

# East Coast CORE

## Fall 2024 Meeting

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### **GAYLORD TEXAN RESORT**

**1501 GAYLORD TRAIL**

**GRAPEVINE, TEXAS 76051**

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### **WEDNESDAY, SEPTEMBER 25**

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- 3:00 PM -      **PB Best Practice Session**  
4:10 PM      *Jamie Murray, Operations and Finance Manager - University of Utah School of Medicine*  
Discuss hot topics with your best practice counterparts.
- 3:00 PM -      **HB Best Practice Session**  
4:10 PM      *Antonio Fonseca, Director, Patient Financial Services - UCSF Health*  
Discuss hot topics with your best practice counterparts.
- 3:00 PM -      **Executive Track**  
4:10 PM      *Candice Hoshi, VP of Revenue Cycle - UCHealth*  
*Scott Williams, Retired AVP*  
This is an invitation-only session for revenue cycle executives.
- 4:10 PM -      **Break**  
4:30 PM
- 4:30 PM -      **PAS Best Practice Session**  
5:30 PM      *Kim Pacheco, Director, Patient Access - University of Utah Health*  
*Claudia Peralta, Sr. Manager, Patient Access & Financial Counseling Stanford Healthcare*  
Discuss hot topics with your best practice counterparts.
- 4:30 PM -      **SBO Best Practice Session**  
5:30 PM      *Terri Meier, Assistant Vice Chancellor Revenue Cycle - University of Arkansas for Medical Sciences*  
Discuss hot topics with your best practice counterparts.
- 4:30 PM -      **RI Best Practice Session**  
5:30 PM      *Angie Labadie, Revenue Integrity Assistant Director - UCI Health*  
Discuss hot topics with your best practice counterparts.
- 5:30 PM -      **Networking Event sponsored by JP Morgan, Experian, Chartis, Hollis-Cobb, and Accuity at The Glass**  
**Cactus**  
9:00 PM

### **THURSDAY, SEPTEMBER 26**

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- 7:30 AM -      **Breakfast**  
8:30 AM

<u>8:30 AM –</u> <u>9:15 AM</u>	<b>Thursday Opening &amp; Logistics</b> <i>ECC + CORE Board Members</i>
<u>9:15 AM –</u> <u>9:20 AM</u>	<b>Meet Our Sponsor</b> 2 Sponsor intros
<u>9:20 AM –</u> <u>10:10 AM</u>	<b>Keynote Speaker</b> <i>Jonathan Efron, M.D., Executive Vice President for Health System Affairs - UT Southwestern Medical Center</i>
<u>10:10 AM –</u> <u>10:15 AM</u>	<b>Meet Our Sponsor</b> 2 Sponsor intros
<u>10:15 AM –</u> <u>10:30 AM</u>	<b>Break</b>
<u>10:30 AM –</u> <u>11:20 AM</u>	<p><b>Patient Access Authorization Vignette - 3 Mini-Session To Improve Your Authorization Workflows</b>  <i>Claire Skelley, Director of Denials - RWJ Barnabas Health</i>  <i>Lael Terry, Sr Director Revenue Cycle - RWJ Barnabas Health</i>  <i>Sharon Lee-Pollard, Director of Patient Financial Clearance - Stanford Health Care</i>  <i>Josie Cumagun, Sr Clinical Systems Analyst - Stanford Health Care</i>  <i>Jerome Gloria, Sr Manager of Patient Financial Clearance - Stanford Health Care</i>  <i>Mary Jane (MJ) Mendoza-Nop, Sr Manager of Authorization - Stanford Health Care</i></p> <p>1. Coordinating Authorizations and Notifications in Epic and Ensuring Timely Approvals and Reimbursements-- Attendees will gain a thorough understanding of how hospitals coordinate IP authorizations and ensure timely notifications using Epic, and Payer portals.</p> <p>2. Integrating Authorization Lead Times into Epic Scheduling Workflows-- This mini session will explore the integration of authorization lead times into Epic scheduling workflows, a proactive approach designed to ensure timely insurance authorizations in line with payor turnaround guidelines.</p> <p>3. From Planned to Performed: Streamlining Retro Authorization for Surgical Changes-- This mini session explores the development and implementation of a retro authorization process for surgical procedures, addressing the challenge of handling cases where the procedure performed differs from the one initially authorized.</p>
<u>10:30 AM –</u> <u>11:20 AM</u>	<p><b>Strategic Alignment to Core Functions with Metrics Reporting</b>  <i>Kelli Howard, Sr Manager of Revenue Integrity - Mayo Clinic</i>  <i>Salisha Hamid, Sr Manager of Revenue Integrity - Mayo Clinic</i>  <i>Amber Bartell, Sr Manager of Revenue Integrity - Mayo Clinic</i></p> <p>Outline of efforts to evaluate and define department core functions to better align the focus of Revenue Integrity and educate Revenue Cycle and Clinical Practices on the department's scope of work, while developing metrics for non-productivity-based work external to Epic management.</p>
<u>10:30 AM –</u> <u>11:20 AM</u>	<p><b>Crafting Dynamic Dashboards for Effective WQ Management and Improving User Productivity</b>  <i>Kalayer Winn, Director of Revenue Management - Geisinger Health System</i>  <i>Joseph James, Revenue Management System Lead - Geisinger Health System</i></p>

How do we build a culture of accountability, empowerment, collaboration, and innovation? Geisinger Revenue Management team will reveal their story! We'll delve into our transformation journey, starting with a burning platform. We'll cover how to leverage EPICs overview dashboards and tools to drive productivity while creating accountability and quality through WQ policy/Internal Control. We will demonstrate how Leadership engagement at all level and integration of these WQ expectations into Performance Evaluation system have enabled us to achieve our goals. Key results, accomplishments, Testimonial from the supervisor of Integrated WQ Management department, and future plans will be included.

11:20 AM –  
11:35 AM      **Break**

11:35 AM –  
12:25 PM      **Empowering Patient Access Excellence: Strategies and Skills for Success**  
*Alejandra Leonel Gaitan, Assistant Director Patient Access - UC San Diego Health*

This comprehensive training session is designed for patient access leaders, aiming to elevate their team's proficiency in managing patient interactions, data accuracy, and service quality.

11:35 AM –  
12:25 PM      **Reducing the Burden of Peer-to-Peers with a Dedicated Provider Resource**  
*Matt Rohrer, Assistant Director Patient Access - UW Health*

Learn about UW Health's approach to improving the burdensome peer-to-peer (p2p) process for providers and Patient Access staff. This session includes an overview of centralized prior authorization at UW Health, P2P reporting, creating the justification for a dedicated provider resource, Epic workflows, pilot outcomes, and more.

11:35 AM –  
12:25 PM      **Managing AR and Employee Engagement**  
*Kavita Mamtani, Associate Vice President in Patient Billing Office - Loma Linda University Health*

Steps taken to reduce AR, 90+aging and increase collections along with special focus on people growth, career progression, engagement, and connections. Presentation will include data driven outcomes and improvements in 2023.

12:35 PM –  
1:35 PM      **Lunch**

1:35 PM –  
1:40 PM      **Meet Our Sponsor**  
2 Sponsor intros

1:40 PM –  
2:30PM      **Bringing Analytics to Every Corner of your Revenue Cycle**  
*Jim Seiwert, Associate Vice President of the Consolidated Business Office - ProMedica Health System*

ProMedica was able to bring analytics and problem solving to every corner of their Revenue Cycle. This session shares a plug & play solution that leverages Epic's Informaticist coursework to expand analytics and problem solving across your Revenue Cycle.

2:30 PM –  
2:35 PM      **Meet Our Sponsor**  
2 Sponsor intros

2:35 PM –  
2:50 PM      **Break**

- 2:50 PM –      **How a centralized pro-fee coding department supports decentralized business operations**  
3:40 PM      *LaVonna Williams, Coding Manager - Intermountain Health (Peaks Region)*  
*Courtenay Rennick, Director of Coding - Intermountain Health (Peaks Region)*  
This session will outline strategies implemented by the Peaks Region of IMH to reduce revenue leakage, maximize charge capture, and reduce denials through collaborative efforts between the centralized PB Coding team and clinic business operations.
- 2:50 PM –      **Compassionate Collections: Integrating Emotional Intelligence into Point-of-Service**  
3:40 PM      *Kristi Morgan Turner, Director Pre-Service Teams - The University of Texas Medical Branch at Galveston*  
"Compassionate Collections" is UTMB's buzzword for being emotionally intelligent when we deliver and discuss patient liability. It is also the title of a standardized training presentation for all new hires and is refreshed every 2 years for all registration staff. We deliver a unique perspective on this topic and provide useful scenarios for registrars across our organization: Clinics, Inpatient/ED, and Procedural areas such as day surgery and cath lab.
- 2:50 PM –      **MyChart CRM - Patient Messaging Options**  
3:40 PM      *Sharita Lawson, Manager of MyChart, SBO Customer Service & Collections - Wellstar Health System*  
A messaging enhancement to MyChart that enables patients' selection of the appropriate option when submitting billing questions, instead of inadvertently sending clinical inquiries to the billing department. Assuring that patient's billing question option appeared clearly on MyChart, or that and communication regarding clinical matters (e.g., appointments, prescriptions, test results or other medical care) was directed to the physicians' clinical team. This implemented enhancement decreased 70% of clinical messages that were incorrectly routed to customer service billing by patients.
- 3:40 PM –      **Break**  
3:55 PM
- 3:55 PM –      **Meet Our Sponsor**  
4:00 PM              2 Sponsor intros
- 4:00 PM –      **General Session**  
5:00 PM      *Daron Larson, Mindfulness Coach*
- 5:30 PM –      **Networking Event sponsored by Acclara R1, R1 RCM, Mercury Global, Waystar, and State Collections at The Raleigh Underground**

## **FRIDAY, SEPTEMBER 27**

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- 7:30 AM –      **Breakfast**  
8:30 AM
- 8:30 AM –      **Friday Opening & Logistics**  
8:50 AM      *ECC + CORE Board Members*

8:50 AM –  
9:40 AM

### **Revenue Cycle Quick Wins Vignette**

*Sandra Manza, Sr Director Patient Access - Montefiore Medical Center*

*Michael Mercurio, VP, Revenue Cycle Operations - Mass General Brigham*

*Michael Laukaitis, Director of Rev Cycle Analytics, Accounting and Quality Assurance - UT Southwestern Medical Center*

1. ED Registration: Restructuring the staffing model by implementing a '1 stop' registration process with a result in reducing 11.4 FTE's and doubling the Point-of-Service collections in 6 months.
2. Top 10 Trick: UTSW will share their Top 10 Tips and Tricks to help make the revenue cycle a little less painful.
3. Dashboards: This session will highlight numerous dashboard and drilldown which Mass General Brigham uses to monitor performance and productivity as well as identify opportunities for improvement.

9:40 AM –  
9:55 AM

### **Break**

9:55 AM –  
10:55 AM

### **Updates from the Farm: New Epic Revenue Cycle Features & Programs**

*Epic*

Hear from the Epic team about “can’t miss” revenue cycle enhancements in the current release and on the horizon. Get Epic’s perspective on “cool” but less-frequently-used existing functions that everyone should be taking advantage of at their organization.

10:55 AM –  
11:10 AM

### **Break with Grab n' Go Snack Options**

11:10 AM –  
12:00 PM

### **Continued: Updates from the Farm**

*Epic*

Epic presentation continued + Q&A

12:00 PM

### **Adjourn**