

**HBMA**  
*Healthcare*  
**BILLING & MANAGEMENT**  
*Association*

.....  
T H I R D   A N N U A L

# EHR Summit

WEDNESDAY – FRIDAY, NOVEMBER 16-18, 2011

TALKING STICK RESORT • SCOTTSDALE, AZ

.....



2011



# ➔ Talking Stick Resort

**Reservations: 866-877-9897. Call before the cut-off date of October 25, 2011.**

With world class gaming, gourmet dining, first-rate entertainment, more than 100,000 square feet of function space, 497 luxurious guest rooms and a state-of-the-art spa, Talking Stick Resort promises to be the jewel of the Arizona desert.

Talking Stick Resort offers the luxuries of a resort while providing guests with options for unmatched entertainment. In addition to relaxing in one of the 497 guestrooms, our guests enjoy several upscale amenities including rejuvenating open-air Spa at Talking Stick, five world-class restaurants, seven entertainment lounges, a 240,000 square foot casino, full-service pool, two championship golf courses (Troon Golf) and more than 100,000 square feet of indoor/outdoor function space.

After soaking up the Arizona sun, poolside guests can relax in the 13,000 square foot rejuvenation center The Spa at Talking Stick. Located on the 14th floor the open-air spa features 11 private massage rooms, steam baths, relaxation serenity lounges and a 24-hour fitness facility. All this in one venue? Absolutely! Join us as we elevate your senses.

## **GETTING THERE**

Talking Stick Resort is a short 15 minutes from Phoenix Sky Harbor Airport. The resort is offering HBMA guests special rates of \$139, plus tax, single/double occupancy. Included is complimentary wireless Internet in guest rooms, meeting space and public areas; complimentary self & valet parking; and access to the fitness center.



# ➔ Newcomer's Session\*

Becoming the Trusted Advisor with Ron Sterling

**WEDNESDAY, NOVEMBER 16, 2011 | 8:00 am - 5:00 pm**

## **LEARNING OBJECTIVES:**

- Review the concept, strategy, and objectives of becoming an EHR trusted advisor
- Create for members and review a readiness assessment questionnaire
  - Leadership Assessment
  - Team Assessment
  - Computer Skills Assessment
- Components of an EHR
  - Similarities between EHR's
- CCHIT Similarities, MU Similarities, Similar tools: Surescripts, SNOMED, etc.
- Types of EHR's from Ron's existing presentation
  - What makes an EHR unique
- Content
  - Implementation Strategies
  - Support
  - Prepare your Practice for Change
    - Checklist or PP presentation for members to use to prepare their clients for the transformation
    - Use a case study to introduce changes occurring within a practice
    - Checklist for overcoming resistance
  - Training and Implementation Geared Toward Meaningful Use
  - Determining the Practice Technical Requirements
    - Network Assessments
    - Compilation of Inventory
    - Assess needs for new equipment

DAY ONE

\* FREE to HBMA members with paid registration to the full conference. Non-member price for this event is \$199. The Wednesday program includes 8 hours of education as well as continental breakfast, lunch, breaks and reception with exhibitors from 5:00 - 6:30pm.

## ➔ Schedule of Events

### Becoming the EHR Administrator

#### **THURSDAY, NOVEMBER 17, 2011**

8:00 – 10:00 am ..... **KEYNOTE:** EHR: Where are we today? – *Ron Sterling*

10:00 – 10:30 am ..... Break with Exhibitors

10:30am – Noon ..... Breakout Sessions

#### **VENDOR SELECTION** (*Mark Anderson*)

- Strategies to narrow the field
- Be prepared to request and receive client specific demonstrations
- Vendor Negotiations
- Contractual Considerations

#### **MEDICAL LEGAL CONSIDERATIONS: HOW TO IDENTIFY, ASSESS AND ACT ON EHR COMPLIANCE OPPORTUNITIES** (*Reed Gelzer, MD*)

- Risk Assessment
- Content Development
- Misuse of an EHR
- Audit Trails and Discovery

Noon – 1:00 pm ..... Networking Lunch (Discussion at tables by Levels 1 – 5)

1:00 – 3:00 pm ..... Breakout Sessions

#### **AN INSIDER'S PERSPECTIVE** (*Dave Jakielo*)

#### **TRAINING FOR MEANINGFUL USE** (*Ron Sterling*)

- Includes steps for validating Numerator and Denominator
- Addresses calculating “Transitions of Care”
- Provides depth in guidance of conducting a Security Risk Analysis

3:00 – 4:00 pm ..... Break with Exhibitors

4:00 – 5:30 pm ..... **GENERAL SESSION:** REC and HIE Update

5:30 – 7:00 pm ..... Networking Reception



# ➔ Schedule of Events

## Becoming the EHR Re-Engineer

Three options will be offered during each session throughout the day. You do not need to 'follow' any one track exclusively. You will be requested to pick-and-choose from the three tracks to attend the one event for each session that best fits your needs.

- A** EHR Implementation and Beyond with *Margret Amatayakul*
- B** Moderated Roundtables with *Mark Anderson*
- C** Vendor Demonstrations

### FRIDAY, NOVEMBER 18, 2011

- 8:00 – 9:15 am ..... **CONCURRENT SESSIONS**
- A** Market Need for Help with EHR
  - B** Moderated Roundtable: Vendor Evaluation
  - C** Demo Sessions with Participating Vendors
- 9:15 – 10:30 am ..... **CONCURRENT SESSIONS**
- A** Workflow and Process Management for EHR
  - B** Moderated Roundtable Discussions (Stages 1 & 2)
  - C** Demo Sessions with Participating Vendors
- 10:30 – 10:45 am ..... Break
- 10:45 am – Noon ..... **CONCURRENT SESSIONS**
- A** EHR Implementation Planning
  - B** Moderated Roundtable Discussions (Stage 3)
  - C** Demo Sessions with Participating Vendors
- Noon – 1:00 pm ..... Networking Lunch
- 1:00 – 2:15 pm ..... **CONCURRENT SESSIONS**
- A** EHR Implementation Support
  - B** Moderated Roundtable Discussions (Stages 4 & 5)
  - C** Demo Sessions with Participating Vendors
- 2:30 – 3:45 pm ..... **CONCURRENT SESSIONS**
- A** EHR Adoption and Ongoing Support
  - B** Roundtable discussion – *Topic TBD*
  - C** Demo Sessions with Participating Vendors
- 3:45 – 5:00 pm ..... **CONCURRENT SESSIONS**
- A** EHR Optimization, Meaningful Use, Health Reform
  - B** Roundtable discussion – *Topic TBD*
  - C** Demo Sessions with Participating Vendors



NOVEMBER 16-18, 2011 · SCOTTSDALE, AZ

DETAILS

# Concurrent Sessions


**A** SESSIONS – FRIDAY, NOVEMBER 18, 2011

## EHR Implementation and Beyond with Margret Amatayakul

### Market Need Your Help with EHR

#### OBJECTIVES:

- Identify ways billing and management companies can aid practices in achieving success with EHR
- Make the business case for supportive services by addressing EHR myths, identifying opportunities for practices, and realistically scoping support needs
- Prepare to help a practice plan and organize the EHR project
- Review critical success factors for vendor selection and contract negotiation
- Distinguish between implementation, adoption, and optimization of EHR

### Workflow and Process Management for EHR

#### OBJECTIVES:

- Describe the purpose for documenting current workflows and processes
- Discuss the importance of redesigning workflows and processes for EHR
- Identify practice workflows and processes impacted by EHR
- Review workflow and process mapping techniques
- Prepare for workflow changes throughout the practice

### EHR Implementation Planning

#### OBJECTIVES:

- Describe the scope of EHR in small vs. large practices and the range of vendor offerings, and anticipate how support services will vary
- Identify project planning considerations
- Conduct workflow and process mapping, redesign, and implementation
- Plan for chart and data conversions
- Identify and plan for interfaces
- Identify resources for standards and naming conventions
- Address hardware, network, data storage, security, and physical layout considerations

### EHR Implementation Support

#### OBJECTIVES:

- Describe and prepare to participate in software installation, set up, and system configuration
- Develop a training plan and prepare to provide training for super users and end users
- Develop a testing plan and prepare to test redesigned interfaces; workflows and processes; data for v5010 transactions, code sets, and operating rules; and code capture and migration to ICD-10-CM/PCS
- Develop a roll out strategy
- Prepare a practice for go-live
- Develop means to provide support to new users

### EHR Adoption and Ongoing Support

#### OBJECTIVES:

- Discuss the difference between implementation vs. adoption
- Monitor meaningful use of EHR and documentation for incentives
- Create and implement techniques to monitor success of goal achievement
- Plan to celebrate achievement of all milestones
- Plan to correct course where indicated
- Monitor vendor service
- Ensure regular upgrades

### EHR Optimization, Meaningful Use in Health Reform

#### OBJECTIVES:

- Compare adoption and optimization
- Encourage and support clinical transformation
- Prepare to identify and aid in responding to new initiatives

# Concurrent Sessions



**B** SESSIONS - FRIDAY, NOVEMBER 18, 2011

## Moderated Roundtables with Mark Anderson

These sessions have been set up to accommodate those attendees who are at various stages of their EHR implementation. Review the information provided below to determine what stage your company is in, or would like to reach. Feel free to register for the session that fits your situation best.

### General Description of the 5 Levels of EHR Adoption

**LEVEL 1** HBMA member is not interested in selling or supporting EHR applications for their clients. The HBMA member has no real interest in interfacing with the practice's EHR product.

**LEVEL 2** The HBMA member is interested in helping their clients with EHR selection by providing a short list of preferred EHR vendors. The member will interface their client's preferred EHR product if the client selects one of the preferred EHR vendors. EHR vendors not on the preferred list would not be interfaced and would be discouraged. The HBMA member is not interested in selling, product demonstrations, and is not interested in installation and supporting the client's preferred EHR.

**LEVEL 3** The HBMA member is interested in helping their clients with EHR selection by providing a short list of preferred EHR vendors and will coordinate the sales and product demonstrations with the EHR vendor(s). The HBMA member is interested in interfacing their client's EHR product with their current billing product and will interface with more than one EHR product. The HBMA member is interested in providing first line support of the EHR product.

**LEVEL 4** The HBMA member is interested in becoming a Value Added Reseller for one or more EHR products that can be interfaced with the HBMA member's preferred PM product. The HBMA member provides EHR selection leadership, product demonstrations, installation, product configuration, training and product support.

**LEVEL 5** The HBMA member has already established their organization as one of the top Value Added Resellers for multiple EHR products and is now willing to assist other HBMA members with their EHR marketing plans. A level 5 HBMA member is truly a technology company and has a strong technology workforce to go along with their billing experience.

# Concurrent Sessions



**C** SESSIONS - FRIDAY, NOVEMBER 18, 2011

## Vendor Demonstrations

These sessions have been set up to accommodate those attendees who are interested in viewing a variety of systems offered. You will have the opportunity to attend sessions for 6 vendors on Friday - all of these demon-

strations will be limited to 10 attendees per session. Each vendor who chooses to do so will be on-site to offer a demonstration of their product all day on Friday.

NOVEMBER 16-18, 2011 · SCOTTSDALE, AZ

## Registration Form

Please complete and submit a separate Registration Form for **EACH** Attendee.

Register online at [www.hbma.org](http://www.hbma.org) or return this form with your payment to HBMA.

First Name \_\_\_\_\_ Last Name \_\_\_\_\_  CHBME  
 Title \_\_\_\_\_ HBMA Member # \_\_\_\_\_  
 Company Name \_\_\_\_\_  
 Address \_\_\_\_\_  
 City \_\_\_\_\_ State/Province \_\_\_\_\_ Zip/Postal Code \_\_\_\_\_  
 Phone Number (\_\_\_\_\_) \_\_\_\_\_ Fax (\_\_\_\_\_) \_\_\_\_\_  
 Email Address \_\_\_\_\_ Website \_\_\_\_\_  
 In case of an emergency, please contact \_\_\_\_\_  
 Phone Number (\_\_\_\_\_) \_\_\_\_\_

### CONFERENCE REGISTRATION: Register online at [www.hbma.org](http://www.hbma.org)

HBMA Member ..... \$499 ..... \$ \_\_\_\_\_  
 Non-HBMA Member ..... \$599 ..... \$ \_\_\_\_\_  
**Total** \$ \_\_\_\_\_

### SESSION/EVENT SIGN-UPS

PLEASE ASSIST US IN PLANNING BY INDICATING ONLY THE SESSIONS & EVENTS YOU WILL ATTEND:

#### WEDNESDAY, NOVEMBER 16

- Newcomer's Session (8:00 am – 5:00 pm)     Reception with Exhibitors (5:00 – 6:30 pm)

#### THURSDAY, NOVEMBER 17

- |   |  |   |   |
|---|--|---|---|
| 10:30 am – 12:00 pm                                   | 1:00 pm – 3:00 pm                                    | 12:00 pm – 1:00 pm  | 5:30 pm – 7:00 pm   |
| <input type="checkbox"/> Vendor Selection             | <input type="checkbox"/> An Insider's Perspective    | <input type="checkbox"/> Networking Lunch (Please indicate Level) | <input type="checkbox"/> Networking Reception with Exhibitors |
| <input type="checkbox"/> Medical/Legal Considerations | <input type="checkbox"/> Training for Meaningful Use | ○ Level 1    ○ Level 2    ○ Level 3                               |   |
|   |  | ○ Level 4    ○ Level 5  |   |

#### FRIDAY, NOVEMBER 18

- |   |  |   |   |
|---|--|---|---|
| 8:00 am – 9:15 am   | 9:15 am – 10:30 am   | 10:45 am – 12:00 pm   | 12:00 pm – 1:00 pm                        |
| <input type="checkbox"/> A. Market Need for Help with EHR                   | <input type="checkbox"/> A. Workflow & Process Management                  | <input type="checkbox"/> A. EHR Implementation Planning                     | <input type="checkbox"/> Networking Lunch |
| <input type="checkbox"/> B. Vendor Evaluation                               | <input type="checkbox"/> B. Moderated Roundtable Discussions (Stage 1 & 2) | <input type="checkbox"/> B. Moderated Roundtable Discussions (Stage 3)      |   |
| <input type="checkbox"/> C. Demo Session                                    | <input type="checkbox"/> C. Demo Session                                   | <input type="checkbox"/> C. Demo Session                                    |   |
| 1:00 pm – 2:15 pm   | 2:30 pm – 3:45 pm  | 3:45 pm – 5:00 pm   |   |
| <input type="checkbox"/> A. EHR Implementation Support                      | <input type="checkbox"/> A. EHR Adoption & Ongoing Support                 | <input type="checkbox"/> A. EHR Optimization, Meaningful Use, Health Reform |   |
| <input type="checkbox"/> B. Moderated Roundtable Discussions (Stages 4 & 5) | <input type="checkbox"/> B. Roundtable Discussion                          | <input type="checkbox"/> B. Roundtable Discussion                           |   |
| <input type="checkbox"/> C. Demo Session                                    | <input type="checkbox"/> C. Demo Session                                   | <input type="checkbox"/> C. Demo Session                                    |   |

PLEASE CHECK THE PERTINENT INFORMATION BELOW:

- This is my first HBMA Conference     I am a new HBMA member     Special needs, including dietary \_\_\_\_\_

### PAYMENT INFORMATION

Make Check Payable to "HBMA" Check # \_\_\_\_\_ Amount Paid \$ \_\_\_\_\_  
 Visa     MasterCard     AMEX  
 Credit Card # \_\_\_\_\_ Exp. Date \_\_\_\_\_  
 Authorized Signature (required) \_\_\_\_\_ Date \_\_\_\_\_

**CANCELLATION POLICY:** Full refund, less a \$50 processing fee, will be granted only if a written cancellation is received by HBMA by Wednesday, October 19, 2011. No refund will be made for no-shows.

NOVEMBER 16-18, 2011



# EHR Summit

TALKING STICK RESORT · SCOTTSDALE, ARIZONA

## SUMMIT HIGHLIGHTS

### WEDNESDAY, NOVEMBER 16, 2011

- Newcomer's Session Day  
*Designed for those who have not yet stepped into the EHR arena*
- Opening Reception & Exhibits  
*Available to all summit participants*

### THURSDAY, NOVEMBER 17, 2011

- General & Concurrent Sessions  
*Six sessions that focus on "Becoming the EHR Administrator"*
- Networking Lunch  
*Discussions related to the 5 Levels of EHR Adoption*
- Reception & Breaks with Exhibitors

### FRIDAY, NOVEMBER 18, 2011

- Three options available during all Friday sessions
  - A. "EHR Implementation & Beyond" with Margret Amatayakul
  - B. Moderated Roundtables with Mark Anderson
  - C. Vendor Demonstration Sessions
- Vendor Demonstrations  
*Opportunities to view a variety of EHR systems throughout the day*

Participants in the EHR Summit may earn up to **7.5 hours each day** toward the designation of **CHBME** (Certified Healthcare Billing & Management Executive).

## SUMMIT FACULTY

**Margret Amatayakul, RHIA, CHPS, CPHIT, CPEHR, FHIMSS**  
*Margret A Consulting, LLC*

**Mark Anderson**  
*AC Group, Inc.*

**Reed Gelzer, MD, MPH, CHCC**  
*ADIC*

**David Jakielo, CHBME**  
*Seminars & Consulting*

**Ronald Sterling**  
*Sterling Solutions, Ltd.*



# 2011