



FINANCE & REIMBURSEMENT OFFICERS

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

NC FARO 2008 SPRING CONFERENCE

A large, light gray rectangular frame with rounded corners and a double-line border. Inside the frame, the words "REGISTRATION" and "AGENDA" are centered in a large, bold, black, sans-serif font, stacked one above the other.

REGISTRATION AGENDA

APRIL 27 – APRIL 30, 2008

HILTON WILMINGTON RIVERSIDE
301 NORTH WATER STREET
WILMINGTON, NC 28401
Phone: 910-763-5900

NC FARO Spring 2008 Conference
April 27 – 30, 2008
Wilmington, NC

CONFERENCE INFORMATION: PLEASE READ!

Important Registration Info: **Payment must be received with completed registration form.** Credit cards not accepted at this time. 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. **If you think you are registered but have not received a confirmation by email,** contact Alice Matthews at abmcms@aol.com or by phone at 910-488-5170. 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.** Mailed registrations **must be received by noon on April 23, 2008** (be sure to mail your registration and payment in advance to ensure receipt by this date). On-site registration will be accepted – payment by checks or cash (see rate below for on-site registration). Note: There will be a \$25 returned check fee.

NOTE: A full conference registration cannot be shared among multiple individuals. One day registrations are designed to accommodate one day attendees. Each individual attending conference must be registered either as a one day or for full conference.

ATTENTION: Each person registered for conference must individually pick up his or her registration packet at FARO check-in.

Registration Fees:

	Postmarked Early Registration by 4/4/08	Postmarked 4/5/08-4/21/08
FARO Member (LME/AP, Provider, DHHS) – <u>be sure you are a member*</u>	\$ 150.00	\$ 175.00
Non-Members (LME/AP, Provider, DHHS, others)	\$ 180.00	\$ 205.00
One Day (LME/AP, Provider, DHHS)	\$ 95.00	\$ 120.00
On-site Registration (member/non-member) – <u>Payment in hand only</u> (no banquet ticket available**)		\$ 225.00

**Banquet attendance count is given to hotel prior to the conference.

*If you are unsure as to your membership status, please contact the membership committee member listed below.

Cancellation Policy: Registration fees less a \$15 administrative fee will be refunded if request is received by 5 p.m. April 4, 2008. April 5-13, 2008 refunds less a 50% cancellation fee will be honored at your request. No requests for refunds will be accepted after 5 p.m. beginning April 13, 2008. 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 2008 Conference will be held at the Hilton Wilmington Riverside, 301 North Water Street, Wilmington, NC 28401. **Phone 910-763-5900 for reservations.** Please state that you are with NC FARO – NC Finance and Reimbursement Officer's Association. A block of 250 rooms has been reserved for the NC FARO conference **on a first come first serve basis.** 210 rooms are available at the Hilton Wilmington Riverside and 40 rooms are available at the Riverside Suites. The room rate is \$105 per room plus sales/room occupancy taxes and parking (\$4.00/day overnight guests, \$5.00/day daily attendees, \$10.00/day valet parking). The reservation cut off date is Wednesday, March 26, 2008 or until the block of 250 is filled, so make your reservations NOW. All reservations must be accompanied by a first night room deposit or guaranteed with a major credit card. Hotel will not hold any reservations unless secured by one of the above methods. Guest room check-in/Check-out time is as follows:

Check-in Time 4:00 PM Check-Out Time: 11:00 AM

[Overflow will be at the Coastline Inn (Best Western), 503 Nutt Street, Wilmington, NC 28401. Phone 910-763-2800 or 800-617-7732, King/Double/Queen at \$109.00 plus 12.75% room occupancy tax. Overflow will also be at Shell Island, 800-689-6765 or 910-256-8696 with rates the same as the Hilton.]

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, 910-298-7135

Conference Registration questions contact: Alice Matthews, abmcms@aol.com, 910-488-5170

Provider questions contact: Gayle Mahl, gmahl@pathmhdds.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. If you do **NOT** plan to attend the banquet mark the "I Will **Not** Attend" box. Additional banquet tickets (for spouse, friend, one day) may be purchased for \$30.00 each (you must register and pay in advance for extra ticket). 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 ticket will be available for on-site registrations (the hotel requires number count for banquet prior to conference).

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

Directions to the Hotel: Visit our website at www.ncfaro.org for directions.

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.
- **NO SOLICITATION** verbally or distribution of company materials in sessions or at other sponsored FARO events unless you are a **registered** vendor.
- Conference room temperatures vary. **Please wear layered clothing to ensure your personal comfort.**

****Visit the FARO website at www.ncfaro.org for conference updates and/or changes****

NORTH CAROLINA FINANCE, REIMBURSEMENT AND
MIS OFFICER'S (NC FARO) SPRING 2008 CONFERENCE

SUNDAY, APRIL 27, 2008

5:00 – 7:00 P.M. **EARLY REGISTRATION** – Lower Lobby

9:00 – 11:30 P.M. **HOSPITALITY SUITE** – Room 331 North Tower, Exhibitor / Vendor Sponsored Event
“Visit with friends and meet new FARO participants”

MONDAY, APRIL 28, 2008

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

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

8:15 – 9:00 A.M. **WELCOME**
Beth Brown, Pathways
2008 NC FARO President

VENDOR INTRODUCTIONS

9:00 – 10:15 A.M. – BREAKOUT SESSIONS
(Choice of 6 Breakout Sessions)

Track 1

SESSION: **Current Fair Labor Standards Act Compliance Issues – FLSA Investigations & Litigation**

SPEAKER: *Mark Knuckles, Human Resource Management Consultant*
Mark Knuckles Associates, Inc.

DESCRIPTION: Attendees will learn the latest enforcement activities of the USDOL, what investigators are looking for and the compliance issues found in investigations and in litigation. Subjects covered will include the Part 541 salaried exemption tests, what positions and duties are being challenged, how investigators are attacking Administrative and Professional exemptions. Attendees will learn how to protect their exemptions and what position descriptions must say and document. The presenter will also discuss the new definition of hours of work, how the “principal activities” can start the work day and what is the “continuous work day rule.” Subjects will also include the latest enforcement information on the contractor v employee issue, common mistakes with the fluctuating work week plan, salaries and deductions, on-call and standby pay, volunteers and other “hot button” compliance issues with the FLSA. The presenter, Mark Knuckles of Hickory, North Carolina, is a recognized expert with FLSA compliance. His firm, Mark Knuckles Associates, Inc. provides “expert witness” services and testimony for plaintiffs and respondents across the nation, including litigation against employers in North Carolina. The firm is also assisting public and private employers under investigation by the U.S. Department of Labor Wage Hour Division and the Office of Federal Contract Compliance Programs, OFCCP. Mark Knuckles Associates is an approved training provider by the Human Resource Certification Institute, HRCI, and application is being requested for five (5) hours rectification credit for PHR, SPHR, and GPHR certifications.

Track 2

SESSION: **Medicare 2008 Updates for Billing of Behavioral Health Services**

SPEAKER: *Deanna H. Menshew, Provider Relations Representative*
CIGNA Government Services of North Carolina

DESCRIPTION: This session will focus on the most recent and upcoming changes to the Medicare Program for Medicare “eligible” providers. Materials will include service codes that are billable to Medicare, type providers that are eligible to be a direct enrolled Medicare provider, documentation requirements, and administrative considerations for Behavioral Health professionals.

Track 3

SESSION: **FEM and Monitoring Tool: Lessons Learned So Far**

SPEAKERS: *LME and Provider Panel*

DESCRIPTION: LME and Provider panel will discuss the Frequency and Extent of Monitoring Tool along with the new Monitoring tool. Target audience is LME staff and Provider staff. LME staff will gain a better understanding of how to use these tools for monitoring. Provider staff will gain an improved understanding of how these tools impact their Quality Management functions.

Track 4

SESSION: **Disclosing Criminal Activity or Threatening Behavior of MH/DD/SA Clients**

SPEAKER: *Mark F. Botts, Associate Professor of Public Law and Government
School of Government, UNC Chapel Hill*

DESCRIPTION: Learn what the three main confidentiality laws (state MH/DD/SA law, HIPAA, and 42 CFR Part 2) say about disclosing confidential information when a client reports past criminal behavior, current criminal behavior, or a plan to harm another individual. Session will outline options available to treatment providers who must balance client privacy with public safety.

Track 5

SESSION: **Crystal Reporting Tips and Tricks**

SPEAKER: *Rick Yeager, Programmer
Southeastern Center for MH/DD/SAS*

DESCRIPTION: This session includes Parameter Fields – Common uses, using parameters to affect grouping, sorting, formatting, and detail level of a report, range and multiple parameters; Sub-Reports – Unlinked vs linked sub-reports, parameters in sub-reports, tips for working with sub-reports; Adding Charts – Using the Chart Expert, drilling down on chart elements; Running Total Fields – Using variables to create and display running totals in places other than footers; Variables – Arrays and ranges, variable scope and evaluation time, variable and formula overkill; Formulas – Programming shortcuts explained, Crystal syntax vs Basic syntax, formatting strings; Using SQL within Crystal Reports – Displaying the SQL statement, writing your own SWL statement from scratch, creating a simple DSN for use with SQL Server databases, viewing reports in NetSmart based on an external database; External Databases – Reporting on Medicaid Paid Claims, Value Options and NC-TOPPS data stored in an external SQL Server 2005 database; and Other Topics – Using report templates and graphics for a uniform look, changing and displaying document properties, “Report Options” vs Crystal options and the most common settings for each, limitations of the Crystal viewer in NetSmart.

Track 6

SESSION: **Job Image – Professional Savvy**

SPEAKER: *Lin Mitchell, Management Communication Consultant*

DESCRIPTION: This program equips you with the skills and knowledge required in today's competitive job-seeking world. This is about keeping a job and getting ahead. Identify employer's expectations, develop critical job survival skills, increase productivity, and improve job satisfaction and success.

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

10:45 – 12:00 P.M. – BREAKOUT SESSIONS
(Choice of 6 Breakout Sessions)

Track 1

SESSION: **Current Fair Labor Standards Act Compliance Issues – FLSA Investigations & Litigation**

SPEAKER: *Mark Knuckles, Human Resource Management Consultant
Mark Knuckles Associates, Inc.*

DESCRIPTION: This will be a continuation of previous session.

Track 2

SESSION: Topics of Interest to our Nonprofit Providers

SPEAKER: Don McLamb, Audit Resolution Coordinator for Government Audits
DHHS Controller's Office

DESCRIPTION: For non-profit entities who contract with either the State or with an LME, the non-profit staff must know both the programmatic and administrative requirements of doing business with the State. This session will cover the primary administrative topics that all non-profit entities must know in order to ensure that Federal and State requirements are met. These topics include (1) Organization of the Non-profit Agency, (2) Budget and Management, (3) Personnel, (4) Accounting, (5) Contracting, (6) Audits and other Financial Reporting, and (7) Developing a Chart of Accounts. Come and learn more about the "behind the scenes" work that must be done to keep a non-profit entity running smoothly.

Track 3

SESSION: State of the Data of the State

SPEAKERS: Shealy Thompson, Division of MH/DD/SAS
Spencer Clark, Division of MH/DD/SAS

DESCRIPTION: This session will provide an overview of the state's community-based service system today, based on data submitted to the Division of MH/DD/SAS by service providers and LMEs. Past and projected trends in service availability and utilization, coordination of care, and consumer outcomes will be presented. The session will highlight information about crisis services, substance abuse services, and community support services.

Track 4

SESSION: Introduction to Process Mapping

SPEAKER: Ben B. Graham, President, The Ben Graham Corporation

DESCRIPTION: The session will provide an introduction to the Graham methodology for mapping business processes. Process maps provide a baseline for process improvement and are excellent training tools if they include enough detail to support common sense decisions. The Graham process charting methodology was initially developed over a half century ago to help people analyze business processes. Graham charts clearly identify the documents in a process...the value-added points where data is manipulated...the reports that are generated and the people involved. With this information at hand, the current process can be analyzed in detail before it is overhauled so that true requirements get into the specification and unnecessary data, flow, work...is kept out.

Track 5

SESSION: Excel Shortcuts – Increasing Productivity

SPEAKER: Tommy Harrington, CompuHelp

DESCRIPTION: Instruction on advanced Excel features and techniques will increase productivity of all Excel users. Shortcuts, shortcuts, and more shortcuts! Become an expert on the Data Commands—Sort, Validation, Filter, Subtotals, and PivotTables. You will learn techniques to automate repetitive reports, and create management and government reports whenever new data is simply entered or imported. You will be amazed when you see all Excel's features for summarizing accounting, production, and management information. Learn tips and shortcuts to save hours each week.

Track 6

SESSION: The Joy of Stress

SPEAKER: Lin Mitchell, Management Communication Consultant

DESCRIPTION: Stress is an individual reaction; it can be fantastic or it can be fatal. The choice of how we respond is up to each of us. Believe it or not, stress can be a positive experience! You can combat stressful situations with humor, wisdom, and patience. Learn how stress affects your body, mind, relationships, and spirit. Learn how to deal with stress and prevent "hardening of the attitude".

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: Current Fair Labor Standards Act Compliance Issues – FLSA Investigations & Litigation

SPEAKER: Mark Knuckles, Human Resource Management Consultant
Mark Knuckles Associates, Inc.

DESCRIPTION: This will be a continuation of previous sessions.

Track 2

SESSION: Ensuring Compliance with the Financial and Reporting Requirements of a Non-Profit Entity

SPEAKER: Denise Roberts, Office of State Auditor

DESCRIPTION: This session will introduce you to a series of workshops sponsored by the Office of State Auditor that are designed to help non-profit organizations gain better control of their financial operations. Our workshops include: Use of state grant funds by non-state entities (GS143C-6-23 reporting requirements), the basics of internal control, creating effective policies and procedures, identifying allowable and unallowable costs, and creating effective grant monitoring programs. Completion of these 5 workshops leads to a Certificate in Effective Grants Administration. Also, OSA offers 3 additional courses: Board of Directors' Roles and Responsibilities, Basic Accounting for Grants, and Identifying Client Services.

Track 3

SESSION: The DMH/DD/SAS Records Management and Documentation Manual – When the Rubber Meets the Road

SPEAKER: Nancy Law Rogers, Division of MH/DD/SAS

DESCRIPTION: This session involves a discussion of some of the questions that have been raised since the publication of the manual, and provides some answers and clarification regarding its implementation.

Track 4

SESSION: Process Mapping - Workflow

SPEAKER: Ben B. Graham, President, The Ben Graham Corporation

DESCRIPTION: How to draw a flowchart and understand how it is used to effectively improve a work process and to develop written procedures. This session works through several exercises to familiarize the student with drawing and using a process map, the most fundamental tool of professional systems analysis.

Track 5

SESSION: CDW Screening Admission & Discharge Data Collection

SPEAKER: Tom Palombo, Division of MH/DD/SAS

DESCRIPTION: This session will discuss what is required for data collection of screening, admission and discharge data. Information will be shared on how to utilize the Standardized Screening, Triage and Referral Form and Person Centered Plan Admission Form to aid in the collection of this data.

Track 6

SESSION: Preventing Job Burnout

SPEAKER: Lin Mitchell, Management Communication Consultant

DESCRIPTION: Burnout is defined as "exhaustion of physical or emotional strength or motivation usually as a result of prolonged stress or frustration". This session will introduce proven strategies for beating job burnout.

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

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

Track 1

SESSION: **Current Fair Labor Standards Act Compliance Issues – FLSA Investigations & Litigation**

SPEAKER: *Mark Knuckles, Human Resource Management Consultant
Mark Knuckles Associates, Inc.*

DESCRIPTION: This will be a continuation of previous sessions.

Track 2

SESSION: **Basic Medicaid**

SPEAKER: *Theresa Diana, Publications Specialist/Travel Representative
EDS*

DESCRIPTION: A review of the Basic Medicaid Billing Guide with a focus on recipient eligibility. There will be a PowerPoint presentation that includes an overview of who's in the Medicaid program, NPI, EPSDT, general claim submission guidelines and how to contact Medicaid.

Track 3

SESSION: **NC Practice Improvement Collaborative Update**

SPEAKERS: *Dr. Michael Lancaster, Chief of Clinical Policy Management, Division of MH/DD/SAS
Flo Stein, Chief of Community Policy Management Section, Division of MH/DD/SAS*

DESCRIPTION: As we improve the quality of services for our MH/DD/SAS consumers nationwide, we have the opportunity to review evidenced based practices, and best practice models of care. Here in North Carolina the Practice Improvement Collaborative (PIC) has taken this responsibility in all of the disability areas. The goal in the PIC is to identify national models of care, review North Carolina adaptations of those models, and support their implementation across the state. This presentation will identify the current progress of the NC PIC process, best practice models of care identified, and implementation strategies for these practices.

Track 4

SESSION: **Process Mapping – Workflow, continued**

SPEAKER: *Ben B. Graham, President, The Ben Graham Corporation*

DESCRIPTION: This will be a continuation of previous session.

Track 5

SESSION: **Virtualization Executive Overview**

SPEAKER: *Richard Swirski, Consultant*

DESCRIPTION: This non-technical presentation will go into the high level concepts of Virtualization. Topics will include a briefing on the subject, drivers, advantages and challenges associated. Focus will be on VMWare Solutions but solutions from other vendors will be discussed as well. At the end of the session, attendees should have a general understanding of Virtualization and how it might fit in their environment.

Track 6

SESSION: **Conflict Resolution**

SPEAKER: *Lin Mitchell, Management Communications Consultant*

DESCRIPTION: Conflict occurs whenever the needs, interests or wants of two parties are opposed to each other. Most of us try to avoid conflict – but it's a fact of life. You can't escape it, but you can learn an effective, comfortable way to deal with conflict.

4:30 – 5:30 P.M. – NETWORKING SESSIONS
(Choice of 6 Networking Sessions)

Track 1

SESSION: Finance Officers Networking

FACILITATOR: Kelly Goodfellow, Finance Officer, The Durham 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 Fall 2008 conference? Do you know of topics and speakers that you would like to see on the fall agenda? Share those with your facilitator.

Track 2

SESSION: Reimbursement Officers Networking

FACILITATOR: Ilene Byrd, Eastpointe

DESCRIPTION: Open forum for reimbursement staff in your agency to discuss the many issues and challenges in reimbursement departments across the state. Discussion will include billing multiple services on the same day, billing group therapy, service referral, billing with NPI and other new requirements. Bring your questions and concerns to discuss with your peers. What are your training needs for Fall 2008 conference? Do you know of topics and speakers that you would like to see on the fall agenda? Share those with your facilitator.

Track 3

SESSION: Provider Networking

FACILITATOR: Carla Balestra, True Behavioral Healthcare

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 for Fall 2008 conference? Do you know of topics and speakers that you would like to see on the fall agenda? Share those with your facilitator.

Track 4

SESSION: IT Roundtable

FACILITATOR: George Scott, Western Highlands

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 for Fall 2008 conference? Do you know of topics and speakers that you would like to see on the fall agenda? Share those with your facilitator.

Track 5

SESSION: QM Roundtable

FACILITATOR: Anna North, Eastpointe

DESCRIPTION: Join your fellow peers across the state to discuss issues and concerns in the QI and Provider Relations Networking area. What are your training needs for Fall 2008 conference? Do you know of topics and speakers that you would like to see on the fall agenda? Share those with your facilitator.

Track 6

SESSION: Consultants Roundtable

FACILITATOR: Jay Taylor, Pathways LME

DESCRIPTION: This session is designed to bring consultants together in conversation about resource sharing, standards of practice, and increased collaboration. This will be a facilitated discussion with participant interaction. This is the first attempt at a session specifically for consultants and we hope to get conversations started that will elevate the level of performance in this important and growing segment of the industry.

HOSPITALITY SUITE – Room 331 North Tower – Exhibitor / Vendor Sponsored Event
"Come, relax and visit with other participants. Make new friendships and partnerships."

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

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

Track 5

SESSION: **Virtualization Deep Dive**

SPEAKER: *Richard Swirski, Consultant*

DESCRIPTION: This technical presentation will go into the details associated with implementing and managing Virtualization. Focus of the presentation will be on VMWare, but solutions from Sun, IBM, Microsoft and RedHat will be discussed as well.

Track 6

SESSION: **Leadership Needed for the Times of Change**

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

DESCRIPTION: Sounds like political rhetoric for some high elected office. Actually all supervisors, from the newest kid on the block to the seasoned veteran, frequently find the need to assess their leadership approach to solving problems. With so many changes continuing to dictate that organizations must be flexible, this session will address how leadership can be effective in leading necessary and effective change. Join us as we discuss the qualities and characteristics of the true leader.

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

<p>10:30 – 12:00 P.M. - BREAKOUT SESSIONS (Choice of 5 Breakout Sessions)</p>

Track 1

SESSION: **Has Electronic Record-Keeping Invaded the MH/DD/SAS?**

SPEAKERS: Mary Tripp, Division of MH/DD/SAS
 Cheryl McQueen, Division of MH/DD/SAS

DESCRIPTION: This workshop will focus on the impact of electronic record-keeping on service delivery and billing. The current status and challenges of implementing an electronic record-keeping system in the MH/DD/SAS system will be discussed in light of the impact of such federal requirements as HIPAA and NPI.

Track 2

SESSION: **DMA Update, continued**

SPEAKER: *Tara Larson, Division of Medical Assistance*

DESCRIPTION: A continuation of previous session.

Track 3

SESSION: **QM 102: Internal Monitoring**

SPEAKER: *Sue Creighton, CWBH Consultants, LLC*

DESCRIPTION: This session focuses on real world tasks to develop and improve a system of internal monitoring. The following questions will be addressed: What do you need to monitor? How do you do it? What are the external references to determine standards? How do we set our internal standards?

Track 4

SESSION: CAP-MR/DD Tiered Waivers

SPEAKER: Rose Burnette, Division of MH/DD/SAS

DESCRIPTION: The Division of MH/DD/SAS and the Division of Medical Assistance are responsible for the operational and administrative functions of the 1915(c) Home and Community Based Waiver for individuals with intellectual and developmental disabilities. The Divisions are in the process of working with stakeholders to create a system of Tiered Waivers to be implemented at the expiration of the current Comprehensive Waiver. The development of the Tiered Waivers is an opportunity to enhance best practice approaches to delivering services and supports for individuals who experience intellectual and developmental disabilities. Best practice approaches to be included in the waivers include: Person Centered Planning, Self-Direction, the use of the Supports Intensity Scale, the development of a Risk Assessment process, and enhancements to the current waiver service definitions.

Track 5

SESSION: Matrix Management: Moving from Silos to an Integrated Management Model

SPEAKERS: David Jones, Director of Clinical Operations, pbH
Niels Eskelsen, Director of Business Operations, pbH

DESCRIPTION: An overview of how PBH moved from an old “Silo” based management structure to an integrated management model. Focusing on new Matrix Management principles with discussions of organizational structure, key “Matrix” elements, and cross-functional team processes. Examples of team charters, team goals and outcomes, and team reporting processes will be provided.

12:00 – 1:30 P.M.

LUNCH ON YOUR OWN

1:30 – 2:45 P.M. – BREAKOUT SESSIONS (Choice of 6 Breakout Sessions)

Track 1

SESSION: How to Turn the Community Support Service Experience into a “Learning Community”

SPEAKER: Christina Carter, Division of MH/DD/SAS

DESCRIPTION: Community Support continues to be the most popular service within the array of new services established in March 2006. This session will provide an overview of the newly clarified Community Support service definition plus the current data surrounding the usage of the service. The presentation will provide comments of how this one service has had such a significant influence on the overall system. The recognition of this influence and all the understanding from various system activities provides a great opportunity to create a “learning environment”.

Track 2

SESSION: IPRS Updates

SPEAKER: Cheryl McQueen, Division of MH/DD/SAS

DESCRIPTION: This session will cover all of the latest information concerning IPRS. Single-Stream funding, reporting of county funds, NPI and upcoming system changes are among the topics that will be covered.

Track 3

SESSION: QM 103: Systems Data

SPEAKER: Shealy Thompson, Division of MH/DD/SAS

DESCRIPTION: This session is for LME and provider staff who are looking for ways to use current data systematically to monitor and improve service quality. It will address how to move from using data to monitor individual issues to using data to monitor the service system overall. The session will cover topics such as: how to choose critical measures to monitor, how to present data to decision makers, and how to set benchmarks and targets.

Track 4

SESSION: **Qualitative Reviews**

SPEAKER: *Marilyn Brothers, CWBH Consultants, LLC*

DESCRIPTION: This session will cover the areas of basic documentation, developing reviews for your agency, frequency of reviews, developing a good review plan and content.

Track 5

SESSION: **Wikis, Blogs, and SocialNets, Oh My!**

SPEAKER: *Shannon Howle Schelin, PhD, Director-Center for Public Technology
UNC School of Government, UNC at Chapel Hill*

DESCRIPTION: Wikis, blogs, and social networking sites are becoming more common-place in the public sector. This session will provide an overview of each type of technology, as well as offer practical applications for use within your government. Finally, we will deal with many of the legal and political implications of using such communication tools, so that you can educate your elected officials, managers, and other end users as they begin to request these types tools.

Track 6

SESSION: **Disclosing Confidential MH/DD/SA Information Pursuant to State Child Welfare Laws**

SPEAKER: *Mark F. Botts, Associate Professor of Public Law and Government
School of Government, UNC Chapel Hill*

DESCRIPTION: Learn what the three main confidentiality laws (state MH/DD/SA law, HIPAA, and 42 CFR Part 2) say about disclosing confidential client information under North Carolina laws governing (1) the reporting and investigation of child abuse and neglect, (2) guardian ad litem access to information, and (3) the sharing of information with agencies serving juveniles with a pending juvenile petition.

2:45 – 3:00 P.M.

BREAK: EXHIBITOR / VENDOR VISITATION

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

Track 1

SESSION: **Everything Providers Always Wanted to Know About Basic Reimbursement and Were Afraid to Ask**

SPEAKER: *Tom Ladenthin, Reimbursement Claims Coordinator
Western Highlands*

DESCRIPTION: This session will be an overview of Basic Reimbursement issues related to IPRS claims processing. Information will include what constitutes a clean claim, timely filing limits, accurate diagnosis codes, and a defined breakdown of the IPRS pop groups.

Track 2

SESSION: **QM 104: Impacting Performance**

SPEAKERS: *DMHDDSAS Quality Management Team*

DESCRIPTION: This session is for LME and provider staff who are responsible for initiating and implementing changes to the system. It will address how to move from monitoring critical indicators of system performance to making decisions based on trends and patterns in the data. The session will cover topics such as: how to prioritize issues to be addressed, how to ensure that changes are implemented as intended, and how to sustain changes over time.

Track 3

SESSION: **Sharing Substance Abuse Patient Records with the Court System**

SPEAKER: *Mark F. Botts, Associate Professor of Public Law and Government
School of Government, UNC Chapel Hill*

DESCRIPTION: Learn the legal requirements for sharing substance abuse patient information that is confidential under federal law (42 CFR, Part 2). Session will address the use of patient authorizations and court orders as tools for disclosing information needed by the court when ordering or monitoring substance abuse treatment, what constitutes a valid court order in both civil and criminal cases, and the limits on a court's authority to order disclosure.

Track 4

SESSION: **Securing the Enterprise: More than Just a Firewall**

SPEAKER: *Shannon Howle Schelin, PhD, Director-Center for Public Technology
UNC School of Government, UNC at Chapel Hill*

DESCRIPTION: High-quality security initiatives, designed to protect information, prevent unauthorized asset attainment, and maintain data integrity and quality, have long been the life-blood of organization survival and excellence. In recent years, our technical and financial investments in security efforts have greatly increased. However, many of the problems facing our organizations require significant management involvement and cross-departmental collaboration and coordination. This session will highlight strategies and best practices to elevate security needs to the highest levels of the organization and to engender greater success.

Track 5

SESSION: **Medicaid and VO Data from the State: LME Use Cases for Care Management, Quality Improvement, and Planning**

SPEAKERS: *Adam Holtzman, Division of MH/DD/SAS
Tim Wildfire, Wake County Human Services
Panel of LME Representatives*

DESCRIPTION: In the past year, the State has provided LMEs with Medicaid claim and VO Auths. The LME Contract with the state includes expectation for LMEs to use the data for care management, quality improvement, and planning. This session will provide a fresh overview of the data in these files, and use cases from LMEs across the state. These use cases will be presented in enough detail so the persons attending the session can replicate or adapt the methods to suit local LME needs.

4:45 – 6:10 P.M. **HOSPITALITY SUITE** – Room 331 North Tower - Sponsored by Exhibitors / Vendors
“Visit with friends”

6:15 – 7:30 P.M. **BANQUET BUFFET** - Sponsored by NC FARO
Dress: Colorful Casual

7:15 – 8:15 P.M. **Speaker:** *Shannon Howle Schelin, PhD; Director, Center for Public Technology
UNC School of Government, UNC at Chapel Hill*

Topic: All Work and No Play Makes Employees Run Away”

Description: The demand for work-life-balance solutions by employees and managers is constantly increasing. As a result, work-life-balance is a hot topic in boardrooms and workplaces today. Over the coming decade it will be one of the most important issues that working professionals will be expected to manage, both individually and organizationally. This session will offer methods to accelerate the implementation of a successful work-life strategy within your life and organization.

8:30 – 12:30 A.M. **ENTERTAINMENT** – Holiday Band
Sponsored by Exhibitors / Vendors

WEDNESDAY, APRIL 30, 2008

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

8:45 – 10:00 A.M. – BREAKOUT SESSIONS
(Choice of 5 Breakout Sessions)

Track 1

SESSION: **A Look at the Proposed 163 Monitoring Rules**

SPEAKER: *Jim Jarrard, Division of MH/DD/SAS*

DESCRIPTION: A look at the new proposed rules for SB 163 monitoring, including the new Frequency and Extent of Monitoring (FEM) grid and the other proposed monitoring tools designed as companions to the 163 monitoring processes. The session will focus on changes in the rules and the focus on the relationship to other LMEs, DMH, DMA, DHSR and other agencies in the interest of using LME resources appropriately and wisely.

Track 2

SESSION: **Comprehensive Service Provider**

SPEAKERS: *Yvonne French, Division of MH/DD/SAS*
 Mark O'Donnell, Division of MH/DD/SAS

DESCRIPTION: It has become increasingly evident that providers need the capacity to provide or have access to a continuum of services in order to adequately serve a complex array of service needs. In addition, the establishment of an infrastructure able to manage competing demands including fiscal management, regulatory requirements, training, and quality management that work together to facilitate clinically sound service provision is critical. This recognition has led to the development of a Comprehensive Service Provider framework. This session is for providers and LMEs who want to know more about the Comprehensive Service Provider.

Track 3

SESSION: **Six Sigma – Part I: Overview**

SPEAKER: *Bill Battaile, Mecklenburg Area MH/DD/SAS*

DESCRIPTION: Attendees will receive an overview of Six Sigma and the basic DMAIC process. That is the basic outline used when implementing process improvement projects (define, measure, analyze, improve, control). Also presented will be the underlying principle of controlling variation in work processes – which is where the term “Six Sigma” comes from. Quality, as a driving concept in modern business, will be discussed from a number of viewpoints (customer, cost, improvement, measuring, etc.). Also reviewed are examples of how Six Sigma can be applied to the behavioral healthcare setting and recent trends in North Carolina’s public behavioral health setting. Six Sigma makes us realize that 90%, or even 95% success in a process is not always good enough and provides a framework for reaching 99%+.

Track 4

SESSION: **Protecting Data Through Management Technology and Encryption**

SPEAKER: *Randall Bennett, Secure Enterprise*

DESCRIPTION: As your business faces sophisticated security attacks, information security practices have evolved from basic perimeter defenses to a defense-in-depth model, in which multiple countermeasures must be layered throughout your network internal and external infrastructure. Although multiplayer defenses are necessary, they increase the complexity of managing network security and make it more difficult to effectively identify and mitigate threats and meet compliance requirements. This session will provide concepts for security information management solutions that synthesizes security data from your network to more effectively identify, manage, and counter security threats to protect your data.

Track 5

SESSION: **Cultural Competence 101**

SPEAKER: *Revella Nesbit, pbH*

DESCRIPTION: This workshop will be an introduction to cultural competence. We will address its significance and its importance in the mental health field. In addition, we will introduce several concepts that are essential in the development of a culturally proficient system of care.

10:30 – 11:45 A.M. – BREAKOUT SESSIONS (Choice of 3 Breakout Sessions)

Track 1

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

DESCRIPTION: This session will provide us with an update of current issues and upcoming objectives in the ongoing Mental Health Reform process. Items such as accessing care, endorsement, ongoing audits and reviews, and strategic planning will be discussed.

Track 2

SESSION: Six Sigma – Part II: Statistics and Tools**SPEAKER:** Bill Battaile, Mecklenburg Area MH/DD/SAS

DESCRIPTION: After session one, attendees will then be introduced to statistics and tools used when a process improvement project is underway. Concepts and activities such as project management, SWOT analysis, critical thinking, business use case documents, knowledge management, product life cycle, benchmarking, knowing common team pitfalls, internal and external customers, lean manufacturing, etc. Also reviewed will be statistical and data tools that are handy when analyzing processes, including fishbone diagrams, brainstorming, Pareto charts, measurement system analysis, etc. The attendee will leave with ideas as to what tools he or she can use in their organization's next improvement process.

Track 3

SESSION: Basics of Security**SPEAKER:** Randall Bennett, Secure Enterprise

DESCRIPTION: The Basics of Security session is designed to help personnel who are not normally tasked with computer security to understand the basic concepts of computer security and the many different areas that are at risk with the different devices and potential physical security challenges. This session is excellent for people who are just starting to learn about computer security or a good refresher for the more experienced computer user.

THANKS FOR BRINGING DOOR PRIZES FROM YOUR AGENCY!

CONFERENCE REGISTRATION: Payment must be postmarked no later than April 4, 2008 to receive early conference rate. Completed registration form must accompany payment. A confirmation by email will be sent on receipt of registration and payment. Please call or email if you do not receive your confirmation to ensure you are registered.

Registration Fees:	Postmarked Early Registration by 4/4/08	Postmarked 4/5/08 – 4/21/08
FARO Members (LME/AP, Provider, DHHS) – <u>be sure you are a member</u>	\$ 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 (members/non-members) – Payment in hand only (No Banquet Ticket)		\$ 225.00

MAKE CHECK PAYABLE TO ‘NC FARO’ Mail to: **Alice Matthews** Amount to be Paid \$ _____
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Fayetteville, NC 28311

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

- | | |
|--|--|
| <input type="checkbox"/> Current Fair Labor Standards Act Compliance Issues (#1) | <input type="checkbox"/> Nip It in the Bud – How to Prevent Claim Denials from Happening |
| <input type="checkbox"/> Medicare 2008 Updates for Billing of BHS | <input type="checkbox"/> DMA Update |
| <input type="checkbox"/> FEM & Monitoring Tool: Lessons Learned So Far | <input type="checkbox"/> QM 101: Understanding What is Quality Management |
| <input type="checkbox"/> Disclosing Criminal Activity or Threatening Behavior | <input type="checkbox"/> NC-TOPPS Update |
| <input type="checkbox"/> Crystal Reporting Tips & Tricks | <input type="checkbox"/> Virtualization Deep Dive |
| <input type="checkbox"/> Job Image – Professional Savvy | <input type="checkbox"/> Leadership Needed for the Times of Change |
| <input type="checkbox"/> Current Fair Labor Standards Act Compliance Issues (#2) | <input type="checkbox"/> Has Electronic Record-Keeping Invaded the MH/DD/SAS? |
| <input type="checkbox"/> Topics of Interest to our Nonprofit Providers | <input type="checkbox"/> DMA Update, continued |
| <input type="checkbox"/> State of the Data of the State | <input type="checkbox"/> QM 102: Internal Monitoring |
| <input type="checkbox"/> Introduction to Process Mapping | <input type="checkbox"/> CAP-MR/DD Tiered Waivers |
| <input type="checkbox"/> Excel Shortcuts – Increasing Productivity | <input type="checkbox"/> Matrix Management: Moving from Silos to an Integrated Mgmt Model |
| <input type="checkbox"/> The Joy of Stress | <input type="checkbox"/> How to Turn the Community Support Service Experience into a |
| <input type="checkbox"/> Current Fair Labor Standards Act Compliance Issues (#3) | <input type="checkbox"/> IPRS Updates |
| <input type="checkbox"/> Ensuring Compliance with the Financial and Reporting... | <input type="checkbox"/> QM 103: Systems Data |
| <input type="checkbox"/> The DMH/DD/SA Records Management & Documentation | <input type="checkbox"/> Qualitative Reviews |
| <input type="checkbox"/> Process Mapping – Workflow | <input type="checkbox"/> Wikis, Blogs, and SocialNets, Oh My! |
| <input type="checkbox"/> CDW Screening Admission & Discharge Data Collection | <input type="checkbox"/> Disclosing Confidential MH/DD/SA Info Pursuant to Child Welfare ... |
| <input type="checkbox"/> Preventing Job Burnout | <input type="checkbox"/> Everything Providers Always Wanted to Know About Basic Reimb. |
| <input type="checkbox"/> Current Fair Labor Standards Act Compliance Issues (#4) | <input type="checkbox"/> QM 104: Impacting Performance |
| <input type="checkbox"/> Basic Medicaid | <input type="checkbox"/> Sharing Substance Abuse Patient Records with the Court System |
| <input type="checkbox"/> NC Practice Improvement Collaborative Update | <input type="checkbox"/> Securing the Enterprise: More than Just a Firewall |
| <input type="checkbox"/> Process Mapping – Workflow, continued | <input type="checkbox"/> Medicaid and VO Data from the State – LME Use Cases ... |
| <input type="checkbox"/> Virtualization Executive Overview | <input type="checkbox"/> A Look at the Proposed 163 Monitoring Rules |
| <input type="checkbox"/> Conflict Resolution | <input type="checkbox"/> Comprehensive Service Provider |
| <input type="checkbox"/> Finance Officers Networking | <input type="checkbox"/> Six Sigma – Part I: Overview |
| <input type="checkbox"/> Reimbursement Officers Networking | <input type="checkbox"/> Protecting Data Through Management Technology & Encryption |
| <input type="checkbox"/> Provider Networking | <input type="checkbox"/> Cultural Competence 101 |
| <input type="checkbox"/> IT Roundtable | <input type="checkbox"/> State of the State |
| <input type="checkbox"/> QM Roundtable | <input type="checkbox"/> Six Sigma – Part II: Statistics & Tools |
| <input type="checkbox"/> Consultants Roundtable | <input type="checkbox"/> Basics of Security |

(Please print all information clearly)

NAME: _____

TITLE: _____

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MEMBERSHIP STATUS: ☐ FARO **MEMBER** (LME / AP / PROVIDER / DHHS)
 (Note: check your membership status) ☐ **NON-MEMBER** (LME / AP / PROVIDER / DHHS)
☐ OTHER **NON-MEMBER**

CONFERENCE ATTENDANCE > ☐ FULL CONFERENCE (cannot split w/others)
☐ ONE DAY (☐ Mon ☐ Tue ☐ Wed) (check day)

*BANQUET RESERVATIONS > ☐ I WILL ATTEND
 (Not available for on-site registrations - ☐ I WILL NOT ATTEND
 see pages 2-3 for banquet info) ☐ I WILL NEED AN EXTRA TICKET (for spouse, friend, one day)-Enclose \$30