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

North Carolina Finance & Reimbursement Officers Association (NC FARO)

2011 SPRING CONFERENCE

MAY 8-11, 2011

REGISTRATION AGENDA

Hilton Wilmington Riverside
Wilmington, North Carolina

NC FARO Spring 2011 Conference
May 8-11, 2011
Wilmington, NC

CONFERENCE INFORMATION: PLEASE READ!

Important Registration Information:

- **SAVINGS!!!!!!! – Register 4 individuals for FULL conference from your agency only and get the 5th registration from your agency FREE (Note – one day registrations do not count).**
  In order to receive your FREE registration:
  1) correct payment (based on membership status) must be submitted with registration forms; AND
  2) ALL forms must be received TOGETHER by MAY 3, 2011. Does not apply to walk-ins at the conference. No refunds for a cancellation.
- **TRAINING CREDIT OFFERED: CEUs will be offered for the session on "Cultural Self-Awareness As A Prerequisite To Cultural Competence" scheduled for Monday. In order to receive three CEUs, you must attend the full 2 sessions.**
- **Payment must be received with completed registration form**. Individuals will not be registered for the conference until accurate full payment (based on membership status) is made.
- Please be sure to include (***please print clearly***) your email address on registration form so confirmation can be made (Note: All confirmations will be made by email).
- **If you have mailed your registration but have not received a confirmation by email**, contact Marilyn Brothers at marilynbrothers@earthlink.net or by phone at 919-740-9435. 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 along with payment must be "**received" by MAY 3, 2011** (be sure to mail your registration and payment in advance to ensure receipt by this date). To receive Early Registration rates, payment must be postmarked by April 15, 2011.
- 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.

NOTE: Alice Matthews has retired from NC-FARO. All registrations must be sent to Marilyn Brothers, P.O. Box 2001, Cary NC 27512. Please ensure your files have been updated to reflect this change.

On-line Registration

- On-line registration is available on NC FARO website at www.ncfaro.org. Follow on-line instructions to register. Payment must be made by mail.
- Mailed registrations / payments **MUST** be received by May 3, 2011. Early Registration must be postmarked by April 15, 2011.

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.

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Registration Fees:	Postmarked Early Registration by 4/15/11	Postmarked 4/16/11-5/3/11
FARO Member (LME/AP, Provider, DHHS) – **be sure you are a "2011" 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 Rates	
On-site "Full" Registration (member or non-member) – Payment in hand only.	$ 225.00	
On-site "One-Day" Registration (member or non-member) – Payment in hand only.	$ 125.00	

*If you are unsure as to your **"2011"** membership status, please contact the membership committee member listed before registering.

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Cancellation Policy:

- Registration fees less, a $15 administrative fee, will be refunded if request is received by 5 pm April 22, 2011.
- April 23, 2011-April 30, 2011 refunds less a 50% cancellation fee will be honored at your request. **No** requests for refunds will be accepted after 5 pm beginning April 30, 2011. Substitutions will be allowed upon request.
- To discuss a cancellation, call Marilyn Brothers at 919-740-9435 (phone) or by e-mail at marilynbrothers@earthlink.net.

Hotel Information:

- The NC FARO Spring 2011 Conference will be held at the Hilton Wilmington Riverside (301 N. Water Street, Wilmington, NC 28401).
- Room rates are $120.00 per night exclusive of taxes and parking. Please state when you call, you are with NC FARO (NC Finance and Reimbursement Officer's Association).
- **Online reservations:** http://www1.hilton.com/en_US/hi/hotel/ILMNCHF-Hilton-Wilmington-Riverside-North-Carolina/index.do. To book on-line, you must use the code "FAR" to book your rate.
- A block of 180 rooms have been reserved between three locations. The 180 room block at the NC FARO rate is on a **FIRST COME FIRST RESERVED** basis until the block is full or the April 7, 2011 cut-off date. **PLEASE RESERVE YOUR ROOM NOW to ensure you get your room at this rate.**

    - Hilton Wilmington Riverside and Riverview Suites. **Reservations number is 910-763-5900**
    - Shell Island Resort. **Reservations number is 800-689-6765**

- Failure to cancel your reservation within 72 hours prior to your arrival or failure to show on your day of arrival will result in a charge.
- The reservation cut off date is **APRIL 7, 2011** or until the block of 180 rooms is filled, so make your reservations NOW.
- All reservations must be accompanied by a first night room deposit or guaranteed with a major credit card. Hotel will not hold any reservations unless secured by one of the above methods.
- Guest room check-in/Check-out time is as follows:
  Check-in Time 4:00 PM Check-out Time: 11:00 AM

Current Parking Fees:

Daily Attendees	$5.00/Day
Overnight Guests	**$7.00 (Group Discount)**
Valet Parking	$12.00/Day

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: Brenda Pittman, bpittman@eastpointe.net, 910-298-7158 or
  Pat Myers, pat_myers@ocbhs.org, 252-240-9530
- Membership questions contact: Debbie Barnett, dbarnett@eastpointe.net, 910-298-7135
- Conference Registration questions contact: Marilyn Brothers, marilynbrothers@earthlink.net, 919-740-9435
- Provider questions contact: Gayle Mahl, gayle@phoenixcc.us, 704-476-4136
- NC FARO 2011 President: Kim Keehn, kdkeehn@ecbhlme.org, 252-639-7876

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.

PLEASE share the registration agenda with other interested parties.

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. Failure to adhere to this request could result in your being asked to leave the conference.**

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

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

NORTH CAROLINA FINANCE, REIMBURSEMENT AND MIS OFFICER'S (NC FARO) SPRING 2011 CONFERENCE

SUNDAY, May 8, 2011

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

8:30 – 11:00 P.M. **HOSPITALITY SUITE** –Room 331 North Tower, Exhibitor / Vendor Sponsored Event
"Visit with friends and meet new FARO participants"

MONDAY, May 9, 2011

7:15 – 8:45 A.M. **CONTINENTAL BREAKFAST**-Azalea
Exhibitor / Vendor Sponsored Event

7:15 – 3:00 P.M. **REGISTRATION** – Lower Lobby

8:15 – 9:00 A.M. **WELCOME and BUSINESS MEETING**

Jill Queen, PBH
2011 NC FARO Vice-President

VENDOR INTRODUCTIONS

9:00 – 10:15 A.M. – JOINT SESSION

KEYNOTE ADDRESS

The NC MH/DD/SA System: A Look At How Far We've Come And Where We Are Going

Lanier M. Cansler, Secretary of the North Carolina Department of Health and Human Services

DESCRIPTION: As North Carolina continues to undergo tremendous change in the mental health, developmental disabilities, and substance abuse system, it can be easy to forget just how far we have come over the last several years. In this session, Secretary Cansler will reflect on the recent changes that have taken place in the system and the positive impact of those changes in the lives of consumers and families. As continued change is inevitable, Secretary Cansler will review the legislative issues from the General Assembly that will guide the future of our system and address where he sees us going and how we will all get there together.

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

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

Track 1

SESSION: **Excel 2007 Shortcuts and Tips**

SPEAKER: Tommy B. Harrington, President, CompuHELP

DESCRIPTION: This session fully explains the new features of Excel 2007. This seminar is very beneficial for financial professionals. Learn features and techniques that increase the productivity of all Excel users. Shortcuts, shortcuts, and more shortcuts! Become an expert on the Data Commands—Sort, Eliminate Duplicates, Filter, Subtotals, Text to Columns, and the new Table command. You will learn techniques to automate repetitive reports, and create management whenever new data is simply entered or imported. You will be amazed at all Excel's features for summarizing accounting, production, and management information. Learn tips and shortcuts to save hours each week.

Track 2

SESSION: **Supports Intensity Scale (SIS): From Pilot Project To Statewide Implementation-Where Are We?**

SPEAKER: Robin Snead, SIS Coordinator, Developmental Disabilities Training Institute (DDTI)

DESCRIPTION: With one of the major benefits of the SIS being its enhancement of the Person Centered Planning process, the SIS provides North Carolina strength based approach for assessing the direct support needs of individuals with intellectual and/or developmental disabilities. This session offers attendees the opportunity to learn about the unique qualities of the SIS, how to summarize the findings, and directly incorporate the results into the Person Centered Plan (PCP). Tips for a successful SIS interview and an examination of the activities toward Statewide Implementation thus far will also be explored.

Track 3

SESSION: **HR Verification: How To Ensure The Knowledge, Skills, and Abilities Of Your Staff**

SPEAKER: Traci Holloman, Executive Director for Mental Health Services in NC, ResCare
Kathy Rubendall, Monitoring Manager, Western Highlands Network
Debbie Jenkins, Local Mental Health Administrator, Cumberland LME
Lynn Parrish, Human Resources Department, The Beacon Center
Leigh Elrod, Vice-President, Human Resources, Easter Seals UCP

DESCRIPTION: One essential role of the Human Resources Department within a provider agency is to ensure that the staff members that are hired meet all of the requirements for the position. This includes verifying education, verifying previous work experience, competencies and training. It is critical that provider agencies ensure that staff members meet the requirements per the service definitions and State rules and regulations. As part of provider monitoring and endorsement, it is required that LME staff verifies that the agency staff have ensured that all staff members providing the services do in fact meet all of the requirements. In this session, the panel of HR staff from several provider agencies and staff members from several LME's will give an overview of the requirements and share information about the processes that they have put in place to ensure that all staff members meet the requirements of the service definitions and State rules and regulations. Also, some lesions learned will be shared that may assist provider agencies as they work to determine that qualified staff are providing services to our consumers. Attendees will be able to ask questions of the panel once the presentation is complete.

Track 4

SESSION: **To Tweet Or Not To Tweet**

SPEAKER: Shannon Tufts, PhD, UNC School of Government

DESCRIPTION: This session will highlight social media trends and best practices for public sector information technology professionals. We will discuss emerging social networking tools, the impact of Web 2.0 on the public sector, and the latest security threats and protections that you should consider. Legal issues and policies will also be covered during the sessions.

Track 5

SESSION: **CABHA Monitoring….The Next Steps**

SPEAKER: Jim Jarrard, Deputy Director, Division of MH/DD/SAS

DESCRIPTION: Now that almost 200 provider agencies have been certified as CABHA's, attention and resources will begin to focus on the CABHA monitoring process. The monitoring of CABHA's is critical to ensure that CABHA's continue to meet requirements for service delivery, access to care, good standing status, and leadership requirements. The presenter will cover the CABHA areas to be monitored which includes, but is not limited to: personal outcomes, patterns of referral, regulatory compliance, and quality management. This session will also take a look at the CABHA monitoring tool developed by the Division of MH/DD/SAS that will be used in the monitoring process of CABHA's. This session is a "must" for current CABHA agencies, those newly certified as CABHA's, and even those organizations working towards obtaining CABHA certification.

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

1:30 – 2:45 P.M. – BREAKOUT SESSIONS
(Choice of 5 Breakout Sessions)

Track 1

SESSION: **Gearing Up With ICD-10 (Part 1 of 2)**

SPEAKER: Lisa Gay, RHIA, Health Information Manager Educator, Pitt Community College/Edgecombe Community College

DESCRIPTION: This session will include information on the upcoming implementation requirement for ICD-10 including timeframes, requirements, and implementation information. Learn about ICD-10 and what you will need to know to appropriately bill for services.

Track 2

SESSION: **Excel's Best Functions**

SPEAKER: Tommy B. Harrington, President, CompuHELP

DESCRIPTION: Functions and formulas are the most important part of Excel worksheets. Discover the functions that are the most useful when getting your daily work done. Learn to use VLOOKUP, SUMIF, and other functions that might do the same job in better ways. Learn functions that can solve problems when importing data. You will discover functions that save hours of time when creating routine summaries. Become an expert on the most useful Excel functions.

Track 3

SESSION: **Making Sense Of Electronic Health Records Systems**

SPEAKER: David Abrams, CDIA+, EHR Consultant

DESCRIPTION: There are many factors that are driving Providers toward the use of Electronic Health Record Systems. Stimulus reimbursement, parity, pay for performance and other factors are rapidly transforming how Providers manage information within their organizations.

How can the costs of adoption of electronic processes within an organization be offset by the gains in staff productivity and reduction in ongoing operational costs? Does it make sense for your organization to make the conversion away from paper-based or manual processes?

In this session, we will review the use of Electronic Health Record systems to track client and staff activities and results. Attendees will be exposed to concepts such as the benefits of automated workflow, managing authorizations, client chart management and reporting tools used to measure client outcomes and program effectiveness. We will discuss methods of analyzing documentation and reporting needs both internal and external to the organization.

A tool for evaluating needs, associated costs and ROI for implementing an EHR system in your organization will be provided.

A discussion of stimulus reimbursement by demonstrating Meaningful Use of electronic health records in compliance with the HITECH Act will help Providers understand requirements and potential funding available to offset the cost of adopting a certified Health IT system where applicable.

Track 4

SESSION: **Reel Diversity: Cultural Self-Awareness As A Prerequisite To Cultural Competence (Part 1 of 2)**

NOTE: THIS IS A TWO PART SESSION. YOU MUST ATTEND BOTH SESSIONS TO BE ELIGIBLE TO RECEIVE A CERTIFICATE FOR THREE CEUs.

SPEAKER: Michael Kahn, L.P.C, J.D., Reel Workshops

DESCRIPTION: Understanding cultural issues is not only critical to providing superior care, but is also an ethical mandate. Many diversity workshops strictly focus on race. This workshop will explore a broader definition of diversity. In addition, the main focus will not be on specific characteristics of different groups. Rather, we will explore how the helping professional's experiences and background could affect work with diverse client populations. As with other REEL workshops, multiple film clips and vignettes will be used to illustrate the issues and spark an open discussion.

Track 5

SESSION: **Creating Balance While Increasing Your Productivity**

SPEAKER: Shannon Tufts, PhD, Institute of Government

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

2:45 – 3:00 P.M. **BREAK: EXHIBITOR / VENDOR VISITATION-Azalea**

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

Track 1

SESSION: **Gearing Up With ICD-10 (Part 2 of 2)**

SPEAKER: Lisa Gay, RHIA, Health Information Manager Educator, Pitt Community College/Edgecombe Community College

DESCRIPTION: This session will continue to include information on the upcoming implementation requirement for ICD-10 including timeframes, requirements, and implementation information. Learn about ICD-10 and what you will need to know to appropriately bill for services.

Track 2

SESSION: **Excel Macros: Using Excel For QM Data Processing**

SPEAKER: Tommy B. Harrington, President, CompuHELP

DESCRIPTION: Excel Macros are a very efficient way to understand what is in a data set. They are particularly useful with data that is analyzed periodically (monthly and quarterly reports) because the data is processed the same way each month. This session will use "live data" from an LME to demonstrate how Macros in Excel can speed up data analysis. Discussion will include lessons learned from working with Macros and potential uses beyond the examples that are presented.

Track 3

SESSION: **Health Care Reform And The Impact On MH/DD/SA Services**

SPEAKER: Pam Silberman, President and CEO, North Carolina Institute of Medicine

DESCRIPTION: This session will provide a brief overview of the Patient Protection and Affordable Care Act (ACA), focusing on areas of the law that have special relevance to people with mental health conditions, developmental disabilities, or substance abuse disorders. The ACA has provisions which may change how North Carolina delivers and finances services to this population.

Track 4

SESSION: **Reel Diversity: Cultural Self-Awareness As A Prerequisite To Cultural Competence (Part 2 of 2)**

NOTE: THIS IS A TWO PART SESSION. YOU MUST ATTEND BOTH SESSIONS TO BE ELIGIBLE TO RECEIVE A CERTIFICATE FOR THREE CEUs.

SPEAKER: Michael Kahn, L.P.C, J.D., Reel Workshops

DESCRIPTION: Understanding cultural issues is not only critical to providing superior care, but is also an ethical mandate. Many diversity workshops strictly focus on race. This workshop will explore a broader definition of diversity. In addition, the main focus will not be on specific characteristics of different groups. Rather, we will explore how the helping professional's experiences and background could affect work with diverse client populations. As with other REEL workshops, multiple film clips and vignettes will be used to illustrate the issues and spark an open discussion.

Track 5

SESSION: **<u>After Accreditation: Now What? Keys To A Successful Re-Accreditation</u>**

SPEAKER: Sue Creighton, President of Creighton Consulting, Inc. and Partner in CWBH Consultants, LLC

<u>DESCRIPTION</u>: Accreditation is essential for success in today's changing service environment. While accreditation is challenging, re-accreditation is where the real struggle begins for many organizations. In order to successfully pass re-accreditation, organizations need to have effective strategies to ensure accreditation standards are monitored and continue within daily operations of the organizations. In this session, participants will discover key principles for effective planning and fail proof strategies for maintaining accreditation activities.

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

Track 1

SESSION: **<u>LME Finance Officers Networking</u>**

FACILITATOR: Kelly Goodfellow, CFO, The Durham Center

<u>DESCRIPTION</u>: Discussion of financial and operational issues that are daily challenges in your agency. Share concerns and learn what others have done or are doing to work through those same type issues. What are your training needs for the Fall 2011 conference? Do you know of topics and speakers that you would like to see on the Spring agenda?

Track 2

SESSION: **<u>Reimbursement Officers Networking</u>**

FACILITATOR: Beth Brown, Program Coordinator V, Pathways LME

<u>DESCRIPTION</u>: Please take advantage of this opportunity for an open forum discussion of the latest challenges and issues affecting billing of services and collections. Bring your questions and concerns to discuss with your peers. The group will also discuss your training needs for the Fall 2011 conference.

Track 3

SESSION: **<u>IT Roundtable</u>**

FACILITATOR: George Scott, IT Director, Western Highlands Network

<u>DESCRIPTION</u>: Many upgrades and changes are occurring across the state in IT departments. Come prepared to discuss the latest issues and every changing requirements facing IT directors and staff. The group will also discuss your training needs for the Fall 2011 conference.

Track 4

SESSION: **<u>Provider Networking</u>**

FACILITATORS: Richard Anderson, Director of Governmental Affairs. and Strategic Planning, True Behavioral Healthcare
Gayle Mahl, Director of Services and Site, Phoenix Counseling Center

<u>DESCRIPTION</u>: Join your fellow providers to discuss current issues pertinent to private providers. Share your experiences and learn from others. What are your training needs for the Fall 2011 Conference? Do you know of topics and speakers that you would like to see on the Fall 2011 agenda? Share those with your facilitator.

8:30 – 10:30 P.M. **HOSPITALITY SUITE –** Room 331 North Tower / Vendor Sponsored Event
"Visit with friends and meet new FARO participants"

"Come, relax and visit with other participants. Make new friendships and partnerships."

TUESDAY, May 10, 2011

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

7:45 – 3:00 P.M. **REGISTRATION** – Lower Lobby

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

Track 1

SESSION: **4010 to 5010: Don't Get Left in the Dust (Part 1 of 2)**

SPEAKER: Vince Joyce, Senior Consultant, e3 Informatics, LLC

DESCRIPTION: Beginning January of 2012, all electronic healthcare claims must comply with the new national 5010 guidelines. This is the first major transaction set update since HIPAA was enacted in 1996. The new guidelines contain both technical and procedural changes, and will help facilitate the mandated implementation of ICD-10 in 2013. This session will discuss the key differences between 4010 and 5010, the particular transaction sets affected by the new guidelines, and strategies for updating and testing your system. Payers cannot accept the old 4010 transaction sets after next January, so correct implementation of 5010 is crucial to your revenue stream. Don't get left behind.

Track 2

SESSION: **Provider Performance Report And NC-TOPPS**

SPEAKERS: Becky Ebron, NC-TOPPS Project Manager/Quality Management Evaluator, Division of MH/DD/SAS
Marlee Moore, Data Analyst and Consultant with Division of MH/DD/SAS

DESCRIPTION: This session will look at the importance and relevance of NC-TOPPS, the Division's consumer outcomes system and demonstrate some of the new features of the NC-TOPPS Outcomes at a Glance 2.0 dashboard. This revised dashboard allows consumers, providers, LME's and the public to view and print graphs, as well as download outcomes data for all mental health and substance abuse providers participating in NC-TOPPS. The information provided shows current State, LME, and provider information on meaningful outcomes for mental health and substance abuse consumers. This data can be very useful to provider agencies as they are conducting quality management activities. The Individual Report, another great feature of this system, will also be reviewed. This report shows the progress of a particular individual throughout their episode of care. This report has been designed to promote the individual's participation in the treatment planning process by giving an opportunity for discussion between the individual and their treatment team or clinician as they look at the individual's personal goals and progress.

Track 3

SESSION: **Quality Management In A 1915 Waiver (Part 1 of 2)**

SPEAKERS: Colleen Konicky, Quality Management Data Manager, PBH
Bill Rankin, Director of Quality Management, PBH

DESCRIPTION: Quality Management in a waiver environment presents a unique set of opportunities and challenges for the LME and providers. This session will provide insight into successfully addressing important quality management functions under the waiver structure. Participants will identify how quality management data is utilized, both as an oversight tool and for informed decision-making as well as the importance of coordinated internal quality improvement efforts within a waiver site; QM requirements for waiver LMEs; provider quality management considerations within the waiver environment; and the use of data and reporting for waiver management.

Track 4

SESSION: **Using The ASAM Criteria Placement Criteria Within The Full Continuum Of Substance Abuse Treatment (Part 1 of 2)**

SPEAKER: Kevin Oliver, CEO, Phoenix Counseling Center

DESCRIPTION: The American Society of Addiction Medicine's (ASAM) Patient Placement Criteria is the most widely used and comprehensive national guideline for placement, continued stay, and discharge of patients with alcohol and other drug problems. This session will provide participants with the information necessary to utilize this essential tool for use in treatment planning and admission/medical necessity determinations within the full continuum of substance abuse services. It will provide a framework for placing consumers with alcohol and drug use disorders of service authorization. Recommended participants: All providers of substance abuse services and LME UM/monitoring staff.

Track 5

SESSION: **NC Tracks**

SPEAKER: Cheryl McQueen, Business Systems Analyst Supporting NC Tracks and IPRS, Division of MH/DD/SAS

DESCRIPTION: DMH/DD/SAS, DMA, DPH, and ORHCC (Office of Rural Health and Community Care) have contracted with CSC to replace their existing claims payment systems, IPRS, MMIS, and POMCS (Purchase of Medical Care System). This session will provide an update of the design of that replacement system, NC Tracks, from a DMH/DD/SAS perspective.

Track 6

SESSION: **Quality Improvement Studies 101-How To Conduct Effective Studies**

SPEAKERS: Sue Creighton, President of Creighton Consulting, Inc. and Partner in CWBH Consultants, LLC
Jill Queen, Quality Monitoring Manager, PBH

DESCRIPTION: In the world of quality, you are only as good as your next quality improvement study. QI studies are an essential part of the new service culture in behavioral health and intellectual/developmental disabilities. Regardless of the size or complexity of an organization, effective quality improvement studies require an understanding of the basic "how to" principles. This session will focus on planning, utilizing data generated internally, designing and navigating quality improvement studies along with analyzing data to produce effective studies. Participants completing this session will be able to describe the steps involved in developing quality improvement studies, know how to choose areas of focus that will pass any accreditation and benefit consumers while using an effective implementation approach within the existing quality management structure.

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

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

Track 1

SESSION: **Quality Management In A 1915 Waiver (Part 2 of 2)**

SPEAKERS: Colleen Konicky, Quality Management Data Manager, PBH
Bill Rankin, Director of Quality Management, PBH

DESCRIPTION: Quality Management in a waiver environment presents a unique set of opportunities and challenges for the LME and providers. This session will provide insight into successfully addressing important quality management functions under the waiver structure. Participants will identify how quality management data is utilized, both as an oversight tool and for informed decision-making as well as the importance of coordinated internal quality improvement efforts within a waiver site; QM requirements for waiver LMEs; provider quality management considerations within the waiver environment; and the use of data and reporting for waiver management.

Track 2

SESSION: **Transition To Supervision**

SPEAKER: Kim Newsom, Retiree-Randolph County Government
Mel Crocker, Retiree-State of NC

DESCRIPTION: What issues face the first time supervisor? What functions are found in the role of a supervisor? How can you balance the employee demands with those "management" directives? This session will explore the transition challenges for a first time supervisor, pitfalls along the path to leadership and management, current functions of supervision and those skills that are critical to the success of the new supervisor. Join us for a fresh look at today's demands on the new supervisor!

Track 3

SESSION: **Congratulations…You Are A CABHA!!**

SPEAKERS: Richard Anderson, Director of Governmental Affairs and Strategic Planning, True Behavioral Healthcare
Glenn Buck, Chief Clinical Officer, PORT Human Services

DESCRIPTION: So, what's next??? Where do you go from here??? PORT Human Services and True Behavioral Health Care are certified CABHAs whose perspectives are similar yet different. Come hear their perspective on what it will take to be successful in this new role. This session will cover the issue of change as it relates to increasing the organizational footprint, related clinical and medical oversight, quality management, and meeting increased training expectations.

Track 4

SESSION: **Using The ASAM Criteria Placement Criteria Within The Full Continuum Of Substance Abuse Treatment (Part 2 of 2)**

SPEAKER: Kevin Oliver, CEO, Phoenix Counseling Center

DESCRIPTION: The American Society of Addiction Medicine's (ASAM) Patient Placement Criteria is the most widely used and comprehensive national guideline for placement, continued stay, and discharge of patients with alcohol and other drug problems. This session will provide participants with the information necessary to utilize this essential tool for use in treatment planning and admission/medical necessity determinations within the full continuum of substance abuse services. It will provide a framework for placing consumers with alcohol and drug use disorders of service authorization. Recommended participants: All providers of substance abuse services and LME UM/monitoring staff.

Track 5

SESSION: **Using CDW For DD Wait List/IPRS Federal Reporting**

SPEAKERS: Deborah Merrill, Business Systems Manager, Division of MH/DD/SAS
Cheryl McQueen, Business Systems Analyst Supporting NC Tracks and IPRS, Division of MH/DD/SAS

DESCRIPTION: The "Using CDW For DD Wait List/IPRS Federal Reporting" session will explore current options under consideration for the collection of DD Wait List data. One recent consideration is the use of a Teleform optical character recognition survey instrument to collect the necessary data, and to then use the CDW for data storage and reporting. A sample survey form will be presented and an opportunity will be given to share comments and input. The session will also include an overview of the reports that can be used for monitoring Federal reporting and provide a question/answer session for the attendees to provide more information about the type of reporting they require/desire.

Track 6

SESSION: **4010 to 5010: Don't Get Left in the Dust (Part 2 of 2)**

SPEAKER: Vince Joyce, Senior Consultant, e3 Informatics, LLC

DESCRIPTION: Beginning January of 2012, all electronic healthcare claims must comply with the new national 5010 guidelines. This is the first major transaction set update since HIPAA was enacted in 1996. The new guidelines contain both technical and procedural changes, and will help facilitate the mandated implementation of ICD-10 in 2013. This session will discuss the key differences between 4010 and 5010, the particular transaction sets affected by the new guidelines, and strategies for updating and testing your system. Payers cannot accept the old 4010 transaction sets after next January, so correct implementation of 5010 is crucial to your revenue stream. Don't get left behind.

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 5 Breakout Sessions)

Track 1

SESSION: **Who Is The Legally Responsible Person?**

SPEAKER: Mark Botts, Associate Professor of Public Law and Government

DESCRIPTION: Who may act on behalf of a minor child, or an adult who has been adjudicated incompetent or lost decisional capacity, for purposes of consenting to treatment, accessing client records, and authorizing disclosure of records? State law says it is the "legally responsible person." HIPAA says it is the "personal representative." But, how do you determine who that is? There are many possibilities: biological and adoptive parents, grandparents, step parents, departments of social services, etc. And, when can a child act on his or her own behalf, requiring you to deny others access to the minor client's record? These questions and more will be answered in this session.

Track 2

SESSION: **Waiver Update: Includes TCM And CAP MR/DD With A Focus On Self-Direction (Part 1 of 2)**

SPEAKER: Steve Jordan, Division Director, NC Division of MH/DD/SAS
Kelly Crosbie, Behavioral Health Manager, Division of Medical Assistance
Susie Eguez, Clinical Director, Developmental Disabilities Training Institute (DDTI)

DESCRIPTION: This session will provide attendees with the latest information on waivers, including targeted case management. Attendees will also receive an overview of authorization and claims data, a review of questions/feedback from providers, an overview of the auditing process, and discussion regarding implementation challenges with opportunities for solutions. Attendees will also receive an overview of the Self-Direction option within the CAP/MD Supports Waiver. Information will include: an overview of the Self-Direction option and "Agency with Choice" model, a description of operational details including roles and responsibilities of involved parties, and an overview of the process an individual would follow when selecting the option. This is an informative session that you will not want to miss.

Track 3

SESSION: **<u>Financial Management In A Waiver Environment (Part 1 of 2)</u>**

SPEAKER: Niels Eskelsen, Eskelsen & Associates Consulting Firm

<u>DESCRIPTION</u>: Managing financial resources is essential for any organization; however as North Carolina expands waivers across the state, the management of financial resources is fundamental to successful waiver operations. Providers and LME's must bend the cost curve and balance financial resource management with clinical care management through integration and managing risk using reporting and data management. This session will discuss the following key areas in waiver management: accrual versus cash based accounting for waiver management; calculating, reconciling and accounting for per member per month payments to the LME; encounter data management and reporting, tracking Medicaid revenues and expenditures for waiver operation versus IPRS revenues and expenditures; risk reserves, financial waiver reporting requirements; internal controls and external requirements for preventing or identifying fraud and abuse.

Track 4

SESSION: **<u>From Incident Reporting To Outcome Measures-The Journey of Western Highlands Network-What A Long And Strange Trip It's Been</u>**

SPEAKERS: Kathy Rubendall, Monitoring Manager, Western Highlands Network
Kristeen Booker, Quality Management Director, Western Highlands Network

<u>DESCRIPTION</u>: This session will showcase the process incorporated by Western Highlands Network (WHN) to review, analyze, and provide feedback to network providers who have reported Level II and Level III deaths of consumers in their care. Participants will: briefly review the NC DMH Incident Reporting Requirements; learn how WHN reviews these incidents, complete with the data sets; learn how WHN works with network providers in improving quality of care for consumers; find out the top 5 activities, if not done properly, will lead to avoidable consumer deaths and what YOU can do about them!

Track 5

SESSION: **<u>Leveraging Community Resources for MH/DD/SA Needs</u>**

SPEAKERS: Keith Grandberry, President and CEO, Winston-Salem Urban League
Patricia Sadler, Public Relations Director, Winston-Salem Urban League
Victor Armstrong, Community Operations Manager, CenterPoint Human Services
Chris Johnson, Founder/Facilitator, Young Men of Integrity, Hickory, NC
Lynette Scott, Substance Abuse Prevention Supervisor, Clay Wilson and Associates

<u>DESCRIPTION</u>: As resources become fewer and the demand for services continues to increase, LMEs and their community stakeholders find it more and more necessary to work together to find creative ways of leveraging resources. This session will focus on the collaborative partnerships formed between LME's and community organizations to create new resources and expand existing resources in their respective communities. CenterPoint LME has partnered with Winston–Salem Urban League to create new resources for underserved populations and to facilitate access to those who have not traditionally sought services. Mental Health Partners has collaborated with "Young Men of Integrity", a new and innovative community program designed to meet the needs of boys ages 10 to 19 by providing them with the skills, resources and opportunities they need in order to become successful in life. This will be an opportunity for LMEs and other stakeholders to ask question and solicit ideas on striking successful partnerships in their catchment areas.

2:45 – 3:00 P.M. **BREAK: EXHIBITOR / VENDOR VISITATION- Azalea**

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

Track 1

SESSION: **Marketing GPS-"Generating Practical Strategies"**

SPEAKERS: Michael Cottingham, Public Affairs Officer, CenterPoint Human Services
Stacy Bryant, Community Outreach Manager, Pathways LME

DESCRIPTION: For many LMEs, marketing is an afterthought. As the MH/DD/SA system continues to undergo change, and becomes more difficult to navigate, it has become increasingly important that LME's know how to plan and position themselves for change through effective marketing and strategically building community partnerships. This session will consist of representatives from 2 LMEs that have marketing strategies in place. CenterPoint Human Services and Pathways LME will discuss how their marketing strategies are developed, who the target audience is, and how you know if your marketing strategy has been successful. This is an opportunity for LMEs and other stakeholders to ask questions and learn lessons from fellow peers who devised successful marketing strategies.

Track 2

SESSION: **Waiver Update: Includes TCM And CAP MR/DD With A Focus On Self-Direction (Part 2 of 2)**

SPEAKER: Steve Jordan, Division Director, NC Division of MH/DD/SAS
Kelly Crosbie, Behavioral Health Manager, Division of Medical Assistance
Susie Eguez, Clinical Director, Developmental Disabilities Training Institute (DDTI)

DESCRIPTION: This session will provide attendees with the latest information on waivers, including targeted case management. Attendees will also receive an overview of authorization and claims data, a review of questions/feedback from providers, an overview of the auditing process, and discussion regarding implementation challenges with opportunities for solutions. Attendees will also receive an overview of the Self-Direction option within the CAP/MD Supports Waiver. Information will include: an overview of the Self-Direction option and "Agency with Choice" model; a description of operational details including roles and responsibilities of involved parties, and an overview of the process an individual would follow when selecting the option. This is an informative session that you will not want to miss.

Track 3

SESSION: **Making Effective Organizational Decisions**

SPEAKER: Vaughn Upshaw, EdD, DrPH Lecturer In Public Administration and Government, Institute of Government

DESCRIPTION: Effectively managing and navigating change in the MH/DD/SA service system and surviving budget cuts requires quality decision making by organizations. This interactive session will demonstrate how using different thinking styles improves the quality of decisions. Entities such as local governments, public schools and private industries using a technique called "Six Thinking Hats" have generated better outcomes for their organizations, clients and communities. Participants will apply the principles of "lateral thinking" and contrast this approach with more traditional, "critical thinking" methods.

Track 4

SESSION: **Collaboration With Physical Health: Community Care Of North Carolina's (CCNC) Recently Established Behavioral Health Program**

SPEAKER: Brian B. Sheitman, M.D., Associate Director, Community Care of NC's (CCNC) Behavioral Health Program

DESCRIPTION: CCNC is the Medicaid managed care entity for North Carolina. This group (and its local offices) has shown efficiencies and cost-savings in the physical health world. CCNC has recently initiated a behavioral health program in recognition of the frequent co-occurrence of physical and mental health disorders. This session will cover an overview of CCNC, how the CCNC-Provider-LME relationship should look and CCNC initiatives for persons with MH/DD/SA issues.

Track 5

SESSION: **Financial Management In A Waiver Environment (Part 2 of 2)**

SPEAKER: Niels Eskelsen, Eskelsen & Associates Consulting Firm

DESCRIPTION: Managing financial resources is essential for any organization; however as North Carolina expands waivers across the state, the management of financial resources is fundamental to successful waiver operations. Providers and LME's must bend the cost curve and balance financial resource management with clinical care management through integration and managing risk using reporting and data management. This session will discuss the following key areas in waiver management: accrual versus cash based accounting for waiver management; calculating, reconciling and accounting for per member per month payments to the LME; encounter data management and reporting, tracking Medicaid revenues and expenditures for waiver operation versus IPRS revenues and expenditures; risk reserves, financial waiver reporting requirements; internal controls and external requirements for preventing or identifying fraud and abuse.

5:00 – 6:50 P.M. **HOSPITALITY SUITE** –Room 331 North Tower -Sponsored by Exhibitors / Vendors
"Visit with friends"

7:00 – 8:30 P.M. **CASUAL RECEPTION – Magnolia/Dogwood/Camellia**
Come and join us to visit with friends and associates. Heavy hors d'oeuvres will be served.

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

WEDNESDAY, May 11, 2011

7:30 – 9:00 A.M. **CONTINENTAL BREAKFAST-Azalea**

7:45 – 10:30 A.M. **REGISTRATION** – Lower Lobby

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

Track 1

SESSION: **Health Care Reform And Its Impact On Employees**

SPEAKER: David Smith, Vice-President, Ebenconcepts Company, Inc.

DESCRIPTION: This session will give you insight into how the Patient Protection and Affordable Care Act will impact employers from now until 2014. The session will focus on the numerous mandates and changes that will be coming with the act's implementation.

Track 2

SESSION: **Detecting And Preventing Medicaid Fraud**

SPEAKER: James Springer, Mental Health Program Coordinator, Behavioral Health Review Section, DMA Program Integrity

DESCRIPTION: The Program Integrity Unit of the Division of Medical Assistance is responsible for detecting and preventing fraud, waste, program abuse, and ensuring that Medicaid dollars are paid appropriately by implementing tort recoveries, pursuing recoupments and identifying avenues for cost avoidance. This session will focus on the current and future activities of Program Integrity as they ensure compliance, efficiency, and accountability within the N.C. Medicaid Program. The presenter will cover such issues as how to make a report, the investigation process and feedback loop, current areas of focus/concern, and recent outcomes of investigations.

Track 3

SESSION: **<u>HIPAA's Breach Notification Rule</u>**

SPEAKER: Mark Botts, Associate Professor of Public Law and Government

<u>DESCRIPTION</u>: You have seen the rule, and may have applied it to a real situation. Did you figure out that an impermissible disclosure of protected health information is not necessarily a breach requiring client notification? What kinds of improper disclosures fall within the regulatory exceptions to the definition of "breach" and, therefore, are not breaches? Do you know how to conduct a "harm analysis" to determine whether an unauthorized disclosure poses a risk of financial or reputational harm to the client? Through scenarios and case studies, this session will answer these questions.

10:30 A.M. – 11:45:00 A.M.- JOINT SESSION

CLOSING SESSION

SESSION: **<u>The Future Direction of the NC MH/DD/SA System</u>**

SPEAKERS: Steve Jordan, Division Director, NC Division of MH/DD/SAS
Tara Larson, Chief, Clinical Operations Officer, Division of Medical Assistance

<u>DESCRIPTION</u>: Statewide changes continue to have an impact on consumers, providers, and LME's, in the North Carolina Mental Health, Developmental Disabilities, and Substance Abuse system. In this session, leaders from the Division of Medical Assistance and the Division of Mental Health, Developmental Disabilities, and Substance Abuse Services will provide an update on some of the changes that are taking place and provide a management perspective on where we go from here. Presenters will cover recent policy issues, legislative issues, budget issues, and discuss how these will affect the future direction of the MH/DD/SA system in North Carolina. Time will be allowed for questions from participants.

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

We appreciate all of you who so generously donate door prizes from your agency. Thanks for participating in our closing activities!

NC FARO
2011 FALL CONFERENCE

November 13-16, 2011
Crowne Plaza Resort
One Resort Drive
Asheville, NC 28806
Phone: 1-800-733-3211

***** MAKE YOUR RESERVATION EARLY TO ENSURE YOUR ROOM AT THE CROWNE PLAZA RESORT*****

CONFERENCE REGISTRATION: Payment must be **postmarked no later than April 15, 2011** 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. **NOTE: Alice Matthews has retired from NC-FARO. Please ensure your files are updated to reflect that your registration should be sent to Marilyn Brothers.**

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Registration Fees:	Postmarked Early Registration by 04/15/11	Postmarked 04/16/11 – 05/03/11
FARO Members (LME/AP, Provider, DHHS) – **be sure you are a "2011" 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 Rates	
On-site "Full" Registration (members/non-members) – Payment in hand only.	$ 225.00	
On-site "One Day" Registration (members/non-members) – Payment in hand only.	$ 125.00	

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MAKE CHECK PAYABLE TO 'NC FARO' Mail to:

Marilyn Brothers
NC FARO
P O Box 2001
Cary, NC 27512-2001

Amount to be Paid $ _____________

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

____ The NC MH/DD/SA System (Keynote Address)
____ 5010 Transactions Sets
____ Excel 2007 Shortcuts & Tips
____ SIS: From Pilot Project To Statewide Implementation
____ HR Verification: How To Ensure The Knowledge, Skills…
____ To Tweet Or Not To Tweet
____ Gearing Up With ICD-10
____ Excel's Best Functions
____ Quality Management In A 1915 Waiver
____ Reel Diversity: Cultural Self-Awareness
____ Creating Balance While Increasing Your Productivity
____Excel Macros: Using Excel For QM Data Processing
____ Health Care Reform And The Impact On MH/DD/SA Services
____ LME Finance Officers Networking
____ Reimbursement Officers Networking
____ IT Roundtable
____ Provider Networking
____ Financial Management In A Waiver Environment
____ Provider Performance Report and NC-TOPPS
____ Using The ASAM Criteria Placement Criteria
____ NC Tracks
____Transition To Supervision
____Congratulations…You Are A CABHA!!
____Using CDW For DD Wait List/IPRS Federal Reporting
____ Who Is The Legally Responsible Person?
____ Waiver Update: TCM/CAP MR/DD
____ Electronic Medical Records
____ From Incident Reporting To Outcome Measures
____ Consultant's Roundtable
____ Leveraging Community Resources
____ Marketing GPS-"Generating Practical Strategies"
____ QI Studies 101-How To Conduct Effective Studies
____Making Effective Organization Decisions
____ Collaboration With Physical Health: CCNC
____ 4010 To 5010: Don't Get Left In The Dust
____Health Care Reform And It's Impact On Employees
____ Detecting And Preventing Medicaid Fraud
____ HIPAA's Breach Notification Rule
____ The Future Direction of the NC MH/DD/SA System
____ After Accreditation: Now What?
____ CABHA Monitoring….The Next Steps

(Please print all information clearly)

NAME:____

TITLE:____

AGENCY:____

MAILING ADDRESS: ____

CITY: ___________________________________STATE:__________ZIP CODE:________________

PHONE: _________________________________E-MAIL:____

MEMBERSHIP STATUS:
(Note: check your "**2011**" membership status)

___ FARO **MEMBER** (LME / AP / PROVIDER / DHHS)
___ **NON-MEMBER** (LME / AP / PROVIDER / DHHS)
___ OTHER **NON-MEMBER**

CONFERENCE ATTENDANCE:

___FULL CONFERENCE (cannot split w/others)
___FREE 5th registration (include with 4 full paid registrations)
___ONE DAY (__Mon __Tue __Wed) (check day) (not included in count for free registration)