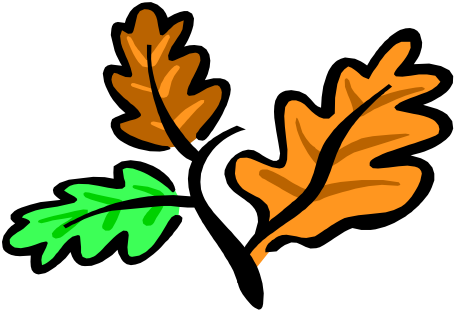




North Carolina Finance & Reimbursement Officers Association



NC FARO 2009 Fall Conference

November 1 – 4, 2009

REGISTRATION AGENDA

Crowne Plaza Resort Asheville
Asheville, North Carolina

NC FARO Fall 2009 Conference
November 1- 4, 2009
Asheville, NC

CONFERENCE INFORMATION: PLEASE READ!

Session Info: All sessions are open to both LME and Provider; however, some sessions may lean heavier on the LME side and some sessions may lean heavier toward the Provider side. We feel that it is important, whether you are a LME or a Provider, to participate in as many sessions as possible to help understand the functions that are interrelated among agencies.

Important Registration Info:

- **Payment must be received with completed registration form.** Individuals will not be registered for conference until payment is made.
- **Early Registration and payment must be postmarked by 10/9/09.**
- 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 registration with payment (except Early Registration indicated above) must be **“received” by noon on October 28, 2009** (be sure to mail your registration and payment in advance to ensure receipt by this date).
- On-site registration will be available at conference – payment by check or cash (see rates below for on-site registration).
- There will be a \$25 returned check fee.

On-line Registration:

- On-line registration will be available on NC FARO website at www.ncfaro.org; however, payment must be submitted by mail.
- Follow on-line instructions to register.
- To receive Early Registration rate, your payment must be postmarked by 10/9/09.
- Mailed registrations / payments (other than early registration/payment) **MUST** be received by October 28, 2009.

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 10/9/09	Postmarked 10/10/09-10/26/09
FARO Member (LME/AP, Provider, DHHS) – be sure you are a “2009” 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
	<u>On-site Rates 10/27/09-11/4/09</u>	
<u>On-site “Full” Registration (member or non-member) – Payment in hand only.</u>	\$ 225.00	
<u>On-site “One-Day” Registration (member or non-member) – Payment in hand only.</u>	\$ 125.00	

*If you are unsure as to your “2009” membership status, please contact the membership committee member listed before registering.

Cancellation Policy:

- Registration fees less a \$15 administrative fee will be refunded if request is received by 5 p.m. October 9, 2009.
- October 10-23, 2009 refunds less a 50% cancellation fee will be honored at your request. No requests for refunds will be accepted after 5 p.m. beginning October 23, 2009.
- To discuss a cancellation, contact Alice Matthews by e-mail at abmcms@aol.com or at 910-488-5170.

Hotel Information:

- The NC FARO Fall 2009 Conference will be held at the Crowne Plaza Resort, One Resort Drive, Asheville, NC 28806.
- **Phone 1-800-733-3211 or 1-828-254-3211 for reservation and mention the group name NC FARO 2009.** A block of 225 rooms has been reserved for the NC FARO conference **on a first come first reserved basis.**
- The room rate is \$109 per room plus sales/room occupancy taxes. King Executive Suites are at \$139 plus sales/room occupancy taxes.
- The reservation cut off date is Wednesday, September 30, 2009 or until the block of 225 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. Guest room check-in/Check-out time is as follows:
Check-in Time 4:00 PM Checkout Time: 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	919-218-7284
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
NC FARO 2009 President:	Jay Taylor	jtaylor@pathmhdds.org	704-842-6480

Additional Information: Should you need additional registration information, forms, or agenda, they are available on our website at www.ncfaro.org. We encourage you to forward the agenda to others who you feel may benefit from this training; i.e., others within your agency, contract providers, etc. You may e-mail or make copies of the registration packets to forward. All updates concerning the conference (i.e., agenda changes, weather) will also be posted on our website.

TUESDAY EVENING EVENTS:

- **Back by popular demand – Heavy HORS d’OEUVRES will be served from 7:00 – 8:30 p.m.**
- **7:00 – 8:30 pm – Retiree Reception – stop by to honor those who have retired, visit with friends and associates.**
- **8:30 – 12:30 am – Entertainment provided by Westsound Band.**

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)
FALL 2009 CONFERENCE**

SUNDAY, NOVEMBER 1, 2009

- 5:00 – 7:00 P.M. **EARLY REGISTRATION** - Laurel Registration Desk
- 8:30 – 11:00 P.M. **HOSPITALITY SUITE** – Thomas Wolfe Suite, Room 220, Exhibitor/Vendor Sponsored Event
"Visit with friends and meet new FARO participants"

MONDAY, NOVEMBER 2, 2009

- 7:15 – 8:45 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**
Jay Taylor, 2009 NC FARO President, Pathways LME
VENDOR INTRODUCTIONS

9:00 – 10:15 A.M. JOINT SESSION

KEYNOTE ADDRESS

Balancing Life with Humor and Motivation

Iwana Ridgill, Ph.D.

This program focuses on reminding us how important attitude is in dealing with the everyday stresses of balancing our jobs, home life, and the myriad of details that sometimes threaten to overwhelm us. Presentation includes warning signs of lack of positive attitude and sense of humor; benefits of laughter, humor and self-motivation; attitude and its impact on our physical and emotional state; suggestions and tips for maintaining a healthy balance in our view of life and of ourselves.

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: **Provider Monitoring**

SPEAKERS: Jamie Maginnes, Division of MH/DD/SAS Accountability Team
Debbie Jenkins, Cumberland County LME

DESCRIPTION: The Provider Monitoring Tool was developed to standardize local provider monitoring conducted by LMEs. In January 2009, the tool was implemented statewide. This session will provide an overview of the tool as well as updates on recent developments and lessons learned as the tool has been implemented.

TRACK 2

SESSION: **Responding to Law Enforcement Requests for Client Information**

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

DESCRIPTION: Have you ever been in the awkward position of telling a uniformed officer that you cannot cooperate by disclosing requested information? The HIPAA Privacy Rule, state confidentiality law, and the federal regulations governing substance abuse patient records have different requirements on how to handle law enforcement officer requests for confidential information. Session participants will learn which laws apply to them and how to respond to law enforcement requests for information, including search warrants for records and arrest warrants for patients.

TRACK 3

SESSION: **Update on IRIS: Our New DHHS Incident Reporting System**

SPEAKER: Candy Helms, IRIS Project Manager, Quality Management Consultant
CPM Section, Division of MH/DD/SAS

DESCRIPTION: This session will cover what has been learned about the new system, IRIS, since going live October 5. A question and answer session will follow.

TRACK 4

SESSION: **CDW / IPRS**

SPEAKERS: Deborah Merrill, Division of MH/DD/SAS; Judy Boone, Division of MH/DD/SAS, Jeannette Barham, Division of MH/DD/SAS, Cheryl McQueen, Division of MH/DD/SAS, Thelma Hayter, Division of MH/DD/SAS

DESCRIPTION: The CDW session will provide updates on the CDW reporting requirements, discussions of Performance Contract monitoring, and a brief review of the physical health questions collected as part of the consumer perception of care 2008 survey. Additionally there will be a report on reports that the LMEs may access. The IPRS section will provide updates surrounding any changes to the IPRS system.

TRACK 5

SESSION: **Records Retention: An Overview of What You Should Know**

SPEAKER: Cynthia Allen Coe, RHIA, Accountability Specialist
NC Division of MH/DD/SAS

DESCRIPTION: With the future reported closing of Level III/Level IV group homes and the ending of Community Support services, it is imperative to provide technical assistance on the retention and disposition of records maintained by provider agencies. This is a 1 ½ hour presentation to aid LMEs and providers in the efficient creation, maintenance, disposal, or preservation of their records and to provide guidance on administering records management in accordance with General Statutes 121 and 132 and the mandate provided in these laws.

TRACK 6

SESSION: **Perfection IS in the Eye of the Beholder**

SPEAKER: Nikki Migas, Managing Director Behavioral Health
CARF, International

DESCRIPTION: "Perfection IS in the eye of the beholder ... especially when the beholder is the CARF surveyor". So you thought your organization was perfect before the survey, and then you heard the survey team utter those dreaded three words, "You have recommendations!" This session will identify the most frequently missed CARF standards specific to North Carolina providers that have been surveyed over the past two years. Examples of methods to demonstrate conformance will be discussed, and attendees will be provided an opportunity to pose questions regarding difficult standards.

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: **Breaches Not Breeches: You May Notice Me If I Wear Knee-Length Trousers, But Will You Give Me Notice When My Privacy is Breached?**

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

DESCRIPTION: The federal rules on breach notification are now out! Congress amended HIPAA on February 17, 2009, by requiring covered entities to notify patients when a breach of privacy occurs. Congress also required U.S. HHS, by August 17, 2009, to enact regulations implementing the requirements. Session participants will learn about the new regulations, including what kinds of breaches require notification, what the notice must say, and who, in addition to the patient, must be notified. Participants wearing breeches (knee length trousers tapered to fit closely) get extra credit. However, participants acting too big for their breeches will be called upon to contribute their alleged knowledge of the subject.

TRACK 2

SESSION: **QI Projects**

SPEAKERS: Maria Fernandez, Division of MH/DD/SAS
Kris Booker, Western Highlands
Don Herring, Western Highlands
Steve Legeay, Western Highlands
Christy H. Pruess, MA, LPC, Smoky Mountain Center
Provider Representatives

DESCRIPTION: This session will focus on recommended components and processes that are essential in conducting QI projects. The presenters will describe general guidelines in ensuring successful QI projects, pitfalls to avoid, the importance of pre and post intervention data, and how to report on QI projects. LME and provider representatives will report on their QI projects.

TRACK 3

SESSION: *e-Discovery*

SPEAKER: Kara Millonzi, Assistant Professor of Public Law and Government
School of Government, The University of North Carolina at Chapel Hill

DESCRIPTION: 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. This has become a "hot topic" for the LMEs and Provider agencies.

TRACK 4

SESSION: *Customer Satisfaction Survey*

SPEAKERS: Deborah Merrill, Division of MH/DD/SAS; Judy Boone, Division of MH/DD/SAS, Jeannette Barham, Division of MH/DD/SAS

DESCRIPTION: The Consumer Perception of Care Survey session will provide the opportunity for the LMEs to give feedback on the newly implemented survey process. Additionally, there will be a review of survey results from 2008 and how to access the survey reports.

TRACK 5

SESSION: *The times, they are a'changin: Dealing with a Climate of Change*

SPEAKER: Iwana Ridgill, Ph.D., Adjunct Faculty Member
Midlands Technical College, Columbia, SC

DESCRIPTION: This session will identify the effects of change on individuals and organizations; recognize typical reactions to change; define the stages of change in organizations; and incorporate strategies for handling change productively for ourselves and those we influence and lead.

TRACK 6

SESSION: *Critical Role of CFO's in a Financial Turnaround*

SPEAKER: Niels Eskelsen, Director of Business Operations, pbH

DESCRIPTION: CFO's on management teams play an integral role in steering their organizations through difficult financial times. There are four roles that are critical for CFO's to own in order for organizations to experience a successful financial turnaround. This session will discuss: Collections and cash management, Understanding and controlling cost, Revenue drivers, competing within your market and market position and strategic planning.

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: *Contract Determination – Financial Assistance (FA) versus Purchases of Services (POS)*

SPEAKER: Don McLamb, DHHS Controller's Office

DESCRIPTION: Federal and State laws require that federal, state or local government entities and nongovernmental agencies provide guidance in determining whether payments made to subrecipients / vendors constitute a Federal award or "financial assistance" (FA) or a payment for goods and services or "purchase of services" (POS). The purpose of this requirement is to determine whether or not financial reporting requirements apply to such payments. This workshop will explain the process, also known as "Contract Determination", and the responsibilities of both the awarding agency and the recipient of such payments. Come and learn how this process helps to ensure that public funds are spent as intended and the importance of performing this exercise on each and every contractual relationship.

TRACK 2

SESSION: *QI Projects, continued*

SPEAKERS: Maria Fernandez, Division of MH/DD/SAS
Kris Booker, Western Highlands
Don Herring, Western Highlands
Steve Legeay, Western Highlands
Christy H. Pruess, MA, LPC, Smoky Mountain Center
Provider Representatives

DESCRIPTION: This will be a continuation of the previous session.

TRACK 3

SESSION: *Microsoft Office SharePoint*

SPEAKER: Peter Cregger, Applications Development Manager, City of Greenville

DESCRIPTION: Microsoft Office SharePoint is an integrated suite of applications that can help improve organizational effectiveness by providing comprehensive content management and search capability, increase productivity, document sharing and versioning, and facilitating information sharing across departments. Teams can share and review documents in a collaborative environment. As an Intranet platform, you can use it as an employee bulletin board for messages or to list agency links, phone numbers, employee birthdays and self maintain lists of common business data. The issues many agencies face are “Just exactly what is SharePoint?”, “What can it do for us?”, and “What does it take to implement this solution?” In 2008, the City of Greenville embarked on delivering a City-wide SharePoint solution. From infrastructure design, configuration, training, support, and application development – the City’s IT team pulled together to deliver SharePoint for the City. This session is designed to give you a roadmap of the SharePoint basics, plus share our agency’s experiences.

TRACK 4

SESSION: *Improving Performance Indicators*

SPEAKERS: Jay Taylor, Pathways LME
Anna North, Eastpointe
Debbie Jenkins, Cumberland County LME
Glenn Buck, Port Human Services

DESCRIPTION: Ever wonder how your organization can better measure performance indicators? Want to know how your organization can improve these measurements? This session will focus on the performance indicators from the Community Systems Progress Report related to Timely Initiation and Engagement of consumers into services. A panel of LME representatives will lead a discussion around what is measured, how it’s measured, and potential improvements in methodology. The panel will also have a discussion with the audience about the barriers to measuring these performance indicators and brainstorm potential solutions to barriers. This session is targeted towards LME staff and providers in order to better understand the role that each plays in improving these performance indicators.

TRACK 5

SESSION: *Mental Health and Substance Abuse Services Offered to our Veterans*

SPEAKER: Judi Swayne, LCSW, LCAS, Substance Abuse Residential Rehabilitation Program Coordinator
Asheville VA Medical Center

DESCRIPTION: This session will cover who is eligible, how you can assess the services, types of services that are offered to our Veterans – inpatient and outpatient and how to contact persons within VA.

TRACK 6

SESSION: *Being Audit Ready all the Time*

SPEAKER: Marilyn Brothers, Consultant, CWBH Consultants LLC

DESCRIPTION: This session will address how to be audit ready. Discussion will address topics such as: What types of systems does my agency need to have in place to be audit ready all the time? How often should my agency be performing audits? What types of audits should my agency be performing? How does staff training play into being audit ready? Although audits are not revenue producing, they can be revenue preserving.

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

TRACK 1

SESSION: *Finance Officers Networking*

FACILITATOR: Tommy Scott, Sandhills 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 2010 Conference.

TRACK 2

SESSION: *Reimbursement Officers Networking*

FACILITATOR: Terry Boyette, Eastpointe

DESCRIPTION: Come and meet with your peers to discuss current issues that relate to reimbursement. Participate in an open discussion on concerns and issues that reimbursement staff face daily and learn how others may have responded to similar situations. Discuss with your facilitator reimbursement training needs you feel would be helpful at the Spring 2010 conference.

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 experience and learn from others. What are your training needs for Spring 2010 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*

FACILITATOR: George Scott, IT Director, Western Highlands

DESCRIPTION: Join in this roundtable discussion on the many issues facing IT Directors and 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 2010 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: Kim Keehn, ECBH

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 2010 conference? Do you know of topics and speakers that you would like to see on the spring agenda? Share those with your facilitator.

8:30 – 10:30 P.M.

HOSPITALITY SUITE – Thomas Wolfe Suite, Room 220 – Exhibitor/Vendor Sponsored Event
“Visit with friends and associates”

TUESDAY, NOVEMBER 3, 2009

7:30 – 9:00 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 6 Breakout Sessions)

TRACK 1

SESSION: *Valuing Differences*

SPEAKER: Tracy T. Mambrino, PHR, Manager, Training & Assessments
The Employers Association

DESCRIPTION: In this session you will learn to identify ways to work effectively with peers, subordinates and managers; understand ways to foster and influence relationships; and learn how to respond to differences in the workplace. As the world becomes more globally connected, wise employers take proactive steps to enhance working relationships, foster the inclusion of all people and demonstrate a commitment to value diversity. The key areas that influence how we respond are based on our knowledge, understanding, acceptance and behavior. Learn about the value of understanding differences and strategies to help team members and managers work together effectively.

TRACK 2

SESSION: *Business and Professional Ethics - “Why Don’t We Just Do What’s Right?”*

SPEAKER: Wayne Terry, CPA, LarsonAllen LLP

DESCRIPTION: It seems like every time you pick up a newspaper, listen or watch the news on radio or TV, business ethics are being discussed. Madoff, Healthsouth, and maybe even a few of our own federal and state politicians get caught up in these situations. Will it ever end? Join in a discussion of some of these cases and how external and internal factors are driving these situations to the forefront of our society.

TRACK 3

SESSION: **Outcomes Reporting: How to Define Outcomes and How to Use the Data**

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

DESCRIPTION: "Outcomes" is an often-used word, but often outcomes are either ignored, or treated as an administrative burden. How do we define outcomes, and which ones are important? How do we use outcomes, and how can they add value to our organizations? In this session we will identify sources for outcome measures, how to prioritize them. We will also discuss how to use them in the performance improvement process. We will use actual examples of how outcome measures have driven process improvement in administrative and clinical functions.

TRACK 4

SESSION: **Excel 2007 Basic Shortcuts**

SPEAKER: Tommy Harrington, President, CompuHELP

DESCRIPTION: Instruction on the new features of Excel 2007 will get any user off to a fast start. Learn features and techniques that will increase productivity of all Excel users, Shortcuts, shortcuts, and more shortcuts!

TRACK 5

SESSION: **Leading in Times of Transition and Change**

SPEAKER: Mel Crocker, Retiree, State of North Carolina

DESCRIPTION: What should managers focus on when dealing with programmatic changes, standards, revisions, economic downturns, budgeting and funding shortfalls or organizational and cultural changes? This session is designed to address leadership processes and responsibilities during times of difficult changes and will incorporate a format where participants can share their experiences. We will discuss positive and negative results with emphasis on the lessons learned. Come and share!!!

TRACK 6

SESSION: **Medicaid – How Well Do You Know It?**

SPEAKER: Bert Bennett, Ph.D., Clinical Policy, Behavioral Health Section, Division of Medical Assistance (DMA)

DESCRIPTION: This session will provide a general overview on the basics of billing Medicaid utilizing the September 2009 Basic Medicaid Billing Guide.

10:00 – 10:30 A.M.

BREAK: EXHIBITOR / VENDOR VISITATION – Mt. Mitchell Room

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

TRACK 1

SESSION: **Compliance Update**

SPEAKER: Jim Burke, Local Government Commission

DESCRIPTION: This presentation will be a review of compliance auditing requirements with a focus on changes implemented in the last year and a review of issues noted during the 2008 fiscal year. Changes in the single audit process including changes in the OMB Compliance Supplements will be reviewed.

TRACK 2

SESSION: **Medicare – Covering Both the Basics and Current Updates**

SPEAKER: Deanna H. Menshew, Provider Outreach & Education Senior Analyst
CIGNA Government Services, Nashville, TN

DESCRIPTION: This session will cover Basic Medicare requirements to include participating and non-participating enrollments, claims submissions, Local Medical Review Policies. Also updates to the Medicare system will be covered at this session. This session is for any service delivery agency who currently provides services or may in the future provide services to Medicare beneficiaries.

TRACK 3

SESSION: **How to Conduct a Change Cycle!**

SPEAKER: Glenn Buck, MSW, LCAS, Chief Clinical Officer, PORT Human Services

DESCRIPTION: In this session you will learn the steps to conducting a change cycle, to identify business process barriers and determine and implement rapid-cycle changes to improve your business process.

TRACK 4

SESSION: *Excel 2007 Data Commands*

SPEAKER: Tommy Harrington, President, CompuHELP

DESCRIPTION: Become an expert on the Data Commands—Sort, Validation, Filter, Subtotals, PivotTables, and the new Table command. You'll be amazed at all Excel's features for summarizing accounting, production, and management information.

TRACK 5

SESSION: *Crystal Ball or Business Strategy? Succession Planning for Your Organization – Are You Prepared for the Future?*

SPEAKER: Tracy T. Mambrino, PHR, Manager, Training & Assessments
The Employers Association

DESCRIPTION: In this session you will learn the definition of succession planning, understand the role succession planning can play in your organization and tips for successful implementation. Do you want to be ahead of your competitors or behind? Don't wait until your organization is in a crisis to start succession planning, because it may be too late. Organizations that manage the development of their high performers are ready to move forward for tomorrow's business environment. Come learn how succession planning can create a motivated and capable group of employees that are ready to assume key roles within the company.

TRACK 6

SESSION: *Starting a Cultural Competence Initiative: Systemic, Community & Individual Perspectives*

SPEAKER: Revella H. Nesbitt, M.Ed., LPC
Community Relations Manager and Cultural Competence Coordinator, pbH

DESCRIPTION: Cultural Competence has been a term that is becoming increasingly common. However, what it means to have a mental health cultural competence initiative has been elusive. This session will bring clarity and identify specific steps when starting an agency wide culture competence initiative.

12:00 – 1:30 P.M. *LUNCH ON YOUR OWN*

12:00 – 1:30 P.M. **Consultants Roundtable:** Informal lunch meeting with consultants across the state to discuss resource sharing, standards of practice, and increased collaboration. This will be a facilitated discussion with participant interaction. The group will meet in the hotel's restaurant (each person will be responsible for their own meal).

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

TRACK 1

SESSION: *LGC (Local Government Commission) Update*

SPEAKER: Jim Burke, Local Government Commission

DESCRIPTION: This presentation will be an overview of changes in the last year in governmental accounting and related issues in North Carolina. Areas covered will include legislative changes, new GASB statements, and overview of auditing issues noted during the 2008 fiscal year, and a review of current projects.

TRACK 2

SESSION: *Non-Medicaid Appeals*

SPEAKER: David Jones, Director of Clinical Operations, pbH

DESCRIPTION: This session will focus on notifications, documentation, timelines and the steps to follow in preparation and implementation of the Non-Medicaid Appeals Process. We will cover the LME responsibilities and local process in reconsideration of a denial, reduction, suspension or termination of a Non-Medicaid Service.

TRACK 3

SESSION: *CSC Update*

SPEAKERS: Gary Fuquay, CSC
Cheryl McQueen, Division of MH/DD/SAS

DESCRIPTION: OMMISS, DMA, DMH, and DPH are working on a joint project to replace the MMIS+ and IPRS claims payment systems. This new system will provide state-of-the-art claims entry and processing capabilities and will be a multi-payer system. This session will provide an update on this project. Gary Fuquay of CSC and Cheryl McQueen of DMH will present an overview of the project status with emphasis on issues of interest to DMH/DD/SAS.

TRACK 4

SESSION: **Excel 2007 Functions for Automating Reports**

SPEAKER: Tommy Harrington, President, CompuHELP

DESCRIPTION: You will learn techniques to automate repetitive reports, and create management and government reports whenever new data is simply entered or imported. You will learn to use Excel 2007's new functions—SUMIFS, COUNTIFS, and IFERROR. Learn tips and shortcuts to save hours each week.

TRACK 5

SESSION: **How to Develop & Implement Risk Management and Corporate Compliance Plans**

SPEAKERS: Gayle Mahl, Director of Operations, Pathways LME
Beth Brown, RHIT, CCS-P, Claims Billing and Compliance Manager, Pathways LME

DESCRIPTION: This session will provide you with examples and implementation processes for risk management and corporate compliance plans to assist with maintaining a risk free environment.

TRACK 6

SESSION: **Developing an Agency Specific Cultural Competence Plan**

SPEAKER: Revella H. Nesbitt, M.Ed., LPC
Community Relations Manager and Cultural Competence Coordinator, pbH

DESCRIPTION: Having a solid plan for cultural competence within your organization is necessary, if you want it to be successful in this area. This session will identify steps to lead your organization in the development of a strategic cultural competence plan. Having a clear mission statement is one building block on which a plan is developed. Cultural competence should also identify consumers' present and future needs. This session will be an overview of the foundational elements needed to develop this type of plan.

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: **LME Medicaid UM – Ready When UR!**

SPEAKERS: Clay Doxey, Medicaid UM Director, Eastpointe
Sean Schreiber, UM Director, The Durham Center

DESCRIPTION: You will want to come to this session to learn about:

- The road we've traveled thus far;
- Provider benefits – WOW!
- Philosophical differences between Medicaid and IPRS – We're not in Kansas anymore;
- IT Update – High Tech with Home Town Warmth!
- and a System Sneak Preview.

TRACK 2

SESSION: **The Appeal Process - Getting It Right: Before and After**

SPEAKER: Larry F. Holcombe, CCS, Provider Relations Coordinator, Pathways LME

DESCRIPTION: This session is for Providers and LMEs. It will address do's and don'ts experienced by Providers and LMEs before and after the local reconsideration/appeal process has begun. It is designed to offer simple tips on preventing loss of endorsement, but most importantly about being prepared to enter and present throughout the appeal process and to assist LMEs to meet procedural and timeframe requirements. It will highlight experiences and allow the opportunity to openly discuss the local reconsideration/appeal process from both the provider and LME perspective.

TRACK 3

SESSION: **The Power of Assessments**

SPEAKER: Tracy T. Mambrino, PHR, Manager, Training & Assessments
The Employers Association

DESCRIPTION: In this session you will learn to improve individual and organizational performance, promote and develop the right people, and reduce turnover. Would you like to reduce turnover and improve your organization's performance? Employment tests can be a proven, objective means to help employers make better hiring and promotion decisions. A recent Supreme Court case confirmed that employers are safe to use assessment tools as part of the promotion and development process, as long as they use tools that are valid and reliable for that business purpose. This session will highlight tips and best practices for using assessment tools as part of the hiring, promotion and development process.

TRACK 4

SESSION: **NC-TOPPS Data Uses for Quality Management and Accreditation Purposes**

SPEAKERS: James (JT) Cardwell, Quality Assurance, Partnership for a Drug Free North Carolina
Marge Cawley, Ph.D., Project Director, National Development Research Institutes, Inc.

DESCRIPTION: Treatment providers and local management entities are expected to conduct quality assurance and to be accredited in continuous quality improvement. 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 session is designed to demonstrate how NC-TOPPS data can be used in program quality management and accreditation. The presenters will crosswalk NC-TOPPS measures for use in accreditation and model how to apply NC-TOPPS data to continuous quality improvement of treatment. Additionally, how to use new NC-TOPPS tools, such as the individual Report, in data gathering will be discussed. Attendees should leave the session with an understanding of how NC-TOPPS data and outcome measures can aid in successful continuous quality improvement and lead to improved communication between LMEs and providers.

TRACK 5

SESSION: **Involuntary Commitments 101**

SPEAKERS: Barbara Hallisey, Pathways LME
Doug Trantham, Smoky Mountain Center

DESCRIPTION: This session will provide the basics regarding the Involuntary Commitment Process. Examples will be provided from two of the IVC pilot sites and will share their experiences.

TRACK 6

SESSION: **Human Resources Developments**

SPEAKER: Kim Newsom, Randolph County Personnel

DESCRIPTION: Multiple changes are impacting the Human Resources field based upon the recent actions in Raleigh and Washington. With new legislation adopted and new court rulings, it is time to get an update on what has changed and what changes are on the legislative agendas. We will review the recent Supreme Court cases on Reverse Discrimination and Age Discrimination and address the Healthy Families Act, as well the status of a proposed National Health Plan and the Employee Free Choice Act. Join us to hear the latest!!!

4:45 – 6:00 P.M.

NC-TOPPS Advisory Meeting

5:00 – 6:50 P.M.

HOSPITALITY SUITE – Thomas Wolfe Suite, Room 220 – Sponsored by Exhibitors/Vendors
“Visit with friends”

7:00 – 8:30 P.M.

Retiree Reception will be held to honor FARO retirees
Heavy hors d’ouerves will be served
Announcement of 2010 FARO Officers and Outstanding Service Award

8:30 – 12:30 A.M.

ENTERTAINMENT – *Westsound Band*
Pilot / Pisgah / Roan – Sponsored by Exhibitors/Vendors

WEDNESDAY, NOVEMBER 4, 2009

7:30 – 9:00 A.M.

CONTINENTAL BREAKFAST – Mt. Mitchell Room

8:45 – 10:15 A.M. – BREAKOUT SESSIONS
(Choice of 3 Breakout Sessions)

TRACK 1

SESSION: **Understanding Clinical Coverage Policy 8A**

SPEAKER: Bert Bennett, PhD, Clinical Policy, Behavioral Health Section, Division of Medical Assistance (DMA)

DESCRIPTION: This session will provide a general overview of Clinical Coverage Policy 8A which outlines the policies and procedures that LMEs and direct enrolled providers must follow to receive reimbursement for covered enhanced benefit behavioral health services. This policy sets the basic requirement that qualifies providers to bill mental health and substance abuse services to Medicaid. Participants will have an opportunity for questions.

TRACK 2

SESSION: **NC-TOPPS – Let's Get Technical**

SPEAKERS: Jaclyn Johnson, Center for Urban Affairs, NCSU
Kathryn Long, Center for Urban Affairs, NCSU

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 session is designed to facilitate participants' understanding of the technical workings of NC-TOPPS and what administrative tools are available to users within NC-TOPPS and how these tools can be used to improve data quality. In addition, participants will get an introduction into the latest data tools that have been developed.

TRACK 3

SESSION: **Complaints Data as QI Resource**

SPEAKERS: Kris Booker, Western Highlands
Steve Legeay, Western Highlands
Lynn Trotter, Western Highlands

DESCRIPTION: Complaints data is a very useful, but often disregarded QM resource for LMEs. This presentation gives suggestions for how LMEs might use complaints data to enhance QI efforts, both internally and for their provider network. With 4 fiscal years of data available, frequency of complaints can be charted according to demographics such as age, race, sex, and disability status. Useful things to know also include changes in the nature of concern driving complaints, and patterns of LME actions taken in response to complaints. Patterns of complaint concentration among providers are also useful for purposes of provider education and network development.

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

10:30 – 11:45 A.M. – JOINT SESSION

CLOSING SESSION

DMA / Division Update

Tara Larson, Division of Medical Assistance (DMA)
Leza Wainwright, Director, Division of MH/DD/SAS

This session will provide an update from the Divisions of DMH and DMA. Time will be spared for questions/answers with LME/Provider participation.

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

**NC FARO
2010 SPRING CONFERENCE
April 25 – 28, 2010
Hilton Wilmington Riverside
Wilmington, NC
Phone: 910-763-5900**

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

CONFERENCE REGISTRATION: *Payment must be postmarked no later than October 9, 2009 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 for conference.

Registration Fees:

	<u>Postmarked Early Registration by 10/9/09</u>	<u>Postmarked 10/10/09-10/26/09</u>
FARO Member (LME/AP, Provider, DHHS) – be sure you are a “2009” 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
	<u>On-site Rates (10/27/09 – 11/4/09)</u>	
<u>On-site “Full” Registration (member or non-member) – Payment in hand only.</u>	\$ 225.00	
<u>On-site “One-Day” Registration (member or non-member) – Payment in hand only.</u>	\$ 125.00	

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.

- | | |
|--|--|
| <input type="checkbox"/> Balancing Life with Humor and Motivation | <input type="checkbox"/> Compliance Update |
| <input type="checkbox"/> Provider Monitoring | <input type="checkbox"/> Medicare – Covering Both the Basics & Current Updates |
| <input type="checkbox"/> Responding to Law Enforcement Requests | <input type="checkbox"/> How to Conduct a Change Cycle |
| <input type="checkbox"/> Update on IRIS (Incident Reporting System) | <input type="checkbox"/> Excel 2007 Data Commands |
| <input type="checkbox"/> CDW / IPRS | <input type="checkbox"/> Crystal Ball or Business Strategy? Succession Planning |
| <input type="checkbox"/> Records Retention: What You Should Know | <input type="checkbox"/> Starting a Cultural Competence Initiative |
| <input type="checkbox"/> Perfection IS in the Eye of the Beholder | <input type="checkbox"/> Consultants Roundtable (Lunch Mtg.-Lunch on your own) |
| <input type="checkbox"/> Breaches Not Breeches: You May Notice Me | <input type="checkbox"/> LGC Update |
| <input type="checkbox"/> QI Projects | <input type="checkbox"/> Non-Medicaid Appeals |
| <input type="checkbox"/> e-Discovery | <input type="checkbox"/> CSC Update |
| <input type="checkbox"/> Customer Satisfaction Survey | <input type="checkbox"/> Excel 2007 Functions for Automating Reports |
| <input type="checkbox"/> The times, they are a'changin: Dealing with a Climate of Change | <input type="checkbox"/> How to Develop & Implement Risk Mgmt & Corporate Plans |
| <input type="checkbox"/> Critical Role of CFO's in Financial Turnaround | <input type="checkbox"/> Developing an Agency Specific Cultural Competence Plan |
| <input type="checkbox"/> Contract Determination - Financial Assistance vs. Purchase of Service | <input type="checkbox"/> LME Medicaid UM – Ready When UR |
| <input type="checkbox"/> QI Projects, continued | <input type="checkbox"/> The Appeal Process – Getting It Right: Before and After |
| <input type="checkbox"/> Microsoft Office SharePoint | <input type="checkbox"/> The Power of Assessments |
| <input type="checkbox"/> Improving Performance Indicators | <input type="checkbox"/> NC-TOPPS Data Uses for QM and Accreditation Purposes |
| <input type="checkbox"/> MH & SA Services Offered to Our Veterans | <input type="checkbox"/> Involuntary Commitments 101 |
| <input type="checkbox"/> Being Audit Ready all the Time | <input type="checkbox"/> Human Resource Developments |
| <input type="checkbox"/> Finance Officers Networking | <input type="checkbox"/> NC-TOPPS Advisory Meeting |
| <input type="checkbox"/> Reimbursement Networking | <input type="checkbox"/> Understanding Clinical Coverage Policy 8A |
| <input type="checkbox"/> Provider Networking | <input type="checkbox"/> NC-TOPPS: Let's Get Technical |
| <input type="checkbox"/> IT Roundtable | <input type="checkbox"/> Complaints Data as QI Resource |
| <input type="checkbox"/> QM Roundtable | <input type="checkbox"/> DMA / Division Updates |
| <input type="checkbox"/> Valuing Differences | |
| <input type="checkbox"/> Business & Professional Ethics | |
| <input type="checkbox"/> Outcomes Reporting: How to Define Outcomes | |
| <input type="checkbox"/> Excel 2007 Basic Shortcuts | |
| <input type="checkbox"/> Leading in Times of Transition and Change | |
| <input type="checkbox"/> Medicaid – How Well Do You Know It? | |

(Please print all information clearly)

NAME: _____

TITLE: _____

AGENCY: _____

MAILING ADDRESS: _____

CITY: _____ **STATE:** _____ **ZIP CODE:** _____

PHONE: _____ **E-MAIL:** _____

MEMBERSHIP STATUS:
 (Note: check your 2009 membership status)
 FARO **MEMBER** (LME / AP / PROVIDER / DHHS)
 NON-MEMBER (LME / AP / PROVIDER / DHHS)
 OTHER **NON-MEMBER**

CONFERENCE ATTENDANCE:
 FULL CONFERENCE
 ONE DAY (Mon Tue Wed) (check day)