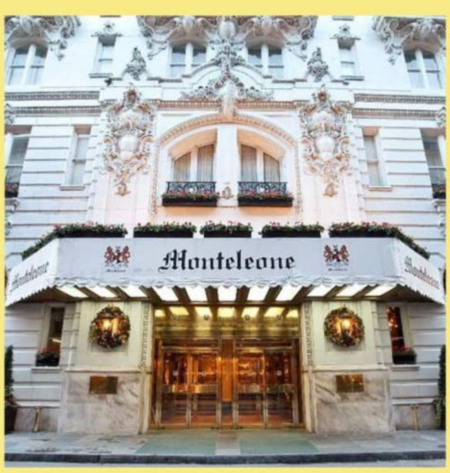
2019 Hospice Financial Management Academy

September 9-10, 2019

Presented by:

The Health Group



Hotel Monteleone
New Orleans, LA

ABOUT THE HEALTH GROUP, LLC

The Health Group, LLC was formed on August 1, 2010 by William T. (Ted) Cuppett, CPA, formerly a Member and Home Health/Hospice Niche Leader with Dixon Hughes, PLLC. Additional information on The Health Group, LLC is available at **www.healthgroup.com**. The professionals at The Health Group, LLC have been providing quality education to healthcare providers, CPAs and consultants to healthcare providers since 1993. These educational programs are intended for administrative and financial staff of healthcare providers and their external financial advisors. The programs are continually modified based on current developments and are enhanced based on the needs expressed by conference attendees. They are designed to provide focus on issues of importance and provide interactive discussion to enhance the benefits to the attendees. On August 1, 2018, The Health Group, LLC affiliated with Gray Griffith & Mays – Morgantown, PLLC to enhance audit, tax, and accounting services to its healthcare clients.

General Information

CONTINUING PROFESSIONAL EDUCATION

The Health Group, LLC is registered 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 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: **www.nasbaregistry.org**.

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 for that program would be refunded; however, any cancellation by an attendee must be received 15 days prior to the conference in order to receive a refund. Any cancellation received after that date will not be refunded. An administrative fee of $50 is charged on all cancellations.

HOTEL RESERVATIONS

Special rates have been secured with the Hotel Monteleone; however, to secure these rates, you must inform the hotel that you are attending The Health Group, LLC program (Hospice Financial Management Academy) when making reservations. These special room rates are only available through August 12, 2019. Online reservations can be made https://www.phgsecure.com/IBE/bookingRedirect.ashx?propertyCode=MSYHM&style=5&group=HEA09I&arrivalDate=09/07/2019 or by contacting the Hotel Monteleone at 1-800-217-2033.

REGISTRATION INFORMATION

Registration is $595 for the two-day program. Register by July 15, 2019 and save $50 ($545). Additional attendees from the same organization save an extra $50 from published fees, or $100 on an early registration of $495 for the two-day program. Fees include all materials, buffet breakfast, buffet lunch, and refreshments on both days of the program. Registration and buffet breakfast will be from 8:00 a.m. until 9:00 a.m. The program begins at 9:00 a.m. on both days.

COMPLAINTS OR PROBLEMS

If any issues arise that need addressed (complaints, problems, or other issues), do not hesitate to contact William T. ("Ted") Cuppett at (304) 241-1261 or **ted.cuppett@healthgroup.com**. It is our intent to provide quality education programs.

PROGRAM DETAILS

HOSPICE RATE REBASING - COST REPORTING UPDATE WITH FOCUS ON DATA USE AND REBASING

CMS has released the draft Hospice 2020 Payment Rule, which should be finalized before the September 9-10, 2019 program. The proposed rule provides for a substantial shift in Medicare payment rates based on the Hospice Cost & Data Report submission. While the rebasing was expected, it was not generally expected to happen so quickly. This session will discuss the financial implications and financial strategies relating to the rebasing. It will also focus on those key aspects of the Hospice Cost & Data Report which will influence future reimbursement rates. Hospices have the ability to shape their future financial reimbursement. This program is intended to accomplish the following:

- Provide attendees with an understanding of the causes and calculations behind rebasing, including the errors in CMS assumptions.
- Provide attendees with an understanding of the financial implications of rebasing and recognition of strategies caused by rebasing.
- Assist attendees in developing strategies for improving cost finding and impacting future rate setting.
- Allow attendees to enhance previously reported information for enhancing outcomes.
- Provide attendees with guidance on overcoming those cost reporting issues identified by CMS and other cost reporting problem areas.

Program hours are from 9:00 am through 12:10 pm on Monday, September 9, 2019
Speakers: William T. Cuppett, CPA, Keith Myers, CPA and Amanda Makon
CPE: 3.5 CPE credits (Specialized Knowledge)
Delivery Method: Group-Live
Program Level: Basic
Prerequisite: None
Advance Preparation: None

PAYMENT RISK UPDATE; ZPIC, TARGETED PROBE AND EDUCATE, AND MORE

This session will focus on assisting hospices in gauging their level of risk and, accordingly, assist them in minimizing claims risk. Carrie will provide attendees with the lessons learned by providers that have been subjected to ZPIC, targeted probe and educate ("TPE"), and other types of audits. These lessons will provide the keys to be successful when claims are being scrutinized. This program is intended to accomplish the following:

- Provide attendees with an understanding of current ZPIC, TPE, and claims payment risk issues and process.
- Enable attendees to gauge levels of risk using data readily available and provider-generated data for comparison to CMS monitoring.
- Assist providers in minimizing risk and recognizing key processes, including helpful examples, in reimbursement protection.

Program hours are from 1:00 pm through 2:15 pm on Monday, September 9, 2019
Speaker: Carrie Cooley, RN, MSN
CPE: 1.5 CPE credits (Specialized Knowledge)
Delivery Method: Group-Live
Program Level: Basic
Prerequisite: None
Advance Preparation: None

CAP REPORTING AND UPDATED LIABILITY ASSESSMENT

The number of hospices exceeding the aggregate payment limitation ("CAP") continues to increase for a variety of reasons. Even though the average amount by which hospices exceed the CAP continues to decline, every year hospices that never exceeded the CAP find themselves with a Medicare repayment obligation. The Health Group, LLC is significantly involved in CAP Reporting, estimating current and potential CAP liabilities, and assisting with strategies to reduce or eliminate CAP liabilities. Many hospice providers have difficulty estimating CAP liabilities. We are continually enhancing our CAP liability monitoring processes as well as the estimation processes. This program is intended to accomplish the following:

- Provide attendees with an understanding of the CAP and its impact on provider finances and Medicare reimbursements including updates on CAP liability determination.
- Enable attendees to use various techniques for identification of potential CAP overpayments (CAP liability drivers, i.e. lifetime length of stay, and the trending of total payments compared to the CAP).
- Provide attendees with new methods for interim and year-end estimation of CAP liabilities.
- Allow attendees to recognize both the geographical CAP discrimination and differences in application by the respective MACs.

Program hours are from 2:30 pm through 4:10 pm on Monday, September 9, 2018
Speaker: William T. Cuppett, CPA
CPE: 2.0 CPE credits (Specialized Knowledge)
Delivery Method: Group-Live
Program Level: Basic
Prerequisite: None
Advance Preparation: None

AMAZON, BOOMERS AND NEW REGULATIONS: HOW INDUSTRY TRENDS WILL CHANGE THE FUTURE OF HOSPICE

This session will focus on the changing landscape of the healthcare delivery system. New providers, changes in healthcare delivery, increased focus on non-institutional care, government budgetary constraints, and other factors require progressive thinking to succeed. Discussion will include staffing challenges, current and expected regulatory changes, and changing demographics that will drive change in the delivery of hospice as well as the providers of care. This session is intended to be entertaining and informative.

Program hours are from 9:00 am through 10:15 pm on Tuesday, September 10, 2019
Speaker: Ryan Lindsay, CPA, CHFP, CGMA
CPE: 1.5 CPE credits (Specialized Knowledge)
Delivery Method: Group-Live
Program Level: Basic
Prerequisite: None
Advance Preparation: None

PROVIDER ORGANIZATIONAL STRUCTURES; ALTERNATIVES AND IMPLICATIONS

This program will focus on taxable and non-taxable organizational structures (hospice), how reorganizations accomplish objectives, multiple organizational structure reporting, and organizational issues of importance in acquisitions or service expansions. This program is intended to accomplish the following:

- Provide attendees with an understanding of common organizational structures for taxable and tax-exempt organizations.
- Provide attendees with guidance on Medicare reporting implications of multi-organizational structures, including related party transactions.
- Provide comparisons of tax reporting for various organizational types, including discussion of unusual structures to accomplish certain objectives.
- Provide attendees with an understanding of organizational issues, including tax, in an acquisition or service expansion.

Program hours are from 10:30 am through 12:10 pm on Tuesday, September 10, 2019
Speaker: William T. Cuppett, CPA
CPE: 2.0 CPE credits (Specialized Knowledge)
Delivery Method: Group-Live
Program Level: Basic
Prerequisite: None
Advance Preparation: None

HEALTHCARE (HOSPICE FOCUS) FINANCIAL REPORTING UPDATE

The financial reporting update program will focus on key financial reporting issues impacting healthcare providers, with a focus on hospice and hospice providers. Several key changes have been made to generally accepted accounting principles, some of which are inconsistent with or impact Medicare reporting. Additionally, recognizing the importance and type of internal reporting information is critical to financial success. This program is intended to accomplish the following:

- Provide attendees with an understanding of significant GAAP changes, i.e. revenue recognition, accounting for capital leases, etc.
- Discuss illustrative external financial statements and alternatives to reporting operating results.
- Provide attendees with sample internal statements for monitoring operations and financial position.
- Demonstrate flash reports and the value of these reports for Boards, owners, and others.
- Allow attendees to identify differences in financial reporting and Medicare reporting.
- Provide attendees with information to assist with external accountants and auditors.

Program hours are from 1:00 pm through 2:15 pm on Tuesday, September 10, 2019
Speakers: Ryan Lindsay, CPA, CHFP, CGMA
CPE: 1.5 CPE credits (Accounting)
Delivery Method: Group-Live
Program Level: Basic
Prerequisite: None
Advance Preparation: None

MEDICARE ENROLLMENT, UPDATING ENROLLMENT, AND NEW REQUIREMENTS TO BE POSTED MARCH 1, 2020

This program will focus on the common enrollment issues encountered by hospice providers, current efforts by CMS and the Medicare Administrative Contractors ("MAC") regarding enforcement, and new areas of focus by reviewers. Specifically, the program will:

- Provide attendees with an understanding of when information must be reported.
- Enable attendees to establish a program for monitoring changes that need to be reported.
- Prepare providers for those issues under critical focus by the MACs in their review process.
- Provide attendees with the most current information available on proposed enrollment changes scheduled for March 1, 2020, including strategies for preparing for these changes.

Program hours are from 2:30 pm to 4:10 pm on Tuesday, September 10, 2019.
Speaker: Christy D. Conaway and William T. Cuppett, CPA
CPE: 2.0 CPE credits (Specialized Knowledge)
Delivery Method: Group-Live
Program Level: Basic
Prerequisite: None
Advance Preparation: None

SPEAKERS

William T. (Ted) Cuppett **Christy D. Conaway** **J. Ryan Lindsay**

Ted Cuppett, CPA has over 30 years of experience serving 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, providing a vast array of accounting, auditing, tax and consulting services. Clients served include hospitals, nursing homes, hospices, home health agencies, physicians and clinics, and others. His experience with healthcare providers includes auditing, strategic and organizational planning, corporate compliance, reimbursement, litigation support, mergers and acquisitions, and tax filings for taxable and tax-exempt entities. Ted is a frequent speaker for national and state healthcare organizations and frequently authors on healthcare financial matters. He served on the AICPA "Healthcare Expert Panel" and the "Healthcare Audit and Accounting Guide Revision Task Force". He is a previous member of the AICPA MCS Executive Committee, MCS Practice Standards Subcommittee, and numerous healthcare committees and task forces of the AICPA. Ted currently maintains memberships in numerous organizations including the AICPA and American Health Lawyers Association.

Christy Conaway has over 20 years of experience in public accounting. Her primary focus at the firm is serving healthcare clients, including hospitals, nursing homes, RHC/FQHCS, home health agencies and hospices. During the past 10 years, Christy has principally provided cost reporting 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. Her experience with a variety of healthcare providers and services to those providers enhances all the services with which she is associated and provides substantial benefit to attendees at education programs. Christy is a member of numerous professional organizations including the American Institute of Certified Public Accountants (AICPA), Healthcare Financial Management Association (HFMA), Health Care Compliance Association. (HCCA), American Health Lawyers Association (AHLA), and West Virginia Society of Certified Public Accountants (WVSCPA).

Ryan Lindsay, CPA, CHFP, CGMA, a current Director at Gray Griffith & Mays, a.c., has over 15 years of experience in accounting, auditing, tax, and consulting services. He currently focuses on attestation engagements, compliance, prospective financial statements, and strategic planning. A significant portion of his practice is serving healthcare providers. Effective August 1, 2018, Ryan will be a Director with The Health Group, LLC, focusing significant 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.

SPEAKERS

Carrie Cooley

Keith Myers

Amanda Makon

Carrie Cooley is the Principal/Chief Executive Officer and co-owner of Weatherbee Resources.

Carrie's regulatory expertise and extensive consulting experience includes forensic clinical record auditing, baseline compliance audits/mock surveys, interim management, clinical due diligence, and executive coaching. Carrie also works directly with clients' legal counsel in preparation for arbitration and other hearings; she serves as an expert witness.

Weatherbee Resources has assisted hundreds of clients under investigation by Zone Program Integrity Contractors (ZPIC), Benefit Integrity Support Centers (BISC), Recovery Auditors (RA), the Department of Justice (DOJ), and OIG. As a member of Weatherbee's Speaker's Bureau, Carrie teaches a broad range of hospice, regulatory, and leadership-related topics nationally and is a member of the faculty for Weatherbee's renowned Hospice Regulatory Boot Camps. Carrie also frequently speaks at state and national hospice conferences on compliance-related topics. Carrie is a registered nurse and holds a master’s degree from Samford University with a specialty in nursing leadership and healthcare finance.

Keith Myers, CPA has 30 years of experience in public accounting and private industry, including serving as Controller for a regional company with responsibility for financial statement preparation and reporting to management and investors. He spent several years of his career as a financial advisor with Edward Jones Investments and operating his own individual CPA practice. Other experience includes working directly for healthcare providers, including nursing homes, hospitals, and DME; providing accounting and financial reporting activities. Keith joined The Health Group, LLC in 2015 and provides accounting, tax, and cost reporting support services. Keith is a member of both the AICPA and West Virginia Society of CPAs.

Amanda Makon is a Senior Associate with The Health Group, LLC with over 14 years of experience in accounting. Her primary focus at the firm is serving hospice and home health agency clients. During the past four years with THG, Amanda has principally provided cost reporting, CAP reporting, and reimbursement-related services. Other healthcare client experience includes small business accounting and bookkeeping, as well as financial statement compilations. Amanda is a member of numerous professional organizations including the American Institute of Certified Public Accountants (AICPA), Healthcare Financial Management Association (HFMA), Health Care Compliance Association. (HCCA), and West Virginia Society of Certified Public Accountants (WVSCPA).

The Carousel Lounge and Piano Bar

History

Hotel Monteleone was named after Antonio Monteleone, an industrious immigrant from Sicily who owned a successful shoe factory. He arrived in the United States in 1880 and started a cobbler shop on Royal Street. After 6 years, he had enough money to buy a hotel on the corner of Iberville and Royal Streets. Fast forward today, four generations of the Monteleone family have dedicated themselves to keeping the hotel alive and it has become one of the must-visit places in the French quarter. Since the hotel opened, there have been 5 major additions. More than 50 guest rooms have been added, as well as a new building which houses facilities such as the cocktail lounge, ballrooms and dining rooms.

About

Hotel Monteleone has 600 rooms which include 55 suites and guests can choose from smoking to non-smoking accommodations. All rooms have been refurbished and have luxury bath products and marble and granite floors and counter tops. The standard rooms are the smallest with king or double beds. Superior rooms are larger with king-sized beds or two double beds with limited view. Deluxe rooms feature one king or two double beds with views of the Mississippi River or the French Quarter. Deluxe suites are one-bedroom suites with king-sized beds. The hotel also has a collection of luxurious Author's suites which pay homage to some of the country's greatest writers, including Truman Capote, William Faulkner, Ernest Hemingway and Eudora Welty.

Guests can start their day at the Le Café, home of New Orleans' finest buffets breakfasts. The Aft-Deck Oyster Bar and Restaurant offers some of the freshest seafood in town. The Hunt Room Grill serves dinner daily and feature Continental cuisine with a unique New Orleans flavor. Guests who would like to cap off the night with a few cocktails can go to The Carousel Piano Bar and Lounge.

Registration Information

To register, remit payment and this completed registration form to The Health Group, LLC, 6220 Mid-Atlantic Drive, Morgantown, WV 26508, fax to (304) 241-1265 with credit card information, or email with credit card information to conference@healthgroup.com. **On-site registration will not be accepted. Registration on or before July 15, 2019 is $545 for the first individual and $495 for additional individuals from the same organization. After July 15, 2019, registration is $595 for the first individual and $545 for additional individuals from the same organization.**

Name of Attendee (as it should appear on badge)	**E-Mail**	**Cost of Program**

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 ______________

Sorry – We do not accept American Express or Discover