



2013

**MARCH 5-8**

THE WESTIN SOUTH COAST PLAZA

COSTA MESA, CA

# Compliance

**CORE FACULTY:**

Holly J. Louie, RN, CHBME, PCS  
Karen L. Collier, Esq.  
Robert B. Burleigh, CHBME  
James B. Wieland, Esq.

**GUEST SPEAKERS:**

Paul W. Kim, Esq.  
Bill Finerfrock



**CONFERENCE**

**EFFECTIVE COMPLIANCE IS GOOD BUSINESS**

**Register Today ▶ [www.hbma.org](http://www.hbma.org) ▶ 1-877-640-4262**

# \* EFFECTIVE

## COMPLIANCE IS GOOD BUSINESS



The **HBMA 2013 Compliance Conference** offers two-and-a-half days of focused instruction presented by an expert faculty of compliance and billing industry professionals. Featuring new and revised sessions, this once-a-year program provides a practical approach to developing and assessing your Compliance Plan within the context of effective business practices. Learn how to **integrate compliance** into everything you do. Discover how to **add value** to your business services. Receive tips, techniques, strategies and resources to make compliance work for you.



### CONFERENCE MATERIALS INCLUDE

- Compliance Implementation Tools
- Sample Documents, Worksheets & Checklists
- Sample Contracts & Legal Documents
- Sample Policies & Procedures

FROM THE ATTENDEES

## What they are saying

"Many thanks to the faculty and staff for an excellent compliance course. Compliance often feels very overwhelming but it is so nice to come to this conference and be able to leave with the tools to help get a handle on it."

"Met my needs, very well organized. Current & time sensitive topics covered well. Well organized, information was valuable to me. Lots of useful information, very well done."

"This was an outstanding conference WOW! So much learned, I really respect the fact that the speakers will talk to you and help you with questions and good resources. I hope I can attend again!"

"This conference was great for all levels & now I have an even larger "to do" list. Thanks to the entire faculty! As always, HBMA conferences are professionally run and well organized."

"I have been hitting up the Compliance Machine since we got back from the meeting in San Diego; what a great conference! I am completely revamping our existing program from the ground up. I have been going through the definition phase of the project, establishing a method to perform an overall risk assessment for the company to ensure that we know what P&P we have vs. what we still need and how exactly we are going to enforce it. Gosh, what an adventure this is going to be. I would like to thank you for all of your direction and wealth of knowledge you relayed at the conference, and I look forward to seeing you at future events."

### CONFERENCE FACULTY

**Robert B. Burleigh, CHBME**  
Brandywine Healthcare Services  
West Chester, PA

**Karen L. Collier, Esquire**  
Oklahoma City, OK

**Holly J. Louie, RN, CHBME, PCS**  
Practice Management, Inc.  
Boise, ID

**James B. Wieland, Esquire**  
Legal Counsel for HBMA  
Ober, Kaler, Grimes & Shriver  
Baltimore, MD

### GUEST SPEAKERS

**Paul W. Kim, Esquire**  
Ober, Kaler, Grimes & Shriver  
Baltimore, MD

**Bill Finerfrock**  
HBMA Director of  
Government Affairs  
Capitol Associates  
Washington, DC

# \* SCHEDULE-AT-A-GLANCE



## \* TUESDAY, MARCH 5

- 1:00 – 1:15 pm . . . . . Welcome and Introductions
- 1:15 – 2:45 pm . . . . . **Compliance Officer and Committee** . . . . . Karen L. Collier, Esquire
- 2:45 – 3:00 pm . . . . . Break
- 3:00 – 4:30 pm . . . . . **Policies & Procedures Customized for Your Business** . . . . . Holly J. Louie, RN, CHBME, PCS
- 4:30 – 5:30 pm . . . . . **MACs! MICs! RACs! ZPICs! NSC! Oh, my!** . . . . . Guest Speaker: Paul W. Kim, Esquire
- 5:30 – 7:00 pm . . . . . Networking Reception

## \* WEDNESDAY, MARCH 6

- 7:30 – 8:30 am . . . . . Continental Breakfast
- 8:30 – 10:00 am . . . . . **Compliance Education & Training** . . . . . Robert B. Burleigh, CHBME
- 10:00 – 10:15 am . . . . . Break
- 10:15 – 11:45 am . . . . . **HIPAA /HITECH & Beyond** . . . . . Karen L. Collier, Esquire
- 11:45 am – 1:00 pm . . . . . Networking Lunch
- 1:00 – 2:30 pm . . . . . **Effective Monitoring and Auditing** . . . . . Holly J. Louie, RN, CHBME, PCS
- 2:30 – 2:45 pm . . . . . Break
- 2:45 – 4:00 pm . . . . . **Risk Assessments & the 'Oops' Factor** . . . . . Karen L. Collier, Esquire
- 4:00 – 4:15 pm . . . . . Break
- 4:15 – 5:45 pm . . . . . **Case Studies** . . . . . Faculty
- 5:45 – 7:00 pm . . . . . Networking Reception

## \* THURSDAY, MARCH 7

- 7:30 – 8:30 am . . . . . Continental Breakfast
- 8:30 – 10:00 am . . . . . **Washington Update** . . . . . Bill Finerfrock
- 10:00 – 10:15 am . . . . . Break
- 10:15 – 11:45 am . . . . . **Coding Compliance** . . . . . Holly J. Louie, RN, CHBME, PCS, Robert B. Burleigh, CHBME
- 11:45 am – 1:00 pm . . . . . Networking Lunch
- 1:00 – 2:30 pm . . . . . **Compliance and Your Billing Contract**  
 . . . . . Robert B. Burleigh, CHBME, James B. Wieland, Esquire
- 2:30 – 3:30 pm . . . . . **Stump the Faculty** . . . . . Panel Discussion/Faculty

## \* FRIDAY, MARCH 8

- 8:00 – 9:00 am . . . . . Continental Breakfast
- 9:00 am – Noon . . . . . **Post Conference Session: Hot Topics in Compliance!**  
 . . . . . Holly J. Louie, RN, CHBME, PCS,  
 Karen L. Collier, Esquire, Robert B. Burleigh, CHBME

*\*Additional registration and fee required.*

Participants in the HBMA 2013 Compliance Conference may earn up to 18 credits toward the designation of CHBME (Certified Healthcare Billing & Management Executive). The Post-Conference Session offers an additional 4.0 credit hours.

# \* SESSION DESCRIPTIONS

## TUESDAY \* MARCH 5

### COMPLIANCE OFFICER AND COMMITTEE

1:15 – 2:45 pm

Karen L. Collier, Esquire

**NEW!**

Having an effective Compliance Officer to shepherd your company's Compliance Program is one of the essentials to success. A good Compliance Officer is made, not born, but appointing someone who is a poor fit for the job can become more of a hindrance than a help. So how do you know whom to pick/hire? With a properly designed job description and a solid approach to your program structure, finding the right person for the job is achievable for everyone. Learn how to set up and focus your Compliance Committee to support the entire program, and to help get the work done and documented smoothly and efficiently. This session will address all aspects of building (or finding, or molding, or contracting) the perfect Compliance Officer and Committee for your billing company.

### POLICIES & PROCEDURES THAT ARE CUSTOMIZED TO YOUR OPERATIONS

3:00 – 4:15 pm

Holly J. Louie, RN, CHBME, PCS

**NEW!**

Policies and procedures are one of the most frustrating, time consuming and challenging requirements of effective compliance programs. Which ones are "must haves"? Which ones should you have? How do you write ones that work in your daily operations? Are there specific formats that work? What are the pitfalls? Whether you need to write them, update them, or revise them, this session will help you. Attendees will receive samples, examples, and real world billing company experiences in creating and maintaining policies and procedures that work.

### MACs! MICs! RACs! ZPICs! NSC! OH, MY!

4:30 – 5:30 pm

Guest Speaker: Paul W. Kim, Esquire

**NEW!**

Last year, Paul spilled the beans on his former employer CMS. This year, he will discuss the newest developments in the crazy world of Medicare and Medicaid post-payment audits, pre-payment reviews, enrollment reporting requirements, and appeals so that you can help your clients remain compliant through the audits and gain success through the appeals.

## WEDNESDAY \* MARCH 6

### COMPLIANCE EDUCATION AND TRAINING

8:30 – 10:00 am

Robert B. Burleigh, CHBME

**NEW!**

A critical element of an effective compliance program is training employees and contractors on the many facets of YOUR compliance program. This session will introduce some training ideas on both the company's compliance program itself (i.e., how the program operates, who is the compliance officer, etc.) and on the applicable laws and company policies that make up an effective compliance program.

### HIPAA / HITECH AND BEYOND

10:15 – 11:45 am

Karen L. Collier, Esquire

**REVISED**

For most of us, HIPAA and its regulations are scary, boring, or even mind-numbing, but we all know they are important. How do you get a handle on data security and information privacy in your shop? The good news is, you can reduce risks and manage your information with a well-thought-out, structured approach. The bad news is, you can never stop working at it. With all the news of data breaches, political pressure and law enforcement surrounding HIPAA, this has to be one of your top compliance priorities. Hear how to start and how to keep up in this changing environment from someone who actually enjoys talking about it.

### EFFECTIVE MONITORING AND AUDITING

1:00 – 2:30 pm

Holly J. Louie, RN, CHBME, PCS

**REVISED**

Is my monitoring and auditing effective? What's the difference between the two? Are there "musts"? What are the common errors and oversights? How do you choose your samples? What do they have to be? How big do they have to be? Am I doing it right? What are other billing companies doing? Is there a road map? Show me how! Get the answers to these questions and more. In this session we will take a look at other billing company methods to see what is working for them – and find out it might just work better for you! Attendees will take home real life examples, materials, resources, sample reports, links and tools to customize for YOUR company.

### RISK ASSESSMENTS AND THE 'Oops' FACTOR

2:45 – 4:00 pm

Karen L. Collier, Esquire

**NEW!**

How do you conduct an effective risk assessment? What do you do with what you learn as a result? What exactly IS a risk assessment, anyway? This completely revised session will take a look at how to structure risk assessment checklists and follow-up, how to best use your resources to respond to identified risks, and how to build a



culture of effective response when an "Oops" occurs. We will walk through sample risk checklists, and discuss how you can build your own to get your staff involved in detecting, correcting, and preventing compliance problems.

## CASE STUDIES

4:15 – 5:45 pm

Faculty

**NEW!**

With so much breaking news at your fingertips these days, there are already a plethora of case studies that have been discussed showing 'what went wrong and why.' The headlines shout messages that you can and need to learn from. Put yourself in the driver's seat to better understand what went wrong as we dissect a variety of issues that have seriously affected medical billing companies. Set aside this time now to learn what YOU need to be doing (or need to be avoiding!) to assure your company is not a future 'case study victim' as well!

## THURSDAY \* MARCH 7

### WASHINGTON UPDATE

8:30 – 10:00 am

Bill Finerfrock

In this always in-demand, popular, and informative session, Bill provides up-to-the-minute updates on pending legislation and regulations that affect the medical billing community. Discover what changes are coming that could impact your business. You won't want to miss this session and the opportunity to interact with one of your association's most valuable resources.

### CODING COMPLIANCE

10:15 – 11:45 am

Holly J. Louie, RN, CHBME, PCS and Robert B. Burleigh, CHBME

Coding is the number one risk factor for all billing companies. How do you know if it is accurate? What if you don't code; do you have risk? Where do you find resources? Where do you get the expertise? Does certification really matter? What about the 'MAC, RAC and more' attacks? What's new and how will it affect your company? What about ICD-10? Learn how to address coding risk in this practical session filled with tools, tips and ideas.

**REVISED**

### COMPLIANCE & YOUR BILLING CONTRACT

**REVISED**

1:00 – 2:30 pm

Robert B. Burleigh, CHBME and James B. Wieland, Esquire

Presented by the co-authors of an industry-standard medical billing agreement, this session will review where and how to embed customer and company compliance responsibilities in your billing agreement, how to navigate common areas of risk and negotiation difficulty, which risks are "deal breakers" and their warning signs. In addition, this 2013 edition will address recent enforcement actions and how your billing contract will, or might, affect liability. Following this session, you will return to your office equipped with knowledge of up-to-the-minute billing contract issues.

### STUMP THE FACULTY

2:30 – 3:30 pm

Faculty

You will not want to miss this fun, interactive, wrap-up session that will allow you to submit your questions (all hypothetical, please!) to the faculty for immediate feedback. Feel free to submit questions prior to the conference as well as throughout the conference. A prize will be awarded to the individual who comes up with the question that truly stumps this faculty!

## FRIDAY \* MARCH 8

### POST CONFERENCE SESSION

**HOT TOPICS IN COMPLIANCE!**

**NEW!**

9:00 am – Noon

Holly J. Louie, RN, CHBME, PCS, Karen L. Collier, Esquire, and Robert B. Burleigh, CHBME

This is a session designed for the ECP (Experienced Compliance Professional). It will be filled with dynamic, real-life scenarios from billing companies across the nation.

We created this popular event as an excellent opportunity for you to work in a small group setting with a great deal of interaction offered between the participants and speakers. Bring your questions, bring your real-life scenarios to share with others in this session as well as glean knowledge to take back to your business and put it to use immediately!

## SOCIAL & NETWORKING EVENTS

The Compliance Conference offers unlimited social and networking opportunities. Be sure to take advantage of all of these occasions to maximize your networking and learning through shared interaction with your colleagues.

### CONTINENTAL BREAKFASTS & BREAKS

- Daily

### NETWORKING LUNCHEONS

- Wednesday & Thursday, 11:45 am – 1:00 pm

### NETWORKING RECEPTIONS

- Tuesday, 5:30 – 7:00 pm
- Wednesday, 5:45 – 7:00 pm



# \* CONFERENCE ACCOMMODATIONS

## The Westin South Coast Plaza

686 Anton Blvd., Costa Mesa, CA 92626

[www.westinsouthcoastplaza.com](http://www.westinsouthcoastplaza.com)

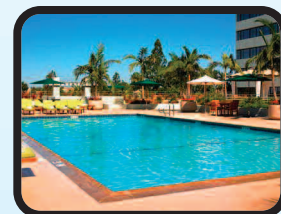
For reservations use the link on the HBMA website or call: 714 540-2500

The Westin South Coast Plaza enjoys a prime location within proximity to the cultural variety, exciting attractions, and natural splendor of Orange County. Within minutes of the Orange County Airport, this is your destination to all the OC has to offer. Our Costa Mesa hotel is only a short walk to the heart of the Orange County theatre district and South Coast Plaza, with over 280 of the world's great retail stores. The kids will delight in nearby Disneyland Resort®, Knott's Berry Farm and the Aquarium of the Pacific.

A stay at the Westin South Coast Plaza, Costa Mesa allows you to discover the culture, glamour and excitement of Orange County. The Orange County hotel offers a host of instinctive, personal sensory experiences including music, lighting, even aromatic and botanicals – all intended to soothe and stimulate.

**Special rates for attendees: \$199 + tax per night.**

**Cut-off date for reservations at this guaranteed room rate: TUESDAY, FEBRUARY 12, 2013**



FROM THE ATTENDEES

### What they are saying

"Thank you for the fresh new look on this 'same-old' material! I've heard it before, but this time I feel like I really understood what I need to do. Thank you for helping me to sort out what I need to do to stay compliant!"

"I really like the real world examples all of the speakers were willing to share. They all related well with audience and appreciate the honesty and willingness to share their real journeys."

"Thank you for breaking down a very complicated topic in a way that makes sense and for providing practical tips to apply."

"Nice concise information, organized well, easy to follow. Will be able to take back and use as a basis to develop our policy."

"Great teamwork among all of the speakers in getting the message across!"

"Fantastic knowledge shared from all of the speakers. Really put the "Business" drive behind it to keep it all in perspective."

"Great job! As always a very well run conference both in the information presented and in the physical set up & location. Great having all of the downloaded material."



# \* CONFERENCE REGISTRATION



MARCH 5-8, 2013 • THE WESTIN SOUTH COAST PLAZA • COSTA MESA, CALIFORNIA

Register online at [www.hbma.org](http://www.hbma.org) or return this form and payment to HBMA via fax or mail.

Please submit a separate Registration Form for each attendee.

Member Organization \_\_\_\_\_ Member #: \_\_\_\_\_ ☐ CHBME

Name: \_\_\_\_\_  
First Name Last Name

Company Name: \_\_\_\_\_ Title: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State/Province: \_\_\_\_\_ Zip: \_\_\_\_\_

Country: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

Email: \_\_\_\_\_ Website: \_\_\_\_\_

In case of emergency, please contact: \_\_\_\_\_

Emergency contact phone #: \_\_\_\_\_

## REGISTRATION FEE: Includes conference materials, reception, continental breakfasts, breaks & lunches

HBMA and RBMA Member Registration . . . . .	\$1295.00
HFMA and MGMA Member Registration . . . . .	\$1495.00
Non-Member Registration . . . . .	\$1595.00
POST CONFERENCE: Compliance Course Participants . . . . .	\$99.00
POST CONFERENCE: For Those Attending Post-conference Only . . . . .	\$399.00
Total . . . . .	\$_____

## PLEASE COMPLETE THE FOLLOWING:

Your Job Title \_\_\_\_\_ # of Full-time Employees \_\_\_\_\_

Primary Specialty \_\_\_\_\_

Status of Your Compliance Program:

☐ Not yet started ☐ Beginning Stages ☐ Intermediate Stages ☐ Fully Implemented

☐ Previous HBMA Compliance Conferences Attended: ☐ 0 ☐ 1 ☐ 2-3 ☐ 4+ Year of last program \_\_\_\_\_

☐ Your Expectations for the Conference (Attach separate sheet or email to [paul@hbma.org](mailto:paul@hbma.org))

☐ Functions You Will Attend: ☐ Tues. Networking Reception ☐ Wed. Lunch ☐ Wed. Reception ☐ Thurs. Lunch

☐ Indicate any special needs, including dietary \_\_\_\_\_

☐ Please check here if this is your first HBMA Conference

## PAYMENT INFORMATION: Full payment must be included with your registration form.

Registration Fee Total \$ \_\_\_\_\_ ☐ Check # \_\_\_\_\_ ☐ Visa ☐ MasterCard ☐ AMEX

Credit Card Number \_\_\_\_\_ Exp. Date \_\_\_\_\_

In the name of \_\_\_\_\_ Signature \_\_\_\_\_

**Cancellation Policy:** Full refund, less a \$100 processing fee, will be granted only if a written cancellation is received by HBMA by **Tuesday, February 5, 2013**. No refund will be made for no-shows.



1540 S. Coast Hwy, Suite 203  
Laguna Beach, CA 92651



## QUESTIONS AND TOPICS THAT WILL BE ADDRESSED:

- Why should I invest in a compliance program?
- Where and how do I get tools to make my plan effective for my company?
- How can I develop a compliance plan that works?
- What do we need to know about compliance as it relates to our coding?

Receive practical, operational knowledge, and tools that will enhance your operations and customer service through the development and implementation of effective compliance processes.

**REGISTER TODAY!**

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