North Carolina FARO

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

North Carolina Finance & Reimbursement Officers Association (NC FARO)

2008
FALL CONFERENCE

October 26 – 29, 2008

REGISTRATION

AGENDA

Crowne Plaza Resort Asheville
Asheville, North Carolina

CONFERENCE INFORMATION: PLEASE READ!

__Important Registration Info__: **Payment must be received with completed registration form**. Credit cards not accepted at this time. Individuals will <u>not</u> 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. 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 October 22, 2008 (be sure to mail your registration and payment in advance to ensure receipt by this date. <u>On-site registration will be accepted – payment by check or cash</u> (see rate below for on-site registration).

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

__Registration Fees__:	Postmark Early Registration by 10/3/08	Postmark 10/4/08 – 10/20/08
FARO Member (LME/AP, Provider, DHHS) – **be sure you are a member***	$ 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 on page 3.

__Cancellation Policy__: Registration fees less a $15 administrative fee will be refunded if request is received by 5 p.m. October 7, 2008. October 8-15, 2008 refunds less a 50% cancellation fee will be honored at your request. No refunds will be made after 5 p.m. beginning October 15, 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 Fall 2008 Conference will be held at the Crowne Plaza Resort Asheville, One Resort Drive, Asheville, NC 28806. **Phone 1-800-733-3211 for reservations**. Please state that you are with **NC FARO** in order to reserve a room. A block of 225 rooms has been reserved for the NC FARO conference **on a first come first serve basis**. The room rate is $106 per room plus sales/room occupancy taxes; King Executive Suites are at $129 plus sales/room occupancy taxes. The reservation cut off date is Wednesday, September 24, 2008 or until the block of 225 is filled, so make your reservations NOW. The Hotel will accept reservations based on a space available basis at the Hotel's prevailing rates after this date. 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   <u>After</u> 4:00 PM   Check-Out Time: <u>Before</u> 11:00 AM

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@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. 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: Tossed Green Salad with Assorted Dressings, Bow Tie Pasta Salad, Herb Marinated Chicken, Pulled Pork BBQ, Hot and Mild Barbecue Sauces, Hot Vegetarian Pasta Dish, Baked Beans, Roasted Potatoes, Seasonal Vegetables, Southern Biscuits and Corn Muffins, Variety of Desserts, Coffee, Tea and Water.

Directions: 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) FALL 2008 CONFERENCE

SUNDAY, OCTOBER 26, 2008

5:00 – 7:00 P.M.   **EARLY REGISTRATION** - Laurel Registration Desk

9:00 – 11:00 P.M.   **HOSPITALITY SUITE** – Thomas Wolfe Suite, Room 220, Exhibitor/Vendor Sponsored Event
"Visit with friends and meet new FARO participants"

MONDAY, OCTOBER 27, 2008

7:00 – 7:50 A.M.   **CONTINENTAL BREAKFAST** – Mt. Mitchell Room – Exhibitor / Vendor Sponsored Event

7:15 – 8:15 A.M.   **REGISTRATION** – Laurel Registration Desk

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

VENDOR INTRODUCTIONS

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

TRACK 1

SESSION: ***Current Medicaid Audit and Oversight Environment***

SPEAKER: Mary Thornton, President & Founder, MTA

DESCRIPTION: The Deficit Reduction Act substantially changed the risk profile for health care providers and especially those who rely primarily on Medicaid funding. New auditors, new monies dedicated to Medicaid enforcement and oversight, and new concepts in Medicaid program integrity. This new business environment, which looks to be with us for the foreseeable future, requires organizations to think differently about audit risk management. This workshop will outline this new environment, suggest changes for how risk is managed internally, and push for the implementation of a compliance infrastructure in all behavioral health organizations regardless of size. The role of finance and especially the CFO will be explored and the contribution of this department to the overall compliance of the organization will be emphasized. Mary Thornton has attended a number of our FARO conferences and is a welcomed speaker. She brings a national perspective to the issues of compliance and reimbursement that helps providers see not only what is happening but what is likely to happen in the future as well.

TRACK 2

SESSION: ***The Customer is Always Right….or Something Like That?***

SPEAKER: Amigo R. Wade, Senior Attorney
Virginia Division of Legislative Services

DESCRIPTION: Providing good customer services are a goal of most government agencies. Employees are being asked more than ever to do more with less. Does customer service have to suffer? This session focuses on strategies for providing good customer service from the providers' point of view.

TRACK 3

SESSION: ***FEM Monitoring Tool***

SPEAKERS: Division Staff
Debbie Jenkins, Cumberland County LME

DESCRIPTION: The Frequency and Extent of Monitoring tool (the "FEM") is required to be used by all LMEs to determine how often to how intensely to monitor providers who are in the LMEs catchment area. This year is the first year of its required use, and this session will provide an opportunity to clarify or explain the way the instrument is designed to be used, and to discuss the experience that LMEs and providers are having in implementing the tool.

TRACK 4

SESSION: ***Crystal Reports Design 101***

SPEAKER: Rick Yeager, Programmer, Southeastern Center LME

DESCRIPTION: This session is designed for new users of Crystal Reports IX, X and XI. The target audience consists of report designers, new to Crystal Reports, who are responsible for creating and distributing reports. Attendees should have a working knowledge of Windows 2000/XP and familiarity with relational database concepts (tables, fields and records) is strongly recommended. Some of the topics that will be covered include a review of the software features, report design and the creation of presentation quality reports.

TRACK 5

SESSION: ***Disaster Recovery – Lessons Learned from Business and IT Perspective***

SPEAKERS: Jay Taylor, Pathways LME
Teresa Shirley, Pathways LME
Sandy Davis, Pathways LME

DESCRIPTION: Pathways offices were impacted by a tornado in May 2008. This caused destruction of offices, relocation of half our staff and temporary suspension of operations. This session will focus on our response to the disaster and lessons learned for future disasters. Discussion will include topics that are applicable to other LMEs and provider agencies as they develop/adjust disaster plans. Real world suggestions will be included that focus on getting functions up and running, dealing with insurance and physical plant issues, and our experience implementing a disaster plan.

TRACK 6

SESSION: ***Maximizing Revenues***

SPEAKER: Niels T. Eskelsen, MBA, CPA, Director of Business Operations
PBH

DESCRIPTION: In a structured conversation format session participants discuss the different points of the Revenue Cycle, identifying barriers and challenges in maximizing revenues from service delivery. The conversation will include how Person Centered Planning, Service Authorization, Service Delivery, Service Documentation, Claims Submission and Managing Denied claims all play an integral part in maximizing service revenues.

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

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

TRACK 1

SESSION: ***Current Medicaid Audit and Oversight Environment, continued***

SPEAKER: Mary Thornton, President & Founder, MTA

DESCRIPTION: This is a continuation of previous session.

TRACK 2

SESSION: ***Rules of Professionalism***

SPEAKER: Amigo R. Wade, Senior Attorney
Virginia Division of Legislative Services

DESCRIPTION: The professional: That employee who keeps his or her cool no matter what comes their way. How do they do it? This session will focus on some of the rules of professionalism for today's workplace.

TRACK 3

SESSION: ***Quality Management: State of the Data of the State***

SPEAKER: Shealy Thompson, Quality Management Team Leader
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: ***Crystal Reports Design 101 - continued***

SPEAKER: Rick Yeager, Programmer, Southeastern Center LME

DESCRIPTION: This session is a continuation on the creation of presentation quality reports using Crystal Reports software. Depending on time, the topics that will be covered include database filters, report grouping, multiple table joins, creating formulas and conditional formatting.

TRACK 5

SESSION: ***Developing and Implementing Policies and Procedures for your Organization***

SPEAKER: Sue Creighton, CWBH Consultants LLC

DESCRIPTION: In order to maintain endorsement and national accreditation, organizations are required to develop and implement policies and procedures to meet requirements. This presentation will begin with an overview of why are policies and procedures important to your organization and the delivery of quality services. We will review how to determine when a policy or procedure must be in writing; how to develop and write policies and procedures that meet requirements and reflect your practice; and how to train staff on your policies/procedures. The presenter has assisted in writing policies and procedures for public and private organizations for both state and national requirements and welcomes participants to share any specific questions or concerns about policies/procedures.

TRACK 6

SESSION: ***Great Beginnings***

SPEAKER: Asheville SCORE Counselor

DESCRIPTION: This seminar provides an overview of the various structural elements and issues that every business must face: the Business Plan, Record Keeping (for tax/inventory/accounting), Legal Structure and Financing the business. Any person starting a business without this knowledge may be heading for the cliff while admiring the clouds in the sky!

12:00 – 1:30 P.M.   *LUNCH ON YOUR OWN*

1:30 – 2:30 P.M. – BREAKOUT SESSIONS
(Choice of 7 Breakout Sessions)

TRACK 1

SESSION: ***Current Medicaid Audit and Oversight Environment, continued***

SPEAKER: Mary Thornton, President & Founder, MTA

DESCRIPTION: This is a continuation of previous sessions.

TRACK 2

SESSION: ***Building a Customer Service Organization***

SPEAKERS: Glenda Stokes, Division of MH/DD/SAS
Panel of speakers

DESCRIPTION: This program will discuss the key features in a customer service organization. The program addresses customer service principles, strategies and quality improvement methods that providers and LMEs can use to improve relations with internal and external customers.

TRACK 3

SESSION: ***Making Quality Management Work for Your Agency***

SPEAKERS: Sue Creighton, CWBH Consultants LLC
Jay Taylor, Pathways LME

DESCRIPTION: Session will focus on the major components of a sound Quality Management system. We will discuss the reasons why a strong Quality Management system is essential to an organizations survival. Excellent Quality Management includes agency Planning, Quality Assurance and Quality Improvement. This session will focus on specific actions in each of these areas to assist your agency in complying with external demands and maximizing your performance.

TRACK 4

SESSION: ***e-Discovery***

SPEAKER: Kara Millonzi, Assistant Professor of Public Law and Government
School of Government

DESCRIPTION: e-Discovery has become a hot topic in the past year. This session will discuss the key features of the e-discovery law, as well as help you identify the necessary steps to take to ensure compliance with the federal law.

TRACK 5

SESSION: ***Accounting, Auditing, and Tax Update***

SPEAKER: H. Wayne Terry, CPA, LarsonAllen LLP

DESCRIPTION: Update on selected accounting and audit issues including utilizing analytical procedures and benchmarks to manage your operation. In addition, we will discuss and clarify certain Internal Revenue regulations that impact proper reporting of fringe benefits, such as cell phones and vehicles.

TRACK 6

SESSION: ***For LMEs: Securing the Relationship between LME and Private Provider***

SPEAKERS: Kevin Kilgore, Citizens Insurance – A Division of Joel T. Cheatham, Inc.
Jimmy Adams, Citizens Insurance – A Division of Joel T. Cheatham, Inc.

DESCRIPTION: This session will cover the insurance relationship between Private Providers and LMEs, addressing such issues as State MOA requirements, Certificates of Insurance, Occurrence and Claims Made Forms, "Tail Coverage", Non Owned Auto Coverage, Umbrella Coverage, along with other concerns of the LMEs. Plenty of time will be allotted for Q & A's.

TRACK 7

SESSION: ***Increase Your Productivity, Not Your Hours***

SPEAKER: Asheville SCORE Counselor

DESCRIPTION: Did you know that studies have shown that working too many hours may actually reduce your productivity, not increase it! Running a successful business places demands on you that can be overwhelming, especially if you cannot control your time. The simple fact of life is that your time will be controlled by something or someone; if it's not you controlling your time, then it is some outside force. This seminar will help you identify the "time traps" in your life and give you several tactical, step-by-step techniques to master time management. Taking control of your time will free your business' productive resources and help you to achieve success.

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

3:00 – 4:30 P.M. – BREAKOUT SESSIONS
(Choice Of 7 Breakout Sessions)

TRACK 1

SESSION: ***Current Medicaid Audit and Oversight Environment, continued***

SPEAKER: Mary Thornton, President & Founder, MTA

DESCRIPTION: This is a continuation of previous sessions.

TRACK 2

SESSION: ***Identity Theft – Everyone's Nightmare***

SPEAKER: F. Scott Kennedy, Special Agent
North Carolina State Bureau of Investigation

DESCRIPTION: Join us for a session, which involves:
- What is Identity Theft?
- Who is at risk?
- How to protect your identity?
- Who are the thieves?
- How to combat identity theft and make others aware?
- How to fight to get my identity back?
- Case Review

TRACK 3

SESSION: ***Developing Effective Dashboard Reports for Performance Improvement***

SPEAKER: Niels Eskelsen, MBA, CPA, Director of Business Operations
PBH

DESCRIPTION: When performance is measured, performance improves, when performance is measured and reported; performance improves at an accelerated rate. This session focuses on a practical structure for establishing an effective dashboard report and ongoing report monitoring for behavioral healthcare organizations. Techniques can be applied to any performance improvement process.

TRACK 4

SESSION: *Data Loss Prevention*

SPEAKER: Randall Bennett, Secure Enterprise Computing, Inc.

DESCRIPTION: Recently, there has been a noticeable shift in attention and investment from not only securing the network, to securing systems within the network, but to securing the data itself. Several factors seem to be driving businesses to adopt data loss prevention (DLP) and data leakage protection solutions, including:
- Potential financial cost, operational impact, and brand damage resulting from a data breach involving sensitive customer data can be significant and often crippling to a company, its brand, or its long-term viability.
- The threat of a data loss and information leakage from insiders is on the rise.
- Companies are storing sensitive information of all types (Personal Identifiable Information [PII], Payment Card Industry [PCI] and healthcare records).
- The growing need to share data among colleagues, third-party vendors, customers, and partners.
- New markets are emerging for stolen data, which help criminals gain competitive advantage.
- The data security regulatory environment is expanding and becoming more complex.

To protect data from these types of risks, organizations must turn to the next generation of data security solutions and revamp the thought process of how data is used and shared.

TRACK 5

SESSION: *IPRS and State-Defined Services – Current Issues*

SPEAKERS: Nancy Rogers, Division of MH/DD/SAS
Cheryl McQueen, Division of MH/DD/SAS
Sandee Resnick, Division of MH/DD/SAS

DESCRIPTION: This session will focus on a discussion of the IPRS reporting requirements and limitations, minimum documentation requirements, staff requirements, and other IPRS related issues.

TRACK 6

SESSION: *For Private Providers: MOA Insurance Requirements: Does Your Agency Measure Up?*

SPEAKERS: Jimmy Adams, Citizens Insurance – A Division of Joel T. Cheatham, Inc.
Kevin Kilgore, Citizens Insurance – A Division of Joel T. Cheatham, Inc.

DESCRIPTION: This session will address the State MOA insurance requirements for Private Providers and how they can be met. Topics such as Professional Liability, General Liability, Non Owned Auto Liability, Certificates of Insurance, Additional Insured requirements, Occurrence and Claims Made Forms, "Tail Coverage", Umbrella Coverage, and other topics of interest will be discussed. Time will be allotted for a Q & A's.

TRACK 7

SESSION: *NC-TOPPS: A Tool for Change*

SPEAKERS: Deena Murphy, Ph.D., Principal Research Associate, National Development Research Institute
Marge Cawley, Ph.D., Project Director, National Development Research Institute

DESCRIPTION: The North Carolina Treatment Outcomes and Program Performance System (NC-TOPPS) is a web-based system that collects information on the life outcomes of individuals, ages 6+, receiving publicly funded mental health and substance abuse services. This interactive session is designed to facilitate participants' understanding of how NC-TOPPS can be used by multiple stakeholders to improve programs and services in the public treatment system. Attendees will learn about some new on-line tools in addition to being guided through an exercise that uses real data to demonstrate the type of reports available and potential uses of these reports and data. Attendees should leave the session with an understanding of how to frame a question, how to access the appropriate data, how to approach analysis, and how to present this data to different stakeholders. Attendees are *not* expected to have any prior data skills to participate in this session.

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

TRACK 1

SESSION: *Finance Officers Networking*

FACILITATOR: Kelly Goodfellow, The Durham Center

DESCRIPTION: Discussion of financial and operational issues that are a part of your daily challenges within your organization. Join this networking session to share your concerns and learn what others have done in similar situations. Discuss with your facilitator your training needs for the Spring 2009 Conference.

TRACK 2

SESSION: *Reimbursement Officers Networking*

FACILITATOR: Tom Ladenthin, Western Highlands

DESCRIPTION: Join your fellow peers across the state for a roundtable discussion on the many issues and challenges in reimbursement. Come ready to share your experience and learn from your peers. We would like to hear your ideas/experience with Telepsychiatry as well as other topics that might arise in the discussion. Bring your ideas for speakers and topics you would like to see at the Spring 2009 Conference.

TRACK 3

SESSION: *Provider Networking*

FACILITATOR: Richard Anderson, Executive Director, Footprints Carolina Inc.

DESCRIPTION: Join your fellow providers to discuss current issues pertinent to private providers. Share your experience and learn from others. What are your training needs for Spring 2009 conference? Do you know of topics and speakers that you would like to see on the spring agenda? Share those with your facilitator.

TRACK 4

SESSION: *Information Technology (IT) Roundtable*

FACILITATORS: George Scott, Western Highlands; Bryan Allen, East Carolina Behavioral Health

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 Spring 2009 conference? Do you know of topics and speakers that you would like to see on the agenda? Share those with your facilitator.

TRACK 5

SESSION: *Quality Management (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 Spring 2009 conference? Do you know of topics and speakers that you would like to see on the spring 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 session is specifically for consultants to have conversations about struggles and solutions within the industry.

5:30 – 6:15 P.M.   **HOSPITALITY SUITE** – Thomas Wolfe Suite, Room 220 – Exhibitor/Vendor Sponsored Event
"Visit with friends – make dining plans"

8:00 – 12:00 P.M.   **Event**: *It's A Costume Party to Honor FARO's Retirees! ! !*
Entertainment – *Westsound Band*
"Light Hors D'Oeuvres and Cash Bar"

TUESDAY, OCTOBER 28, 2008

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

7:45 – 8:30 A.M.   **REGISTRATION** – Laurel Registration Desk

---

8:30 – 10:00 A.M. – BREAKOUT SESSIONS
(Choice Of 4 Breakout Sessions)

TRACK 1

SESSION: *DMA Update*

SPEAKERS: Tara Larson, Division of Medical Assistance (DMA)
Catharine Goldsmith, Division of Medical Assistance (DMA)

DESCRIPTION: This session will provide a DMA update to include current issues, updates, and discussion of Medicaid goals for the next two years.

TRACK 2

SESSION: ***Microsoft Access Shortcuts***

SPEAKER: Tommy Harrington, President, CompuHelp

DESCRIPTION: Learn to create Tables quickly with the New Table Wizard, establish relationships between tables to eliminate work, and create queries the easy way, and produce custom reports. Take advantage of the automated features of Access to produce database programs in less time. Learn the shortcuts of data entry. Use shortcut menus to control properties and customize forms and reports. Pull information from Excel to Access to create or add to tables.

TRACK 3

SESSION: ***From Enron to YouTube: Retention, Destruction, and Production of Electronic Business Records***

SPEAKER: James Powell, JD
Womble, Carlyle, Sandridge & Rice, PLLC, Greensboro, NC

DESCRIPTION: With the explosive growth of email communications, businesses are under an enormous strain to properly manage, store, and provide for the routine destruction of electronic records. The costs of retaining electronic records are directly impacted by evolving regulatory and judicial standards. Businesses now confront new judicial rules for the production of electronic records; the obligation to place a "litigation hold" on records to prevent the routine destruction of relevant documents; and severe penalties for violation of these rules. This session includes an overview of existing standards, an examination of the impact of these standards on document retention/document destruction policies, and practical guidance for compliance with evolving standards.

TRACK 4

SESSION: ***What is the Value of your POSITION DESCRIPTIONS???***

SPEAKERS: Kim Newsom, Personnel Director, Randolph County Government
Mel Crocker, Retiree-State of North Carolina

DESCRIPTION: This session will explore the preparation and uses of Position Descriptions as it relates to managing an organization in our ever-changing environment. Management must realize how this Human Resources tool can make or break the organization. The POSITION DESCRIPTION is the foundation of how we manage a whole realm of work activities. This session will open your eyes to the many uses of the information available through the accurate and current write up of individual position duties and responsibilities and to related compliance concerns of management.

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

10:30 – 12:00 P.M. – BREAKOUT SESSIONS
(Choice of 7 Breakout Sessions)

TRACK 1

SESSION: ***CAP MR/DD Waivers***

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

DESCRIPTION: This session will include an overview of the critical elements of the two new CAP-MR/DD Waivers submitted to CMS and projected to be implemented November 1, 2008.

TRACK 2

SESSION: ***Medicare Update***

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

DESCRIPTION: Join this session to learn more about:
- How to become a Medicare Provider?
- LCD's – What does this really mean?
- What constitutes a clean claim for Medicare Part B?
- What is the Providers responsibility?

TRACK 3

SESSION: ***New LME Monitoring Tool***

SPEAKER: Mark O'Donnell, Division of MH/DD/SAS

DESCRIPTION: This session will introduce the NEW Division of MH/DD/SAS monitoring tool used by the Division when monitoring LMEs. Interact with Division staff and ask questions about the new tool.

TRACK 4

SESSION: *__Managing Your Data__*

SPEAKER: Randall Bennett, Secure Enterprises Computing, Inc.

DESCRIPTION: Organizations currently face two opposing trends in data management. Capacity requirements continue to grow almost exponentially. Meanwhile, budgets for data management are flat if not decreasing. Varrow specializes in reconciling these trends through three effective project strategies. Consolidation reduces the amount of data required to deliver crucial applications to an organization. Segmentation divides the organizational data set into discrete components that can then be separately managed and protected. Continuity and recovery increases the availability of those data sets during real world operational challenges. Varrow's real life case studies, statistical analysis, and implementation experience with these strategies will provide useful learning examples and empirical rules to benefit the data management efforts of any organization.

TRACK 5

SESSION: *__Six Sigma__*

SPEAKER: Bill Battaile, Mecklenburg County Area Mental Health

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. The tools and techniques of Six Sigma will also be reviewed (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.). 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 6

SESSION: *__From Enron to YouTube: Retention, Destruction, and Production of Electronic Business Records__*

SPEAKER: James Powell, JD
Womble, Carlyle, Sandridge & Rice, PLLC, Greensboro, NC

DESCRIPTION: This is a continuation of previous session.

TRACK 7

SESSION: *__Client Data Warehouse (CDW) Update__*

SPEAKER: Deborah Merrill, Division of MH/DD/SAS

DESCRIPTION: This session will provide review and explanation of recent changes to the Client Data Warehouse and discuss the CDW as an integrated reporting mechanism. Topics to be discussed will include: How to stay in compliance with CDW reporting requirements through Performance Contract monitoring, Collecting data for federal mandates in order to meet the expectations of the MH and SA Block Grants and National Outcome Measures, Collecting and utilizing Consumer Satisfaction data, and a Status Report of FY2008 data – are requirements/changes being met?

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: *__IPRS Simplification and County Fund Reporting__*

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

DESCRIPTION: IPRS Updates – You will want to attend this session to receive updates on IPRS including IPRS simplification and county fund reporting.

TRACK 2

SESSION: *__Medical Records 101__*

SPEAKER: Marilyn Brothers, CWBH Consultants LLC

DESCRIPTION: This will cover the basics of medical record documentation. Topics include: documentation, record reviews, tips for maintaining easily navigated records that aid in having a successful auditing/record review.

TRACK 3

SESSION: ***Implementing Cross Functional Teams:*** *A model for integrating matrix management concepts for increasing organizational effectiveness and improve cross-departmental communication, coordination and cooperation.*

SPEAKERS: Niels T. Eskelsen, MBA, CPA, PBH Director of Business Operations
David B. Jones, MA, LPA, PBH Director of Clinical Operations

DESCRIPTION: PBH started using cross-functional teams in 2006. It has been an important organizational development activity, which has increased interdepartmental communication, coordination and cooperation. When PBH prepared to operate under a managed care waiver, each department has assignments to develop the infrastructure necessary. As we began to operate under a managed care waiver, we found that the departments had developed silos, trying to optimize each department. PBH implemented cross-functional teams to improve organizational effectiveness and communication and eliminate the silo affect. Although PBH has a slightly different business model than other LMEs, the learning experience can be applied to any organization that wants to improve cross-functional performance and organization effectiveness. The Presentation Team will bring hands on experience in implementing cross-functional teams and provide live a demonstration of how it can work. Participants will be able to come away from the training with a step-by-step guide for implementing cross-functional teams in their organization.

TRACK 4

SESSION: ***Virtualization Executive Overview***

SPEAKER: Richard Swirski, Consultant

DESCRIPTION: This non-technical presentation will review many of the topics discussed earlier in the year at the Spring Conference as well as go into some of the 'Green' Advantages 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 5

SESSION: ***How to Be Audit-Proof 101 for Local Management Entities and Non-Profits***

SPEAKERS: Don McLamb, Audit Resolution Coordinator for Governmental Audits, DHHS Controller's Office
Mary Tripp, Policy Unit Leader, DMH/DD/SAS Accountability Team

DESCRIPTION: This workshop will discuss the most prevalent findings from the LMEs and non-profits based on the single audits of these agencies over the past couple of years. The implications of each findings and internal controls that can be put in place to prevent problems from recurring will be discussed. This workshop is designed for finance office staff.

TRACK 6

SESSION: ***How to Make a Plan of Correction work for you as a QI Tool***

SPEAKERS: LME and Provider Panel

DESCRIPTION: In the current environment, LMEs and Providers are faced with increasing requirements to submit Plans of Correction to address systemic problems. If organizations are going to survive, we have to be able to use Plans of Correction as opportunities to improve performance. Simply completing an external mandate without real organizational change is no longer adequate. This session will focus on developing and implementing Plans of Correction that will assist LMEs and Providers in improving performance. LME and Provider Staff will share their experience in developing and implementing Plans of Correction for performance improvement rather than simply satisfying an external mandate.

2:45 – 3:00 P.M. *BREAK: EXHIBITOR / VENDOR VISITATION – Mt. Mitchell Room*

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

TRACK 1

SESSION: ***Reimbursement Roundtable (Q & A)***

SPEAKERS: Cheryl McQueen, Division of MH/DD/SAS
Eric Johnson, Division of MH/DD/SAS
Kelly Goodfellow, The Durham Center
Tom Ladenthin, Western Highlands
Tim Wildfire, Wake County Human Services
Inga Shaw, PBH

DESCRIPTION: Join us with your IPRS billing, payment, and contract questions. This session will allow providers to ask questions from the floor to a panel consisting of DHHS staff, LME Finance, Reimbursement, and IT staff, which have expertise of the billing, payments, and contract processes through the LME.

TRACK 2

SESSION: *__Implementing Cross Functional Teams, continued__*

SPEAKERS: Niels T. Eskelsen, MBA, CPA, PBH Director of Business Operations
David B. Jones, MA, LPA, PBH Director of Clinical Operations

DESCRIPTION: This is a continuation of previous session.

TRACK 3

SESSION: *__Virtualization – Plotting the Course__*

SPEAKER: Richard Swirski, Consultant

DESCRIPTION: Considering Virtualization in your environment (most people are). This session will help identify some Lessons Learned, Best Practices, and tricks of the trade. Although the session will go into technical concepts, the 'gory details' will not be included. The focus of the presentation will be VMWare, but solutions from Sun, IBM, Microsoft, Novell and RedHat will be briefly discussed.

TRACK 4

SESSION: *__Do You Really Know What Your Finance Statement Is Telling You?__*

SPEAKER: Asheville Score Counselor

DESCRIPTION: Each Statement tells you something different. The question is…are you reading the right one for the right information? It's good to know your debt-to-equity ratio, but what does it mean? Can you analyze and interpret key financial data in a meaningful way? Examine the importance of the cash flow statement and find out what this document reveals. Uncover important strategies and tools that can make your company more successful.

TRACK 5

SESSION: *__Segregation of Duties: Where are your Controls?__*

SPEAKER: Natasha McKenzie, Staff Attorney
PBH

DESCRIPTION: Does your agency have a proper segregation of duties? Come to hear issues surrounding one of the more important internal control activities a governmental entity should employ. Solutions will be provided to achieve a good balance on segregating duties, even when resources prevent striking that perfect balance.

TRACK 6

SESSION: *__Standardization of the Local Provider Monitoring Process__*

SPEAKERS: Debbie Jenkins, Cumberland County LME
Susan Corriher, Southeastern Center LME
Jamie Maginnes, DMH/DD/SAS Accountability Team Policy Unit

DESCRIPTION: This workshop will provide an overview of the standardized provider monitoring tool, which will be implemented statewide beginning in January 2009. This tool will be used by all LMEs for SB 163 monitoring. Feedback from pilot testing of the tool and inter-rater reliability testing of the tool will also be discussed.

4:45 – 6:10 P.M.	**HOSPITALITY SUITE** – Thomas Wolfe Suite, Room 220 – Sponsored by Exhibitors/Vendors
	"Visit with friends"
6:15 – 7:00 P.M.	**DINNER** – Pilot / Pisgah / Roan – Sponsored by NC FARO
	Dress: Casual Business
6:45 – 7:45 P.M.	*Speaker: __Jackie Pelletier__ – A voice that launched a thousand hearts. Jackie teaches audiences to laugh at, inspire, be accountable to and focus themselves.*
7:45 – 8:15 P.M.	*Announcements: 2009 FARO Officers, Outstanding Service Award, Door Prizes*
8:30 – 12:30 A.M.	**ENTERTAINMENT** – *GrooveTown Band*
	Pilot / Pisgah / Roan – Sponsored by Exhibitors/Vendors

WEDNESDAY, OCTOBER 29, 2008

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

8:45 – 10:15 A.M. – BREAKOUT SESSIONS
(Choice of 5 Breakout Sessions)

TRACK 1

SESSION: ***Building an Ethical Organization – Leadership Issues***

SPEAKER: Carol Rovello, SPHR
President, Strategic Workplace Solutions, LLC

DESCRIPTION: Headlines scream about one business scandal after another, but creating an organization where leaders and employees collectively aspire to meet high ethical standards is possible. When organizations and ethics collide, leaders often find themselves right in the middle. This program will help you to be more proactive – helping your organization to treat ethics as a business imperative. You will define ethics and discuss strategies for creating an organizational culture that demands ethical behavior.

TRACK 2

SESSION: ***Quality Management : QI Projects, Making Good Better***

SPEAKERS: Maria Fernandez, DMHDDSA QM Team
Shealy Thompson, Division of MH/DD/SAS

DESCRIPTION: As providers and LMEs pursue QI projects, there are several recommended components and processes that are helpful in ensuring success. Session outlines general guidelines for what makes a successful QI Project and will review examples from 07-08 LME QI Projects as examples of successful projects. Discussion also includes topics that providers/LMEs may consider to conduct QI Projects around, pitfalls to avoid, importance of pre/post-intervention data management and how to report out on QI Projects.

TRACK 3

SESSION: ***Accounting for Non-Accountants***

SPEAKER: Asheville SCORE Counselor

DESCRIPTION: The success of your business depends upon your ability to understand and apply accounting principles. By the end of this seminar you will have sufficient working knowledge of basic accounting skills that you can apply to your business right away. You will learn:
- To understand the basic theory of accounting
- How to speak and understand the accounting vocabulary
- How to keep accurate records…and do it easily
- How to read and understand the three basic and essential financial documents you need (Income Statement, Cash Flow Statement, Balance Sheet)

TRACK 4

SESSION: ***If a Disaster Strikes, How Will I be able to Access My Information?***

SPEAKER: Cyrus Hurley, MCSA MCSE2003 CHP CHSS Sec+ VCO on VI3
Director of Information Technology
County of Ashe

DESCRIPTION: We take for granted that when we push the button on our PC's that our agency information is going to be available. If something were to happen to your organizations IT Infrastructure and you lost your servers and your data what would you do? How long could you operate without your information? This session will help you understand what a hosting service is and how it has become an information insurance policy. What services do they provide, what should I ask for, where do I find one and how do they work? These questions and others will be addressed in this interactive session.

TRACK 5

SESSION: ***The SBI and White Collar Crime***

SPEAKER: R. Lawrence Young, Special Agent
Financial Crime Investigations Unit, SBI

DESCRIPTION: Learn how the SBI investigates White Collar Crime cases, including factors involved in the commission of these crimes and real life case overviews.

10:15 – 10:30   *BREAK: Mt. Mitchell Room*

TRACK 1

SESSION: *Report from Raleigh*

SPEAKER: Jim Jarrard
Division of MH/DD/SAS

DESCRIPTION: This session will address those policy and implementation issues, which are most current, from the Division management perspective. These may include ongoing implementation of legislation from the 2008 session, the status of current legislative proposals, collaboration with LMEs and the provider community in improving services to persons with disabilities, and other issues.

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

"THANK YOU FOR BRINGING DOOR PRIZES REPRESENTING YOUR AGENCY"

**NC FARO
2009 SPRING CONFERENCE**

April 26 – 29, 2009

**Hilton Wilmington Riverside
Wilmington, NC
Phone: 910-763-5900**

*** *MAKE YOUR RESERVATION EARLY TO ENSURE ROOM AT HILTON* ***

IT'S A COSTUME PARTY TO HONOR FARO'S RETIREES

Lets all be famous,
just for one night;
come in your costume,
to scare or delight!

It can be sweet or scary,
ghost or fairy, or even
your favorite fan gear for a night!

It doesn't have to be expensive,
visit your thrift shop and watch
treasures unfold!

NC FARO invites you to a
hauntingly good time

Monday, October 27, 2008
8:00 pm to 12:00 pm

Featuring Westsound Band
Light HORS DOEUVRES and Cash Bar

Please join in our fun and wear a costume
or you'll scare us all to death!

"We do not stop playing because we grow old,
we grow old because we stop playing"

CONFERENCE REGISTRATION: *Payment must be postmarked no later than October 3, 2008 to receive early conference rate*. Completed registration form must accompany payment. A confirmation by email will be sent on receipt of <u>registration</u> and <u>payment</u>. Please call or email if you do not receive your confirmation to ensure you are registered for conference.

Registration Fees:	Postmark Early Registration by 10/3/08	Postmark 10/4/08 – 10/20/08
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 (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 $ _____**
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.

___Current Medicaid Audit & Oversight Environment
___The Customer is Always Right….or Something Like That?
___FEM Monitoring Tool
___Crystal Reports Design 101
___Disaster Recovery – Lessons Learned
___Maximizing Revenues
___Current Medicaid Audit & Oversight Environment, cont.
___Rules of Professionalism
___QM: State of the Data of the State
___Crystal Reports Design 101, continued
___Developing & Implementing Policies & Procedures for Your Org.
___Great Beginnings
___Current Medicaid Audit & Oversight Environment, cont.
___Building a Customer Service Organization
___Making Quality Management Work for Your Agency
___e-Discovery
___Accounting, Auditing, and Tax Update
___For LMEs: Securing the Relationship between LME & Provider
___Increase Your Productivity, Not Your Hours
___Current Medicaid Audit & Oversight Environment, cont.
___Identity Theft – Everyone's Nightmare
___Developing Effective Dashboard Reports for Performance…
___Data Loss Prevention
___IPRS and State-Defined Services-Current Issues
___For Providers: MOA Insurance Requirements-Does Your …
___NC-TOPPS: A Tool for Change
___Finance Officers Networking
___Reimbursement Officers Networking
___Provider Networking
___Information Technology (IT) Roundtable
___Quality Management (QM) Roundtable
___Consultants Roundtable

___DMA Update
___Microsoft Access Shortcuts
___From Enron to YouTube: Retention, Destruction….
___What is the Value of Your POSITION DESCRIPTION?
___CAP MR/DD Waivers
___Medicare Update
___New LME Monitoring Tool
___Managing Your Data
___Six Sigma
___From Enron to YouTube: Retention, Destruction…cont.
___Client Data Warehouse (CDW) Update
___IPRS Simplification and County Fund Reporting
___Medical Records 101
___Implementing Cross Functional Teams
___Virtualization Executive Overview
___How to Be Audit-Proof 101 for LME and Non-Profits?
___How to make a Plan of Correction Work for you as a QI tool?
___Reimbursement Roundtable (Q & A)
___Implementing Cross Functional Teams, continued
___Virtualization – Plotting the Course
___Do You Really Know What Your Finance Statement is Telling You?
___Segregation of Duties: Where are Your Controls?
___Standardization of the Local Provider Monitoring Process
___Building an Ethical Organization – Leadership Issues
___QM: QI Projects, Making Good Better
___Accounting for Non-Accountants
___If a Disaster Strikes, How Will I Be Able to Access My Information?
___The SBI and White Collar Crime
___Report from Raleigh

(Please print all information clearly)
NAME:_____

TITLE:_____

AGENCY:_____

MAILING ADDRESS: _____

        CITY: _____STATE:_____ZIP CODE:_____

PHONE: _____E-MAIL:_____

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
                 ___ONE DAY (__Mon __Tue __Wed) (check day)

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