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

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.

Registration Opens Tuesday, September 29th – 5:00 to 7:00 pm

Day 1: Wednesday, September 30

7:15 am-4:45 pm REGISTRATION OPEN

7:15 am-4:45 pm EXHIBIT AREA OPEN

5:30 pm-6:30 pm EXHIBIT AREA OPEN

7:15 am-8:00 am BREAKFAST

GENERAL SESSIONS

~~ please sit with your UNOS transplant region - signs on tables ~~

8:00 am-8:30 am WELCOME
Debbie Mast, TFCA President, Database Administrator/Financial Manager, Solid Organ Transplant/MCS Program, Stanford Health Care, Palo Alto, CA

8:30 am-9:30 am KEYNOTE: A Survivor’s Experience
Bill Coon, Author, Speaker, Patient Advocate, Infant Heart Transplant Recipient, Adult Heart/Kidney Transplant Recipient, Chicago, IL

9:30 am-9:45 am BREAK with EXHIBITORS
Generously Sponsored by Walgreens

9:45 am-10:45 am Centers of Excellence: The Good, The Bad, The Ugl….The Excellent
Jennifer Milton, BSN, CCTC, MBA, Executive Director, Clinical Assistant Professor, University of Texas Transplant Center, San Antonio, TX

This session will enable attendees to:
- Describe three key benefits of Centers of Excellence designation for solid organ transplant programs
- Outline Transplant program requirements to maintain COE designation
- Review COE volume and outcome benchmarks

10:45 am-11:00 am HeartWare: Challenges in VAD Coverage Policies
Mike Moratz, Associate Director, Market Access, Health Policy and Health Outcomes, HeartWare, Inc., Framingham, MA / VADs Coverage & Reimbursement
11:00 am-12:00 pm  **CONNECT and LEARN!**
- Heart  
- Kidney  
- Liver  
- Lung/Thoracic  
- Multi-visceral  
- Pediatric  
- KPD
  - Communicating and collaborating
  - Learning together
  - Round table session

**Moderators:**
- Lisa McDermott, Transplant Operations Analyst, Methodist University Hospital, Memphis, TN
- Lisa Donovan, Transplant Financial Coordinator, SUNY Upstate University Hospital, Syracuse, NY

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  **NMCP Resources for TFCs**
- Stephanie Farnia, MPH, Director, Payer Policy, National Marrow Donor Program/Be The Match, Minneapolis, MN

2:15 pm-3:30 pm  **CONCURRENT BREAKOUT SESSIONS I**
2:30 pm-3:30 pm  **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 Giacoma, 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

Wednesday September 30th - 5:30 pm to 6:30 pm
with Exhibitors

Generously Sponsored by

National Marrow Donor Program (NMDP) & HeartWare

Day 2: Thursday, October 1st

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<th>Time</th>
<th>Event</th>
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<tr>
<td>7:15 am-5:00 pm</td>
<td>REGISTRATION OPEN</td>
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<td>7:15 am-2:45 pm</td>
<td>EXHIBIT AREA OPEN</td>
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<td>7:15 am-9:00 am**</td>
<td>BREAKFAST ** Note** TFCA Business Meeting starts at 8:00 a.m. for all TFCA Members</td>
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<tr>
<td>8:00 am-9:30 am</td>
<td>15th Annual TFCA (Transplant Financial Coordinators Association)</td>
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<td>Business Meeting [Session Attendance Limited to TFCA MEMBERS]</td>
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<td>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.</td>
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<td>9:30 am-9:45 am</td>
<td>BREAK with EXHIBITORS</td>
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CONCURRENT BREAKOUT SESSIONS III

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<th>Time</th>
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<tr>
<td>9:45 am-10:45 am</td>
<td>3 topics – choose one to attend</td>
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<tr>
<td><strong>Donor Billing: Solid Organ</strong></td>
<td>Financial Facets of Living Donation</td>
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<td>Tracy Giacoma, RN, MSN, MBA, FACHE, Vice President Transplant Services, Methodist Dallas Medical Center, Dallas, TX</td>
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<td>The financial facets of living donation are often hidden beneath a barrage of various payer reimbursement languages. This session presentation and discussion will share what challenges and opportunities have been discovered.</td>
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<td><strong>Donor Billing: BMT</strong></td>
<td>Donor Billing, Coding and Rate Setting - The Impact</td>
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<td>Jugna Shah, MPH, President &amp; Founder, Nimitt Consulting, Washington, DC</td>
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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

- Participants will be able to identify the uninsured costs that patients receiving a lung transplant, heart transplant or LVAD face throughout the trajectory.
- Participants will be able to identify resources to address patient’s related costs both pre and post procedure.
- Participants will learn skills to improve communication in addressing financial issues related to transplant and LVAD placement.

10:45 am-11:00 am

~~ transition to breakout sessions ~~

CONCURRENT BREAKOUT SESSIONS IV
11:00 am-12:15 pm  2 topics – choose one to attend

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

- Do we know our basics?
  - What questions do we ask?
  - How often do I re-verify coverage?
  - How is the patient/family involved?
  - Am I getting the right benefits for transplant?
  - Key terms to know

- Prioritizing
  - Referrals
  - Evaluations
  - Urgent Transplant cases

- We have rates BUT are we contracted?

- Precert/auth process
  - Setting up a case: when/how?
  - Precert process: general, by plan, by organ
  - Do I always need to send records? How much is too much?
  - Cover letters/Appeals/Developing relationships

ICD 10 – Rx for Success
ICD 10: Rx for Success – Time to be ready!
Carolyn Rubin, Senior Director Revenue Cycle Innovations, Anthelio Healthcare Solutions, Fort Worth, TX

12:15 pm - 1:30 pm
LUNCH

GENERAL SESSION
1:30 pm-2:30 pm
UNOS Initiatives & Strategic Plan
Betsy J. Walsh, J.D., M.P.H., UNOS President-Elect, Vice President and Deputy General Counsel, Novant Health Inc., Charlotte, N.C.

2:30 pm-2:45 pm
BREAK with EXHIBITORS

~~ Exhibitor Bingo Drawing at 2:40 p.m. – You must be present to win ~~
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, VA
Lisa McDermott, Transplant Operations Analyst-Solid Organ & Bone and Marrow Programs, 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 breakout sessions ~

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

7:30 am-12:30 pm
REGISTRATION OPEN

7:30 am-8:30 am
BREAKFAST

GENERAL SESSIONS

8:30 am-9:30 am
Government Sponsored Health Insurance

Government Sponsored Health Insurance: Medicare, Medicaid, and CHIP
- Program essentials
- Comprehensive question & answer session
Natalie Duy, Centers for Medicare & Medicaid Services (CMS), Regional External Affairs, Kansas City, MO

Moderator: Lisa McDermott, Transplant Operations Analyst, Methodist University Hospital, Memphis, TN

9:30 am-10:00 am
Extended Q&A with CMS staff

10:00 am-10:30 am
BREAK

10:30 am-12 pm
Health Insurance Marketplace

Private Health Insurance Market: Health Insurance Marketplace
- An Interactive Overview
Natalie Duy, Centers for Medicare & Medicaid Services (CMS), Regional External Affairs, Kansas City, MO

Moderator: Lisa McDermott, Transplant Operations Analyst, Methodist University Hospital, Memphis, TN

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