**11th Annual Workshop for Transplant Financial Coordinators**

September 30th to October 2nd, 2015

*St. Louis Union Station – a DoubleTree by Hilton Hotel*

*St. Louis, Missouri*

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TFCs: Ensuring we provide accurate financial information to our patients and their families in a compassionate and tactful manner, while maximizing reimbursement for our transplant centers.

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**DRAFT AGENDA**

- SUBJECT TO CHANGE -

**Day 1: Wednesday, September 30**

<table>
<thead>
<tr>
<th>Time</th>
<th>Session</th>
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<tbody>
<tr>
<td>7:15 am-4:45 pm</td>
<td>REGISTRATION OPEN</td>
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<tr>
<td>7:15 am-4:45 pm</td>
<td>EXHIBIT AREA OPEN</td>
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<tr>
<td>5:30 pm-6:30 pm</td>
<td>BREAK</td>
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<tr>
<td>7:15 am-8:00 am</td>
<td>BREAK</td>
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**GENERAL SESSIONS**

~~ please sit with your transplant specialty - signs on tables~~

<table>
<thead>
<tr>
<th>Time</th>
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<tbody>
<tr>
<td>8:00 am-8:30 am</td>
<td>WELCOME</td>
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<td></td>
<td>Debbie Mast, TFCA President, Database Administrator/Financial Manager, Solid Organ Transplant/MCS Program, Stanford Health Care, Palo Alto, CA</td>
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<tr>
<td>8:30 am-9:30 am</td>
<td>KEYNOTE: A Survivor’s Experience</td>
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<td>Bill Coon, Author, Speaker, Patient Advocate, Infant Heart Transplant Recipient, Adult Heart/ Kidney Transplant Recipient, Chicago, IL</td>
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<tr>
<td>9:30 am-9:45 am</td>
<td>BREAK with EXHIBITORS</td>
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<td>9:45 am-10:45 am</td>
<td>Centers of Excellence: The Good, The Bad, The Ugl….The Excellent</td>
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<td>Jennifer Milton, BSN, CCTC, MBA, Executive Director, Clinical Assistant Professor, University of Texas Transplant Center, San Antonio, TX</td>
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<td>10:45 am-11:00 am</td>
<td>SPONSOR Presentation</td>
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<tr>
<td>11:00 am-12:00 pm</td>
<td>Connect and Learn!</td>
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<td>♦ BMT ♦ Heart ♦ Kidney ♦ Liver ♦ Lung/Thoracic ♦ Multi-visceral ♦ Pediatric ♦ KPD</td>
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<td>o Communicating and collaborating</td>
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<td>o Learning together</td>
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<td>o Round table session</td>
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<td>Moderators:</td>
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<td>Lisa McDermott, Transplant Operations Analyst, Methodist University Hospital, Memphis, TN</td>
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<td>Lisa Donovan, Transplant Financial Coordinator, SUNY Upstate University Hospital, Syracuse, NY</td>
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</table>
12:00 pm-1:00 pm  
**LUNCH – table signs to sit with your transplant specialty**

**GENERAL SESSION**

1:00 pm-2:00 pm  
Facing the lifelong financial realities of a transplant - where can we reach out for help?

*Rick Lofgren, CFRE, President & CEO, Children’s Organ Transplant Association-COTA  
David Bakelman, CEO, HelpHOPELive  
Connie Gonitzke, President & CEO, National Foundation for Transplants-NFT*

2:00 pm-2:15 pm  
**SPONSOR Presentation**

~~ 2:15 pm-2:30pm: transition to breakouts ~~

**CONCURRENT BREAKOUT SESSIONS I**

2:30 pm-3:30pm  
2 topics - choose one to attend

- **Cost Report – solid organ**  
  Medicare Cost Report Basics – Information for the TFC  
  *Robert Howey, CPA, Revenue Cycle Manager, Mayo Clinic, Jacksonville, FL*

- **Cost Report – BMT**  
  Medicare Cost Report As It Relates to Stem Cell Transplant  
  *Angela Simmons, Vice President, Revenue and Reimbursement, Vanderbilt University Medical Center*

3:30 pm–3:45 pm  
**BREAK with EXHIBITORS**

**CONCURRENT BREAKOUT SESSIONS II**

3:45 pm-4:45 pm  
3 topics - choose one to attend

- **TFC 101**  
  TFC 101: Understanding the Essential functions for the TFC  
  And - oh yes - “other responsibilities as required”  
  *Tracy Giacom, RN, MSN, MBA, FACHE, Vice President Transplant Services, Methodist Dallas Medical Center, Dallas, TX*

- **BMT – Patient Benefit Review**  
  Components of a Patient Benefit Review and Acceptable Patient Liability  
  *Gary Goldstein, Business Manager, Blood and Marrow Transplant Program, Stanford Health Care, Stanford CA*

- **Advanced Topics in Organ Acquisition Reporting**  
  Advanced Topics in Organ Acquisition Cost Reporting  
  *Robert Howey, CPA, Revenue Cycle Manager, Mayo Clinic, Jacksonville, FL*

~~ **TFCA Welcome** ~~

**Reception**

5:30 pm to 6:30 pm  
with Exhibitors
**Day 2: Thursday, October 1st**

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<td>7:15 am-5:00 pm</td>
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<td><strong>EXHIBIT AREA OPEN</strong></td>
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| 7:15 am-9:00 am** | **BREAKFAST**  
**Note** TFCA Business Meeting starts at 8:00 a.m. for all TFCA Members |
| 8:00 am-9:30 am | 15th Annual TFCA (Transplant Financial Coordinators Association)  
**Business Meeting**  
[Session Attendance Limited to TFCA MEMBERS]** |
|               | The TFCA Business Meeting is for active TFCA members only. In this meeting the TFCA governing body is charged with disseminating association business information. Officer Reports, Financial Reporting along with Election Committee, Credentialing Committee, Planning Committee and Fundraising Committee Updates. Following committee updates, will be open discussion for members to ask questions and seek clarification on subjects and topics pertinent to our organization. |
| 9:30 am-9:45 am | **BREAK with EXHIBITORS**                                               |

**CONCURRENT BREAKOUT SESSIONS III**

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<tr>
<td>9:45 am-10:45 am</td>
<td><strong>3 topics – choose one to attend</strong></td>
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| Donor Billing: Solid Organ | Financial Facets of Living Donation  
Tracy Giacoma, RN, MSN, MBA, FACHE, Vice President Transplant Services, Methodist Dallas Medical Center, Dallas, TX |
| Donor Billing: BMT | The Impact of Your Donor Billing, Coding, and Charging Practices on Medicare Rate Setting  
Jugna Shah, MPH, President & Founder, Nimitt Consulting, Washington, DC |
| Heart/Lung | Heart & Lung Transplant: What Patients Face in Financial Costs  
Rebecca Bathon, MSW, LCSW, Clinical Social Worker, Lung Transplant;  
Nina Jarvis, MSW, LCSW, Clinical Social Worker, Heart Transplant/LVAD,  
Barnes-Jewish Hospital, St. Louis, MO  
Mike Moratz, Associate Director, Market Access, Health Policy and Health Outcomes, HeartWare, Inc., Framingham, MA / VADs Coverage & Reimbursement |

~~ 10:45 am –11:00 am: transition to breakouts~~

**CONCURRENT BREAKOUT SESSIONS IV**

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<td>11:00 am-12:00 pm</td>
<td><strong>2 topics – choose one to attend</strong></td>
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| Insurance Verifications/Precerts/Appeals | Insurance Verification/Precerts/Appeals: **Lessons Learned for Heart, Liver, and Lung Transplants**  
Debbie Mast, Database Administrator/Financial Manager, Solid Organ Transplant/MCS Program, Stanford Health Care, Palo Alto, CA |
| ICD – Rx for Success | **ICD 10 – A RX for Success**  
Carolyn Rubin, Senior Director Revenue Cycle Innovations, Anthelio Healthcare Solutions, Fort Worth, TX |
| 12:00 pm - 1:00 pm | **LUNCH**                                                             |
GENERAL SESSION
1:00 pm-1:15 pm  SPONSOR PRESENTATION
1:30 pm–2:30 pm  UNOS Initiatives & Strategic Plan
UNOS Initiatives
Betsy J. Walsh, J.D., M.P.H., UNOS President-Elect, Vice President and Deputy General Counsel, Novant Health Inc., Charlotte, N.C.
2:15 pm-2:30 pm  SPONSOR PRESENTATION
2:30 pm-2:45 pm  BREAK with EXHIBITORS

CONCURRENT BREAKOUT SESSIONS V
2:45 pm-3:45 pm  3 topics – choose one to attend –
Triaging High Risk Patients
Triaging the High Risk Patient: The TFC/Nurse Partnership in a Liver Transplant Program
Shanda Ross, RN, MSN, Manager, Nebraska Medical Center, Omaha, NE
Medicare Basics
Medicare 101
Ruth Wilhelm, Transplant Financial Manager, The Virginia Transplant Center, Henrico Doctors’ Hospital, Henrico, VA
Lisa McDermott, Transplant Operations Analyst, Methodist University Hospital, Memphis, TN
Pharmacy
Pharmacy: Patient Assistance Programs & Medicare B-vs-D
Judy Maltz, CPC, President -Transplant Reimbursement Analytics, LLC, Phoenix, AZ
~ 3:45 pm-4:00 pm: transition to breakouts ~

CONCURRENT BREAKOUT SESSIONS VI
4:00 pm–5:00 pm  3 topics – choose one to attend
Pediatrics
Connecting the Consultants: The Link Between Social Workers and Financial Coordinators
Cassie Stewart, LMSW Nephrology Division & Liver Transplant, Children’s Hospital of MI, Detroit, MI
Evaluation or Treatment?
Evaluation or Treatment?
Key Determination for the Medicare Cost Report & Insurance Billing
Laura J. Aguiar, Principal & Managing Partner, Transplant Solutions, LLC, Glendale, AZ
William P. Vaughan, Principal, Transplant Solutions, LLC, Houston, TX
Pharmacy
(repeat of 2:45 session)
Pharmacy: Patient Assistance Programs & Medicare B-vs-D
Judy Maltz, CPC, President -Transplant Reimbursement Analytics, LLC, Phoenix, AZ
Day 3: Friday, October 2nd

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| 8:30 am-9:30 am | General Session: Government Sponsored Health Insurance: Medicare, Medicaid, and CHIP  
- Program essentials  
- Comprehensive question & answer session  
_Nancy Rios, Centers for Medicare & Medicaid Services (CMS), Regional External Affairs, Kansas City, MO_ |
| 9:30 am-10:00 am | Extended Q&A with CMS staff                                       |
| 10:00 am-10:30 am | BREAK                                                              |
| 10:30 am-12 pm   | General Session: Private Health Insurance Marketplace: Health Insurance Marketplace  
- An Interactive Overview  
_Nancy Rios, Centers for Medicare & Medicaid Services (CMS), Regional External Affairs, Kansas City, MO_ |
| 12:00 pm-12:30 pm | Wrap-Up & Evaluations                                               |

_Debbie Mast, TFCA President, Database Administrator/Financial Manager, Solid Organ Transplant/MCS Program, Stanford Health Care, Palo Alto, CA_  
_Lisa McDermott, Transplant Operations Analyst, Methodist University Hospital, Memphis, TN, TFCA Workshop Planning Co-Chair_  
_Lisa Donovan, Transplant Financial Coordinator, SUNY Upstate University Hospital, Syracuse, NY, TFCA Workshop Planning Co-Chair_