgets for Purchase of Service Contracts
__Would the Real System of Care Please Stand Up?
__Medicare Through the Eyes of NCDOI
__NPI – Get One, Use It, Share It!!!
__Essentials of Advanced Excel, continued
__Strategies for Improving Direct Service Quality & Quantity, cont.
__Developing and Updating PCP's Using NC-TOPPS
__Ethical Officials, Ethical Contracting & Related Legal Cons.
__Medicaid Paid Claims Data File for LMEs
__Is Your Record Audit Ready?
__Excel – Electronic Forms
__Strategies for Improving Direct Service Quality & Quantity, cont.
__Community Support Focused Audits
__Ethical Officials, Ethical Contracting & Related Legal Cons, cont
__Plans of Correction & Revocation Process
__IPRS, CDW Updates & Preparing for a Merger
__Strategies for Improving Direct Service Quality & Quantity, cont.
__Reconciling Differences between HIPAA and State – Part II
__State of the State

(Please print clearly)
NAME:____

TITLE:____

AGENCY:____

MAILING ADDRESS: ____

CITY: ______________________________STATE:__________ZIP CODE:_______________

PHONE: ____________________________E-MAIL:_________________________________

MEMBERSHIP STATUS: ___ FARO **MEMBER** (LME / AP / PROVIDER / DHHS)
___ **NON-MEMBER**

CONFERENCE ATTENDANCE > ___FULL CONFERENCE
___ONE DAY (__Mon __Tue __Wed) (check day)

*BANQUET RESERVATIONS > ___I WILL ATTEND
(see page 2 for banquet info) ___I WILL NOT ATTEND
___I WILL NEED AN EXTRA TICKET (for spouse, friend, one day)-Enclose $30