2025 HOSPICE FINANCIAL ADMINISTRATION CONFERENCE
"Focusing on Details of Financial Administration"

October 16-17, 2025
Hilton Orlando Lake Buena Vista @ Walt Disney World Resort

The Health Group

Registration Now Available – See You in Orlando

PROGRAM INTRODUCTION

The Health Group, LLC is excited about revisiting Orlando for the 2025 Hospice Financial Administration Conference. The networking opportunities, coupled with the ability to react to the educational needs of attendees, make live programming so much more beneficial than webinars and other forms of distance education. We limit attendance at our programs to further enhance the benefits of the program.

The 2025 program will provide a more detailed focus than previous programs on many issues, including integrity management and reporting issues, current and anticipated. This is especially important now as CMS and federal legislators continue to focus on significant changes to the hospice benefit and payments for hospice services. This program is the most comprehensive hospice fiscal management program available.

The 2025 program, like past programs, is not directed to just fiscal management and accounting staff, but also others desiring a greater financial understanding of keys to hospice financial success including administrative personnel, outside consultants, and clinical management personnel. We encourage your early registration, as consistent with prior programs, space is limited to provide the maximum interaction with and between attendees. We hope you will be part of this event and look forward to seeing you in Orlando.

ABOUT THE HEALTH GROUP, LLC

The Health Group, LLC was formed in 2010. The professionals at The Health Group, LLC have provided quality financial and consulting services to healthcare providers for many years, as part of The Health Group, LLC, and previous associations, and have provided quality educational programming since 1993. On August 1, 2018, The Health Group, LLC affiliated with Gray, Griffith & Mays – Morgantown, PLLC to enhance audit, tax, and accounting services to healthcare clients. Currently, The Health Group, LLC serves healthcare clients in forty-four states and Puerto Rico, including several hundred hospices.

GENERAL PROGRAM INFORMATION

REGISTRATION – Registration is $795 for the two-day program. Register by August 15, 2025, and save $100 ($695). Additional attendees from the same organization save an additional $50 from published rates ($645 for early registration and $745 thereafter). Registration includes all materials, full buffet breakfast and lunch, as well as continuous refreshments, on both days of the program.

CONFERENCE CANCELLATIONS – The Health Group, LLC reserves the right to cancel any program due to circumstances that might arise. If such were to occur, all registration fees would be refunded; however, any cancellation by an attendee must be received by October 1, 2025, to receive a refund. Any cancellation received after that date will not be refunded but fees may be applied to a future program.

HOTEL RESERVATIONS – Special rates have been secured with the Hilton Orlando Lake Buena Vista; however, to secure these rates, call (407) 827-4000 and inform the hotel that you are attending the **"Hospice Financial Administration Conference"** or, more conveniently, secure your room online at https://book.passkey.com/e/50999662.

All attendees are offered Standard Rooms at $209/night and a reduced daily resort fee of $30, which includes shuttle transportation to/from Disney World Theme Parks and other services and amenities. The hotel is making the $209/night rate available for three (3) days prior to and three (3) days after the program dates.

GENERAL PROGRAM INFORMATION (continued)

The Health Group, LLC is a registered sponsor with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State Boards of Accountancy have the final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of Sponsors through its website **https://www.nasbaregistry.org/**.

Attendees can qualify for up-to fourteen (14) hours of continuing professional education. The program offers attendees 10.5 hours of credit in specialized knowledge and 3.5 hours of credit in accounting.

COMPLAINTS OR PROBLEMS – If any issues arise that need addressed (complaints, problems, or other issues), do not hesitate to contact us at (304) 241-1261 or **contact@healthgroup.com**. It is our intent to provide you with educational programs that meet or exceed your expectations.

SPACE IS LIMITED – Programs offered by The Health Group, LLC accepts a limited number of attendees to ensure the quality of the program and the best networking opportunities possible. We encourage you to register early.

THE PROGRAM

Thursday – October 16, 2025

Buffet breakfast and registration: 8:00 a.m. – 9:00 a.m.
Educational programming:

- The Current State and Future Direction of the Hospice Industry
  9:00 a.m. – 10:40 a.m. (2.0 hours CPE)
- Identification of Payment and Integrity Changes and the Impact on the Provision of Service, Administration and Finances
  10:45 a.m. – 12:00 p.m. (1.5 hours CPE)

Lunch buffet: 12:00 p.m. – 1:00 p.m.
Educational programming (concurrent sessions):

- Preparing or Assisting the Cost Report; a Detailed Dive into the Report, Data Needs, and Keys to Cost Report Accuracy
  1:00 p.m. – 4:10 p.m. (3.5 hours CPE)
- HOPE Tool; Submission Compliance, Impact, and Public Reporting
  1:00 – 2:15 p.m. (1.5 hours CPE)
- Conditions of Participation vs Conditions of Payments; Understanding the Difference
  2:30 – 4:10 p.m. (2 hours CPE)

Networking Reception: 4:15 p.m. – 5:15 p.m.

Friday – October 17, 2025

Buffet breakfast: 8:00 a.m. – 9:00 a.m.
Educational programming:

- Hospice Audits and Documentation: TPE, CERT, SMRC
  9:00 a.m. – 10:40 a.m. (2.0 hours CPE)
- Optimizing Revenue Cycle: Leveraging Data and Technology to Drive Financial Performance and Margin Growth
  10:45 a.m. – 12:00 p.m. (1.5 hours CPE)

Lunch buffet: 12:00 p.m. – 1:00 p.m.
Educational programming (concurrent sessions):

- Everything CAP: 1:00 p.m. – 4:10 p.m. (3.5 hours CPE)
- Enhancing Accounting and Financial Records for Financial Statements, Management Reporting, Tax Compliance, and Cost Reporting
  1:00 p.m. – 2:15 p.m. (1.5 hours CPE)
- Continued Expansion of Enrollment Reporting, Now and Going Forward
  2:30 p.m. – 4:10 p.m. (2.0 hours CPE)

THE PROGRAM (CONTINUED)

The Current State and Future Direction of the Hospice Industry - This program will provide a summary of the current conditions and circumstances impacting hospice providers and the delivery of hospice services. Additionally, attendees will be provided with examples of how hospice providers (proprietary and tax-exempt) are looking to modify and expand services to meet future patient needs as well as organizational changes to better secure financial viability into the future.

Identification of Payment and Integrity Changes and The Impact on the Provision of Service, Administration and Finances – The program will focus on current payment mechanisms as well as the underlying aspects for determining hospice payments for services. Attendees will also be provided with information concerning reimbursement and program integrity initiatives. Program and financial integrity are critical to continued ability to operate and be successful.

Preparing or Assisting the Cost Report; a Detailed Dive into the Report, Data Needs, and Keys to Cost Report Accuracy – Based on feedback from previous programs, the 2025 program will provide an increased focus (optional, concurrent session) on the process of cost report preparation and the data needed to prepare an accurate cost report. Attendees who provide information to an outside consultant will be better prepared to provide information in a manner that will better ensure the quality of the cost report submitted.

HOPE Tool; Submission Compliance, Impact, and Public Reporting – Currently the "Hospice Outcomes and Patient Evaluation" ("HOPE") tool is scheduled for implementation on October 1, 2025. Significant financial penalties will be imposed for those hospices not meeting the requirements for submission. This interactive session will address the HOPE timepoints, including clarification of sequencing and submission guidance, HOPE impact on the 2027 and 2028 annual payment update ("APU"), and the timeline for public reporting. The timing of this program will allow attendees to provide feedback on their early success, challenges, troubleshooting and corrections.

Conditions of Participation vs Conditions of Payments; Understanding the Difference - While the "State Operations Manual Appendix M – Guidance to Surveyors: Hospice" provides guidance to ensure hospices are compliant with the Hospice conditions of participation and related standards for survey readiness, hospices must also ensure documentation meets the hospice benefit coverage requirements to ensure claims are paid and/or not recouped under medical review audits. This session discusses the difference between the hospice conditions of payment and conditions of participation to ensure your agency is always survey ready and ADR/medical review audit ready. Discussion will provide tips for compliance, frequent denial reasons, and tips for survey readiness.

Hospice Audits and Documentation: TPE, CERT, SMRC - Being prepared for a hospice medical review audit regardless of type such as TPE, PPEO, SMRC, UPIC or RAC will ensure timely submission of documents and protect your agency's bottom line. From pre-payment denials to post-payment recoupment of payments, this session will cover all types of medical review audits and provide documentation "musts" tips, as well as guidance to "audit proof" your claims.

Optimizing Revenue Cycle: Leveraging Data and Technology to Drive Financial Performance and Margin Growth – Hospice providers face mounting pressure on their revenue cycle due to increasingly complex payor requirements, heightened regulatory scrutiny, and tightening margins. This session explores how strategic use of data and technology can transform revenue cycle management – from reactive reporting to proactive performance improvement. Attendess will gain insights into the key components of revenue cycle and learn how to harness digital tools to strengthen financial outcomes while supporting mission-driven care delivery.

Everything CAP – Over 20% of all hospices are now exceeding the aggregate payment limitation ("CAP") and state-administered hospice programs look to identify Medicaid CAP overpayments. Based on feedback from previous program attendees, this session has been expanded and will provide the most comprehensive hospice CAP coverage ever offered. Attendees will be provided an understanding of CAP computation, report submission, monitoring CAP liabilities, preparing for cash flow needs, and special CAP issues. Case studies will be provided to assist attendees to better understand the impact of claims denials on CAP, addressing CAP in hospice acquisitions and terminations, conversion from Streamlined to Proportional method, and more. Attendees will be provided with many take-away tools that can be used to better assess and manage CAP.

THE PROGRAM (CONTINUED)

Enhancing Accounting and Financial Records for Financial Statements, Management Reporting, Tax Compliance, and Cost Reporting – The financial records of a hospice must accumulate the information needed for preparing accurate financial statements; however, those records must also be sufficient in providing information to assist in managing the hospice as well as providing appropriate information for tax and cost reporting. Attendees will be provided information to assist them in developing and/or updating their records to meet these various financial reporting needs.

Continued Expansion of Enrollment Reporting, Now and Going Forward – This session will provide an update on the latest changes in Medicare enrollment and what has been learned because of the Medicare Administrative Contractor ("MAC") review of Enrollment, Revalidation, and Change of Information filings. Attendees will be able to respond to enrollment application requirements, make revalidation filings, and appropriately address the requirements of other enrollment submissions.

FACULTY

William T. ("Ted") Cuppett, CPA
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Ted Cuppett has over 30 years of experience serving healthcare clients. He was the Hospice/Home Health Niche Leader for Dixon-Hughes, PLLC from 2001 until August 2010 and serves all types of healthcare clients. His experience includes auditing, strategic planning, corporate compliance, reimbursement, litigation support, mergers and acquisitions, and tax filings. Ted is a frequent speaker for national and state healthcare organizations and authors on healthcare financial matters. He served on the AICPA "Healthcare Expert Panel", the "Healthcare Audit and Accounting Guide Revision Task Force", and numerous committees and task forces of the AICPA. Ted currently maintains memberships in numerous organizations including the AICPA and American Health Lawyers Association.

J. Ryan Lindsay, CPA
rlindsay@ggmcpa.net

Ryan Lindsay, CPA, CHFP, CGMA, a current Director at Gray, Griffith & Mays, a.c., has over 20 years of experience in accounting, auditing, tax, and consulting services. He currently focuses on attestation engagements, compliance, prospective financial statements, and strategic planning. A sizable portion of his practice is serving healthcare providers. Effective August 1, 2018, Ryan became a Director with The Health Group, LLC, focusing considerable time on the healthcare clients currently served by The Health Group, LLC in addition to the healthcare clients at Gray, Griffith & Mays, a.c. He is a member of the AICPA, Healthcare Financial Management Association, and West Virginia Society of CPAs.

FACULTY (CONTINUED)

Victoria Barron, MBA, BSN, RN, COS-C
vbarron@healthcareprovidersolutions.com

Victoria Barron provides support and solutions to home health and hospice providers to achieve regulatory compliance. HPS provides financial, reimbursement, billing, operational, and clinical consulting to the home care and hospice industries. Victoria is experienced in operations, clinical and billing compliance, data analytics, and process development and implementations. In home health and hospice, she has served as agency administrator, interim administrator, clinical director, surveyor, mock surveyor, QAPI team member and consultant. She is experienced in many areas including billing and clinical reviews, Targeted Probe and Educate, and policy review and development.

David Brooks
dbrooks@withum.com

David Brooks, CPA, is a Principal in Withum's Healthcare Advisory Practice. David has over 15 years of experience servicing the healthcare industry. David has deep operational expertise, having serviced his clients in various interim executive roles, including interim Chief Financial Officer (CFO) for several not-for-profit hospices. He has significant experience in revenue cycle optimization, system turnarounds, expense and productivity management, and organization change and process redesign. In addition, he has made substantial improvements to organization's accounting close processes, streamlined reconciliation processes, and enhancement to the finial reporting & decision support functions.

FACULTY (CONTINUED)

Christy Conaway
christy.conaway@healthgroup.com

Christy Conaway is a manager with The Health Group, LLC. Her primary focus for over 25 years has been serving healthcare clients, including hospitals, nursing homes, RHC/FQHCs, home health agencies and hospices. Christy principally provides cost reporting, CAP reporting, CMS 855 filings and related services and has become a frequent speaker on these subjects. Other experience includes nonprofit tax return preparation and financial statement audits and compilations. Christy is a member of numerous professional organizations including the American Health Lawyers Association (AHLA), Health Care Compliance Association (HCCA) and Home Care and Hospice Financial Management Association (HHFMA).

Dan Gerena
dgerena@withum.com

Dan Gerena is a Principal with Withum. His primary focus for over 25 years has been supporting healthcare clients, including hospitals, nursing homes, palliative care providers and hospices. Dan leads the Digital Practice at Withum, enabling Business Intelligence (BI) and Analytics implementations for provider organizations, many of which have never had such capabilities previously. Dan is a frequent speaker and subject-matter expert in regard to enabling technology to leverage data as a strategy to improve clinical operations, financial performance and revenue cycle management.

FACULTY (CONTINUED)

Amanda Makon
amanda.makon@healthgroup.com

Amanda Makon is a Senior Associate with The Health Group, LLC with over 20 years of experience in accounting. Her primary focus at the firm is serving hospice and home health agency clients. During the past ten years with The Health Group, LLC, Amanda has principally provided cost reporting, CAP reporting, and reimbursement-related services. Other healthcare client experience includes accounting and financial statement services. Amanda is a member of numerous professional organizations including the Home Care and Hospice Financial Management Association (HHFMA), and Health Care Compliance Association (HCCA).

PROGRAM REGISTRATION

To register, remit payment and this completed registration form to The Health Group, LLC, 400 Fort Pierpont Drive, Suite 202, Morgantown, WV 26508, fax to (304) 241-1265 with credit card information, email with credit card information to conference@healthgroup.com, **or call us at (304) 241-1261.**

On-site registrations are not accepted. Registration on or before August 15, 2025, is $695 for the first individual and $645 for additional individuals from the same organization. After August 15, 2025, registration is $795 for the first individual and $745 for additional individuals from the same organization.

Name of Attendee (As it should appear on name badge)	**E-Mail**	**Cost of Program**
	Total:	**$**

Organization_______________________________ Telephone____________________

Credit Card Billing Address ____

City _________________________________ State______________ Zip________________

Please fill in amount enclosed:

Registration fee(s) $ ______________________ ☐ Check enclosed ☐ Bill my credit card

Visa Card # ___________________________ Master Card # ______________________________

Name of Cardholder____ Exp. Date _____________

Signature of Cardholder ______________________________________ Date _________________