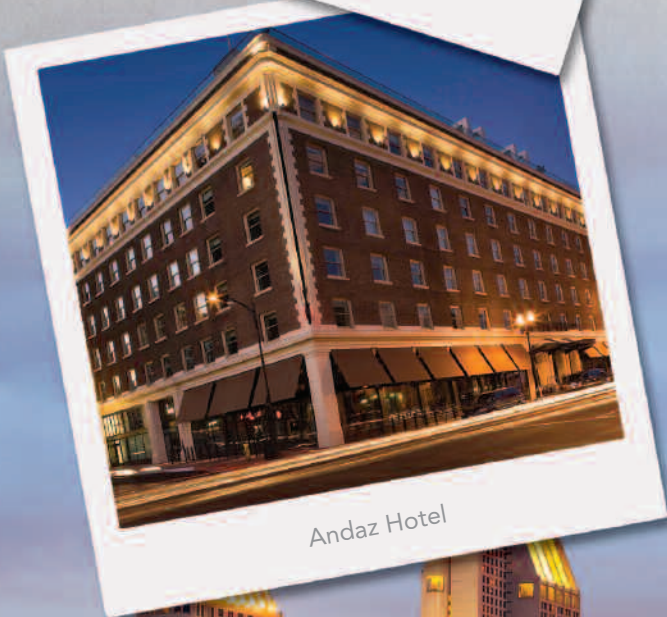




HBMA OWNER'S & MANAGER'S CONFERENCE 2014



San Diego, California



Andaz Hotel

Make your plans now to join us for the first Owner's & Manager's Conference of 2014 at the Andaz Hotel in the historic Gaslamp District of beautiful San Diego, CA. Experience 16 timely sessions designed specifically to help with your continued success in the billing industry.

We have invited several special guests to join **Robert Burleigh** and **David Jakielo** as the guest faculty for this not-to-be-missed event. **Ted Stack** has more than 25 years of healthcare service, technology, financial, operational, and entrepreneurial experience and is currently managing director of Falcon Capital Partners, LLC. **Dan Rode, MBA, CHPS, FHFMA**, is president of Dan Rode & Associates, a consulting firm based in metro-Washington, DC. He specializes in various aspects of HIPAA and HITECH regulations and compliance.

FEBRUARY 6-8, 2014

ANDAZ HOTEL

SAN DIEGO, CALIFORNIA

**REGISTER EARLY!
SPACE IS LIMITED!**

Registration open to HBMA members only

Registration Fee: \$1295.00

REGISTER TODAY AT

www.hbma.org/omw14



OWNER'S & MANAGER'S CONFERENCE 2014



CONFERENCE SCHEDULE



THURSDAY, FEBRUARY 6

- 7:00 - 8:00 am Continental Breakfast
- 8:00 - 9:30 am **Introduction/Opening**
- 9:30 - 10:00 am Break
- 10:00 - 11:00 am **Healthcare Industry Trends**
- 11:00 am - 12:00 pm **21st Century Operating Models**
- 12:00 - 1:30 pm Working Lunch and Workgroup Presentations
- 1:30 - 3:00 pm **Affordable Care Act**
- 3:00 - 3:30 pm Break
- 3:30 - 5:00 pm **Big Data**
- 5:30 - 7:00 pm Opening Reception (Guests Welcome)

FRIDAY, FEBRUARY 7

- 7:00 - 8:00 am Continental Breakfast
- 8:00 - 10:00 am **Anatomy of an M&A Transaction**
- 10:00 - 10:30 am Break
- 10:30 - 11:30 am **Building Bench Strength**
- 11:30 am - 12:00 pm **HBMA Programs and Services**
- 12:00 - 1:30 pm Working Lunch and Work Group Presentations
- 1:30 - 2:30 pm **How to Improve Your Profits**
- 2:30 - 2:45 pm Break
- 2:45 - 4:15 pm **ICD-10**
- 4:15 - 5:15 pm **Key Performance Indicators**
- 5:15 - 6:15 pm **mHealth**
- 6:30 - 7:30 pm Networking Reception

SATURDAY, FEBRUARY 8

- 7:00 - 8:00 am Continental Breakfast
- 8:00 - 9:00 am **Selling to Hospitals and Health Systems**
- 9:00 - 10:30 am **Strategic Planning**
- 10:30 - 10:45 am Break
- 10:45 - 11:45 am **What Does the M Stand for in HBMA?**
- 11:45 am - 12:45 pm **Zero Touch – The Future of Billing**

Don't miss your opportunity to participate in the first Owner's & Manager's Conference of 2014!
Seating is limited to 55 HBMA Members for each meeting.

SPACE IS LIMITED! REGISTER TODAY!

For online registration, go to www.hbma.org/omw14



Nineteen Years of Building Your Company's Future

THURSDAY SESSIONS

INDUSTRY UPDATE AND INTRODUCTIONS

Faculty and Attendees

UPDATED

The conference opens with a review of what's happening nationally relating to legislation, regulation, information systems, technology innovations, and hospitals and their effects on the billing industry.

HEALTHCARE INDUSTRY TRENDS

Robert Burleigh and Dave Jakielo

UPDATED

Explore the latest and most important trends in the medical billing industry that may have a positive or negative effect on your company. Insights will be shared as to how you can adapt and capitalize on the various trends.

21st CENTURY OPERATING MODELS

Dave Jakielo

NEW!

Today's ever-evolving medical billing arena means that we need to redefine our traditional concepts of how we organize our operations and deliver our services. Change is inevitable due to new technologies, outsourcing, and potential new client bases. We will explain how and why you may need to adjust your current operating model to survive and prosper in the next five years.

AFFORDABLE CARE ACT

Robert Burleigh

UPDATED

How is the Affordable Care Act affecting you, your clients and your business? Now that ACA is in effect, we will review the latest issues and challenges and possible solutions, as well as how to help your clients establish a sound strategy that will optimize their results under ACA.



HBMA has re-designed the certification program to encourage excellence through education and awareness of the billing industry. Attaining this distinction requires attendance and participation in HBMA sponsored programs.

Participants in the 2014 O&M Conference may earn up to **18.5 CEUs** toward the designation of CHBME (Certified Healthcare Billing and Management Executive).

Elevate your professional stature and gain a competitive edge by pursuing certification as a CHBME!

BIG DATA

Robert Burleigh

NEW!

In the rapidly fading past, understanding results and performing analysis was based on sampling, hypotheses, assumptions, and guesses. No more. Not only does modern computing offer the opportunity to analyze *all* of the data, the data will often tell you things about what's happening that are true, revealing and, often startling. We will review and discuss how Big Data can provide you with new ways to assess your own operation, as well as how to assist your clients in new and powerful ways.

FRIDAY SESSIONS

ANATOMY OF AN M&A TRANSACTION

Ted Stack

NEW!

Billing companies have been bought and sold for more than thirty years. As with all industries, there is a "script" to how these transactions are conducted, regardless of the size and scale of the seller and the buyer. Industry expert Ted Stack will review how deals are structured, why certain factors contribute to successful transactions, and why this information is important to all owners and managers – even those who may never sell or buy.

BUILDING BENCH STRENGTH

Dave Jakielo

NEW!

To remain viable in today's marketplace, it is inevitable that medical billing companies must continue to grow. That growth can be painful if you do not have enough competent team members that can facilitate your expansion and grow along with you. You will learn how to recruit, retain, and develop current employees to ensure you continue to deliver quality service to your current and future clients.

HBMA PROGRAMS AND SERVICES

HBMA Board Member

NEW!

HBMA offers a host of programs and services for members, many of which are little-used or not well understood. This session will provide a checklist and quick review of some of the valuable benefits available to members – whether you're new or have been an HBMA member for over a decade.

HOW TO IMPROVE YOUR PROFITS

Dave Jakielo

NEW!

This session will provide you with specific and detailed policies and procedures that will allow you to increase your company's bottom line or free up capital for additional re-investment back into your firm.

EDUCATE. ADVOCATE. COLLABORATE.



SAN DIEGO, CALIFORNIA | FEBRUARY 6-8, 2014

FRIDAY SESSIONS (continued)

ICD-10

Dan Rode



As 2014 begins, ICD-10 is only nine months from taking effect. Our guest speaker has served as vice president of government relations for AHIMA and HFMA and will discuss strategies, business approaches, current issues, and expected developments as ICD-10 is implemented. His decades of industry policy work allows Dan to offer multi-dimensional advice and recommendations as providers and billing companies approach the October 1, 2014 implementation date.

KEY PERFORMANCE INDICATORS

Robert Burleigh



Operating a growing, profitable billing company has never been more challenging. The number and variety of day-to-day activities to manage can distract managers from noticing critical changes in their operations. This session will provide new and established measurements and key performance indicators and their formulae that allow managers to effectively navigate and manage their companies.

mHEALTH

Robert Burleigh



One of the newest frontiers in medicine is mHealth – mobile health. Electronic visits; internet-enabled, remote face-to-face visits; innovative uses of technology, including smart phones, tablets and “smart” devices; and a host of emerging ways of delivering medical services pose a new problem: how to bill and get paid for these services. We will provide a recap of the latest developments and current payment (and non-payment) policies as we move forward into a future where mHealth will be commonplace.

SATURDAY SESSIONS

SELLING TO HOSPITALS AND HEALTH SYSTEMS

Robert Burleigh and Dave Jakielo



Billing companies’ traditional client base has been redefined as hospitals and health systems are, again, acquiring medical practices or simply employing physicians. It is imperative that we learn the skills necessary to inform and convince these new buyers of the benefits and savings offered by using a third party medical billing service. Learning how to “speak hospital,” understanding their habits and (de)motivations, knowing how to present the best solution in terms they understand, learning how CFOs approach outsourcing, identifying and getting to the real decision-makers, and many other insights will be covered. The discussion will include a roadmap for networking and prospecting in this new arena.

STRATEGIC PLANNING

Robert Burleigh and Dave Jakielo



Using a “Flavor of the Month” approach to run your company is ineffective and inefficient. This session provides a logical framework for analyzing our industry, your company’s position in it, and how to set goals to achieve the strategic objectives that you develop. Distinguishing between goals, tactics, and strategies – and the importance of each – will be covered. More than ever before, having a well-defined strategy for your business will be vital to future success.

WHAT DOES THE “M” STAND FOR IN HBMA?

Dave Jakielo



Over the past decades many medical billing companies have emphasized the “B” in HBMA billing. However, with today’s sophisticated clients, it is just as important to emphasize the “M” management. We will look at how you can offer additional services that make you more valuable to you clients as well as how to turn the data that resides in your system into pertinent information that will assist your clients in improving their practices.

ZERO TOUCH – THE FUTURE OF BILLING

Robert Burleigh



The #1 cost in operating a medical billing company is labor. Whether onshore or offshore, the costs of “touching” accounts is more than half of your budget. Rather than being the hallmark of a client-dedicated company, “high touch” is often a euphemism for inefficiency and low productivity. The most advanced and profitable companies are, more and more, devising ways to increase productivity and reduce employee costs through the elimination of account “touch,” without compromising customer (patient) and client service.



**SPACE IS LIMITED!
REGISTER TODAY!**
www.hbma.org/omw14



OWNER'S & MANAGER'S CONFERENCE 2014



If you are a medical billing company owner or manager, you do not want to miss this year's O&M Conference. We've taken your feedback and developed an outstanding program filled with forward-thinking educational sessions, plenty of networking opportunities, the ability to catch up with colleagues, and more than a little fun!

WHAT THEY ARE SAYING...

- "I had extremely high expectations for this conference. They were not only met – you exceeded them."
- "Presentations were relevant, full of valuable information, and thorough. Thank you for a great conference and for sharing with us how to build a solid company."
- "Thank you for all the material and information. This conference always gives me ideas and motivation to improve our company."
- "It is hard to add to something that was planned, organized, and presented so professionally. Nice job and thank you."
- "Love the informal approach and small size!"
- "First experience. Great!"
- "The conference was organized and scheduled at an appropriate pace. Right number of attendees for good networking. Good content. Interactive. All around good meeting and well done. Thanks."
- "Content on point to what we were looking for – organized, detailed, on time, professional."
- "This conference exceeded my expectations. A very well-run, well-planned, very thoughtful conference. A total class act!"

DON'T MISS OUT!

RESERVE YOUR PLACE AND MAKE YOUR HOTEL RESERVATIONS EARLY!

SOCIAL AND NETWORKING EVENTS

The Owner's & Manager's Conferences are designed to afford numerous opportunities for you to connect with your peers. Participation is deliberately limited to 55 attendees to facilitate interactivity throughout the meeting. Be sure to take advantage of all of these occasions to maximize your networking and learning through shared interactions with your colleagues:

CONTINENTAL BREAKFASTS & BREAKS

- Daily 7:00 – 8:00 am

WORKING LUNCHEONS

- Thursday 12:30 – 2:00 pm
- Friday 12:00 – 1:30 pm

RECEPTIONS

- Thursday 5:30 – 7:00 pm (*Guests Welcome*)
- Friday 6:30 – 7:30 pm

SIX TIPS FOR NETWORKING:

- 1 Don't spend all your time with people you already know.
- 2 Scan the list of attendees and decide who you want to meet and why. If you're not sure, think about it from a general perspective – perhaps it's someone with a certain type of experience or from a specific company.
- 3 Don't leave it to chance; make the connection.
- 4 Introduce yourself every time you sit down. Keep business cards handy and give them out generously.
- 5 Be a good contact and do what you promise.
- 6 Make a note as a follow-up plan and include a brief description of: who they are, how you met, your follow-up plan or action.



HBMA will continue its "going green" efforts for the O&M Conferences. Session materials will be made available to you on the HBMA website prior to the program for which you have registered. Additionally, all course materials will be provided to you on a flash drive once you arrive on-site. Our meeting room will be set up to accommodate your laptop computers.



OWNER'S & MANAGER'S CONFERENCE 2014

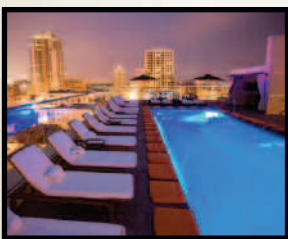
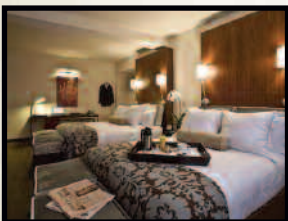
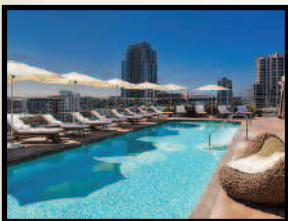
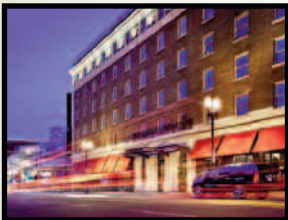
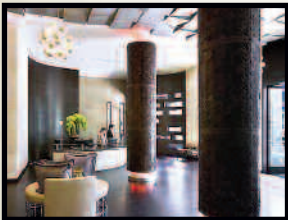


■ FEBRUARY 6-8, 2014

ANDAZ HOTEL

600 F Street, San Diego, California, 92101 • Tel: 619-849-1234

Room rate: \$209 + tax • Cut-off date: Monday, Jan. 13, 2014



America's Finest City has been revamped with a whole new vibe. Join us at the sophisticated Andaz San Diego, a boldly progressive addition to the city's historic Gaslamp Quarter. With its sleek style and fresh attitude, this chic new destination flies in the face of typical downtown San Diego hotels.

Have a seat in the Andaz Lounge – part lobby, part living room – where your Andaz Host will perk up check-in with a free glass of wine or bottle of water. No uniforms, no counters, no stuffy procedures – just a friendly conversation welcoming you to our Gaslamp Quarter hotel. The Lounge will help shape the rest of your stay as a place to get coffee, check your email, or sip a few cocktails before heading out to paint the town red.

When it comes to pillow talk, our 159 ultra-modern guestrooms and suites are studies of style and sensuality. Each room is dressed in rich textures, warm woods, and daring architectural elements, creating high design sanctuaries of cosmopolitan comfort. Luxuriate in the fashionable indulgence of platform beds, glass-enclosed bathrooms, and flat screen TVs, details which make Andaz San Diego the most alluring of San Diego Gaslamp District hotels.

Business travelers are advised to loosen their ties – meetings and events are anything but buttoned up at our new San Diego hotel near the Convention Center. Corporate monotony is replaced with innovative catering and singularly stunning venues, including our supremely swank rooftop pool and lounge. Need an afterhours break from the boardroom? Hit up our iconic four-story Ivy Nightclub, or step out and experience the city's legendary, high-octane nightlife.

Reinvent the way you travel. Redefine your view of cool. Experience this San Diego Gaslamp Quarter hotel, fusing the spirit of the historic Ivy Hotel with the modern soul of the Andaz brand.

Hotel Reservations: The Andaz Hotel is offering special group rates to HBMA guests of \$209 plus tax. Guestroom internet is included in this special rate. HBMA has reserved a limited number of rooms and strongly recommends that you make your reservations early and well before the room release date of Monday, January 13, 2014. **To make reservations call 619-849-1234.**



SAN DIEGO, CALIFORNIA | FEBRUARY 6-8, 2014

CONFERENCE REGISTRATION

Register online at www.hbma.org/omw14 or return this form with your payment to HBMA via fax or mail.

Please submit a separate registration form for EACH attendee.

Member Organization _____ Member #: _____ CHBME: Yes No

Name: _____
First Name Last Name

Title: _____

Company Name: _____

Address: _____

City: _____ State/Province: _____ Zip: _____

Country: _____

Phone: _____ Fax: _____

Email: _____ Website: _____

In case of emergency, please contact: _____ Emergency contact phone #: _____

REGISTRATION ←

Register and make your hotel reservations early! Space is limited to 55 participants.

February 6-8 • San Diego, CA

Please complete the following:

- I will attend the: Thursday Working Lunch Friday Working Lunch
 Thursday Opening Reception Friday Networking Reception

I understand that full refund of the registration fee, less a \$150 administrative fee, will be granted only upon a written request received by HBMA on or before Monday, January 6, 2014.

I have special needs, including dietary. Please contact me.

I am a new HBMA member

This is my first HBMA conference



REGISTRATION FEE AND PAYMENT INFORMATION ←

This conference is open to HBMA members only. **Registration Fee: \$1295.00**

Full payment MUST accompany your registration. You may mail this completed form with your check to HBMA. The fee includes conference materials, breakfast and refreshments breaks, lunches, and receptions. To pay with credit card, please register online at www.hbma.org/omw14.

Registration Fee Total \$1295.00 Check # _____

O&M

SAN DIEGO, CALIFORNIA | FEBRUARY 6-8, 2014

OUR PRESENTERS

■ **Robert Burleigh, CHBME**, is president of Brandywine Healthcare Services. He is a past president of HBMA and currently serves on the Government Relations and Ethics/Compliance committees. A recognized authority within the industry, Bob has conducted hundreds of seminars for healthcare professionals nationwide.



■ **David Jakielo, CHBME**, President of Seminars & Consulting, has more than 30 years of healthcare industry experience. He is a certified trainer, frequent lecturer, author, and regular columnist in *Billing*. Dave is a past president of HBMA and currently serves on the Education Committee.



■ **Ted Stack** has more than 25 years of healthcare service, technology, financial, operational, and entrepreneurial experience and is currently managing director of Falcon Capital Partners, LLC in Radnor, PA. He has been involved with more than 150 transactions throughout his career. He previously served as founder and managing director of healthcare technology Ventures and M&A firm InHealth Venture Management. Ted has been on numerous private company boards. He is a graduate of James Madison University with a BBA degree in accounting and finance.

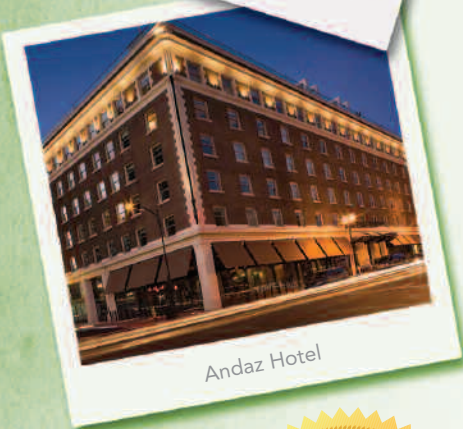


■ **Dan Rode, MBA, CHPS, FHFMA**, is president of Dan Rode & Associates, a consulting firm based in metro-Washington, DC. He specializes in various aspects of HIPAA and HITECH regulations and compliance, including transactions, classification, and terminology; privacy and security; health information management and operations; ICD-10 implementation; revenue cycle operations; and federal and state health care policy. Dan has provided leadership to a number of industry efforts including the development of the Administrative Simplification Standards, the National Uniform Billing Committee, the national billing audit guidelines, the implementation of ICD-10-CM/PCS, and the transaction operating rules.



RESERVE YOUR PLACE & MAKE YOUR HOTEL RESERVATIONS EARLY!

■ **FEBRUARY 6-8, 2014 | SAN DIEGO, CALIFORNIA**



SEATING IS LIMITED! REGISTER TODAY!

Registration open to HBMA members only. Register online at www.hbma.org/omw14