

Session Key Codes:

(HH) Home Health, (HOS)- Hospice, (PSA)- Personal Services Agency

Wednesday, May 6<sup>th</sup>

Day 1 - Keynote Presentation: 9:00am – 10:30am

**101 - Oppositioning: One Surprising Strategy for Innovation and Differentiation – David Rendall (HH HOS PSA)**

What can tiny houses, Spartan races, knuckleball pitchers, unibrows, Snapchat, and Minecraft teach us about creativity, innovation, and differentiation? We all know that innovation and differentiation are essential, but developing and implementing truly unique ideas seems very difficult, and most fail to become more creative and distinctive. The solution is surprisingly simple. An unusual method for finding unconventional ideas that will dramatically improve your ability to stand out and produce an endless supply of original breakthroughs. You'll go from unconventional to unforgettable to unstoppable.

**Sponsor:** BKD, LLP

Day 1- Concurrent Sessions: 10:45am - 12:15pm

**102 - Legal Update: Seeing the changes clearly – Robert Markette (HH HOS PSA)**

This session will provide a broad overview of major changes impacting, home health, hospice and private duty providers. We will look at new legislation from the state and federal level that impact operations. This will include a brief review of what we have seen in 2020 of life under PDGM and with the RAP phase out, state and federal court rulings, new DOL regulations, EEOC and DOL enforcement actions, CMS guidance on CoPs, HIPAA enforcement, and other updates. We will discuss how these changes will impact home health, hospice and private duty providers and strategies to consider moving forward.

*Hall, Render, Killian, Heath & Lyman, P.C.*

**103 – Executive & Cyber Liability-What You Do Not Know May Hurt You – Phillip Holderness & Norma Boyd (HH HOS PSA)**

This presentation focuses on what the insurance industry refers to as “Executive Liability”. Executive Liability encompasses Directors & Officers, Employment Practices, Fiduciary, Cyber Liability and Employee Theft. Topics will include:

- 1) How senior executives and managers have exposure in all of these “liability” areas and how some of that exposure or liability may actually be “personal”
- 2) How to protect against the exposures

- 3) Where do I find insurance coverage for these areas
- 4) How does the insurance coverage work

*McGowan Insurance Group LLC*

#### **104 - The Four Factors of Effective Leadership – David Rendall (HH HOS PSA)**

Do you want to be a better leader? Whether you're a manager, parent, teacher, coach, or board member, these four factors will help you improve your ability to lead others. Each factor combines the wisdom of ancient philosophers, successful executives, and leadership gurus with common themes from scientific research as well as examples from the lives of famous leaders and infamous failures.

*Day 1- Concurrent Sessions: 1:45 - 3:15pm*

#### **105 – Fixing the Talent Shortage in 2020 – Karl Ahlrichs (HH HOS PSA)**

Good news/bad news. The economy has improved and many organizations are hiring more carefully, but most are fighting a global talent shortage for skilled employees at every position. In this entertaining and fast paced session, Karl Ahlrichs will share “next practices” that you can immediately use to source, screen and retain skilled employees in your organization. Karl has broad experience in recruiting, selection and retention of high performing work teams, and has collected recent examples of what works and what falls short.

*Gregory & Appel*

#### **106 – PDGM: Creating New Compliance Challenges – Robert Markette (HH HOS PSA)**

PDGM is the biggest change in home health in 20 years. PDGM's focus on the patient's characteristics includes a focus on the source of admission and the timing of the admission in relation to other home health episodes. In addition, PDGM changes the billing cycle to a 30 day cycle and now, in the PPS 2020 rule, CMS has announced that it will be phasing out the RAP. Agencies can rely upon CMS to code admission source and timing based upon claims data or they can choose to hard code this information themselves. Agencies that choose to hard code these items will need to be prepared to defend their coding. This will require a number of additional compliance considerations, including intake and billing staff education, process for gathering documentation and changes to audit efforts. This will all be compounded by the time pressure created by the 30 day billing cycle. Agencies must be prepared to address these issues to avoid later audit problems.

*Hall, Render, Killian, Heath & Lyman, P.C.*

### **107 – Home Health Practices of Top Performers – Aaron Little and Karen Vance (HH)**

Home health operations continue to be challenged to manage quality and patient experience in a cost-effective manner. This session will share updated results from the 2020 BKD and Strategic Healthcare Programs (SHP) annual benchmark leader analysis, which is an ongoing study on the quality, financial and operational key performance indicators (KPIs) of top performing agencies. In addition to KPIs, operational approaches and strategies these top performing agencies use to achieve optimal results will also be shared.

*BKD, LLP*

### **108 – Known Unknown: Compliance, Risk Aversion & Change – Debbie Pierson and Yonda Snyder (HH HOS PSA)**

When your agency faces strict regulation from government, payors, or funders, it can create a risk-averse culture where compliance becomes the overwhelming focus. This session will discuss why some organizations become risk adverse, how that hinders the service provided to clients, and what you can do to create a culture focused on quality and excellence. Discover how you can overcome a risk averse culture in order to go beyond compliance. It's time to think bigger!

*Sage Squirrel Consulting, LLC*

### **109 – Red Flags and the PEPPER – Petria McKelvey (HH)**

Have you checked your PEPPER? Did you even know you have a PEPPER? CMS uses PEPPER as a guide for auditing and monitoring efforts. Although it does not identify improper payments, it can be used to identify practices that may lead that way. Petria will assist you in utilizing the PEPPER for identifying and correcting behaviors before the Review Choice Demo and before the next round of TPE..

*Precision Medical Billing*

### **110 – Unique Employment Concerns – Thomas Harper (HH HOS PSA)**

This session will address unique employment concerns. Topics will include the EEOC's recent focus on enforcement of anti-discrimination and anti-harassment for caregivers subject to harassment or discrimination from clients (even in situations of dementia) and measures agencies can take to alleviate the risk; the effectiveness of arbitration clauses and class action waivers; joint employment in relation to workforce development and wage and hour requirements; and con-compete agreements; among other timely topics.

*Gilliland, Maguire & Harper*

*Day 1- Concurrent Sessions: 3:30 – 5:00pm*

**111 – PDGM Best Practices – Petria McKelvey (HH)**

PDGM brings many changes in your Revenue Cycle Management. Imagine twice the number of RAPs and claims as are now completed. What kinds of operational changes will need to be made?

*Precision Medical Billing*

**112 – Survey Update: Current Trends and Considerations for Survey Prep – Robert Markette (HH HOS PSA)**

Surveys are an ongoing source of compliance difficulty for providers. Each year, surveyors have new areas of focus. This session will review survey data and trends to identify survey issues for both home health and hospice. We will address new interpretation offered by surveyors related to missed visits, plans of care and staffing and other issues. We will then turn to survey preparedness including issues related to patients ability to refuse a home visit, after hours calls to staff, EMR access and more.

*Hall, Render, Killian, Heath & Lyman, P.C.*

**113 – Closing the Loop the Between Patient Assessment and Plan of Care Workforce of Nurses and Caregivers – Barbara Provini (HOS)**

This presentation will explore the art of creating and maintaining a plan of care that reflects the patient's current physical, psychosocial, and spiritual needs as those needs change throughout Hospice Care. Compliance under Hospice 418.56: Interdisciplinary group, care planning and coordination of services is among CMS's reported Top 10 Deficiencies. Through review of the Hospice regulations around both assessment and care planning, the attendees will be able to identify opportunities to create a more patient specific plan of care.

*ACHC*

**114 – 10 Changes Home Care Agencies can Make to Improve Staff Satisfaction and Retention – Cheryl Reid (HH HOS PSA)**

The growing labor shortage is perhaps the largest threat to the home care industry today. To meet the burgeoning demand for home care in the U.S. alone, by 2026 the industry will need roughly [1.3 million home health aides](#) and 2.7 million personal care aides. More long-term care workers [leave the field](#) than enter it. In 2030, the U.S. is predicted to have a shortage of [151,000 paid direct care workers](#). By 2040, the shortage will grow to 355,000. [60%](#) of private

home care agencies identify care provider shortages as one of the top three threats to the future growth of their businesses.

With a rapidly aging population and with growing complexity of care provided in home care, the shortage of staff presents a major quality care and safety issue for all home care agencies. We are seeing new players entering both the home care provision space but also the care provider space with unique models to begin to address the health human resource shortage.

*CellTrak*

### **115 – New Technologies to Improve Day to Day Operations While Creating Cost Savings – Steve Pellito (HH)**

With recruitment, retention, and staff shortages plaguing the home health care industry, agencies are struggling to find and onboard new staff, properly utilize existing staff, and increase efficiencies in the home office to keep operations as lean and efficient as possible. Learn about some of the newest technologies that are reinventing the way agencies are approaching the traditional scheduling process. Communicate more effectively, maximize caregiver potential, reduce overtime, and decrease turnover/recruitment/onboarding costs.

*Sandata Technologies*

*Day 2 - Keynote Presentation: 8:30am – 10:00am*

### **201 – Home Care & Hospice 2020: An Update from Washington – William Dombi (HH HOS PSA)**

Bill Dombi serves as the President of the National Association for Home Care and Hospice and is directly involved in all of the initiatives focused on Home Health, Hospice, and Personal Services at the national level. Bill's presentation will focus on the recent regulatory changes that have affected these industries over the past year, the impact on your agency, and what changes might be necessary to comply with those changes. This includes Conditions of Participation, Payment Rates, Payment Reform (VBP & HHGM), and others. Bill will also focus on the legislative opportunities that will need support from IAHC members in the coming months. Attend this session to hear from the leading expert in our industry.

***Sponsor: BKD, LLP***

*Day 2- Concurrent Sessions: 10:15 – 11:45am*

**202 – Care Transition: Spotlight on Caregivers – Melanie Morris (HH HOS PSA)**

Clinicians encounter individuals at every setting and at each state of transition in care. They know well the challenges that caregivers face when trying to coordinate care and advocate for the person they are caring for. This session will equip these clinicians with the knowledge, skills, and confidence to partner with caregivers to ensure safe transitions for the person they are caring for.

*Caregiver Homes from Seniorlink*

**203 – Acquire & Expand – Understanding Growth Through Acquisition, the Transaction Process & the Value of Your Agency – Alexander Fritz (HH HOS PSA)**

The stock market is hitting all-time highs and the healthcare sector is booming. Is now the time to sell? This session will discuss the four P's of a successful agency transition (for an agency owner that is interested in purchasing another agency or selling their own): Partner, Plan, Promote, and Purchase. We will discuss each phase of the transition process and spend time discussing how select the most suitable transition advisor, how business valuations are performed and values arrived at for setting an appropriate sales price, selection of suitable buyers, and the due diligence process and closing process.

*Blue & Co, LLC*

**204 – Fostering Success through Relationships – Lisa McClammy (HH HOS PSA)**

This session will discuss the importance of leadership in creating strong internal and external relationships to foster a culture of success. We will discuss different levels of leadership and how a strong leadership team can ensure the success of an organization. We will also discuss the changing culture of healthcare and how important it is to engage all staff in order to maintain healthy relationships, within your organization, with patients, referral sources and other partners. We will discuss the qualities of excellent leaders and how they motivate staff to build relationships and increase referrals for your organization.

*KanTime Inc.*

### **205 – Methods to Effectively Address PDGM Coding Issues – Stacy Gatson (HH)**

The Patient-Driven Groupings Model (PDGM) became effective January 1, 2020, and it's clear that coding has changed under the new payment system. Two of the five PDGM subgroups are directly related to coding: Clinical Grouping and Comorbidity. During this session, we will review issues that can transpire with ICD-10-CM coding under the PDGM, and discuss action plans that home health agencies can implement to address these issues in order to succeed under the PDGM.

*5 Star Consultants*

### **206 – Critical Updates for Employee Handouts in 2020 – Eileen Maguire (HH HOS PSA)**

Employment laws that impact employee handbooks are constantly changing. This presentation will review recent employment law changes for purposes of ensuring your handbooks are up-to-date. This presentation will also review best practices for implementing useful policies and trainings, and will provide sample policies.

*Gilliland, Maguire & Harper*

### **207 – Replacing QE Clinical Groupings for Appropriate Therapy POC – Karen Vance (HH)**

Agencies are challenged in identifying clinical groupings to replace questionable encounters (QE) that were long used to explain the reason for therapy in home health. Identifying an appropriate clinical grouping must also meet the requirement for plans of care that are 'reasonable and necessary for the patient's illness or condition'. This session will use case studies to identify the most common QEs and learn how to use clinical reasoning to replace them with the most appropriate clinical grouping and most effective therapy plans of care.

*BKD, LLP*

*Day 2- Concurrent Sessions: 1:15 – 2:45pm*

### **208 – Empowering the Dementia Caregiver: Knowledge, Self-Care, and Support – Melanie Morris (HH HOS PSA)**

Dementia caregivers are all around us- Clinicians work with family caregivers every day, in every setting, and often this is not their area of specialty, or even an area they know much about. According to the Alzheimer's Association "Facts and Figures Report" from 2017, at that time Indiana had over 338,000 Caregivers for people with Alzheimer's and other Dementias; providing 385 million hours of unpaid care; valued at over 4.9 billion dollars.

Clinicians will be empowered to recognize and support Dementia Caregivers before they ask for support. If clinicians wait for caregivers to self-identify and ask for help, it may not happen. Often times, family caregivers do not recognize ways that they can improve their overall experience, and it is the job of clinicians to educate and coach caregivers on ways to improve their experience as caregivers, and in turn the experience of their care recipient.

This vital cohort- Family caregivers- providing hundreds of millions of hours of care to one of the most complex populations, is at risk themselves. Clinicians will leave having learned 3 areas for caregiver support that can make an impact. Family Caregivers are at higher risk for depression than the general population. Family Caregiver Alliance reports Caregivers of people with dementia as having twice the prevalence of depression than non-dementia caregiver groups. When caregivers suffer from Depression, the psychological, physical and emotional symptoms take a toll on the caregiver, care recipient, family unit, and healthcare system.

*Caregiver Homes from Seniorlink*

**209 – Orientation in Home Care: Organizing, Coordinating, Facilitating and Individualizing Orientation to Meet the Multifaceted Needs of Today’s Home Care Agency – Tricia Metzger-Osting and Kara Peters (HH HOS)**

How do we best serve new nurses who are hired to the agency – especially during a time when they can pick and choose among employers? As care of the patient at home has changed, so has the way we orient nurses. In the ever-changing world of healthcare outside of the hospital walls, let’s discuss what’s worked and what hasn’t – from our teaching strategies to supporting the qualities that make a nurse successful in home care.

*Parkview Home Health and Hospice*

**210 – Thriving in Environments of Change: CARE – A Model for Recruiting and Retention – Adrian Killebrew (HH HOS PSA)**

For the first time in history, five generations can be found working side by side in the workforce. The year 2020 brought the start of PDGM for home health agencies, EVV implementation for organizations that bill Medicaid and many other changes for all organizations that provide care in the home. By the year 2025, Millennials will comprise 75% of the world’s talent workforce. With all of the changes in the industry organizations need new strategies for recruiting and retaining employees that transcend industry challenges. Come learn about CARE a universal model for recruiting and retaining staff during times of change.

*Axxess*



### **211 – Achieving OASIS Accuracy Through Effective Team Collaboration – Stacy Gatson (HH)**

The Importance of OASIS Accuracy is Imperative Under the PDGM. This session will focus on the critical role team collaboration plays in achieving the most accurate OASIS Functional Score, as well as establishing an effective Plan of Care to improve patient outcomes. In this session we will discuss strategies you can employ to reap the rewards of effective team collaboration.

*5 Star Consultants*

### **212 – PDGM, FLSA and Your Employees: Aligning Employee Financial Incentives to Agency Incentives Under PDGM – Robert Markette (HH HOS PSA)**

With the elimination of therapy thresholds, home health reimbursement is now tied 100% to patient characteristics through the HHRG. PDGM will reward agencies who provide high quality, efficient, patient focused care. This care will continue to include therapy. As agencies consider changes that will be necessary to be ready, one key area to consider is employee compensation. In a payment model that rewards your agency for quality and efficiency, rewarding your employees for volume, as happens when nurses, therapists and others are paid per visit, may no longer make sense. Agencies will need to carefully consider current payment and bonus structures in light of these changes and, of course, state and federal wage and hour laws. This session will review the basic requirements related to minimum wage and overtime under the Fair Labor Standards Act. We will then review some common payment models in light of both the FLSA and PDGM. We will consider the wage and hour compliance risks as well as the employee incentives they create. We will then assess whether the incentives this creates for your staff align with the incentives PDGM creates for your agency.

From there, we will consider compensation structures that will better align your employees' goals with yours while reducing the risk of non-compliance with federal wage and hour laws, Medicare rules and other regulatory requirements.

*Hall, Render, Killian, Heath & Lyman, P.C.*

### **213 – Top Five Hospice Medical Review Denials and How to Avoid Them – Leslie Heagy (HOS)**

- Participants will be able to list the top denials currently happening in Targeted Probe & Educate
- Participants will be able to define the outcomes/findings from the recent OIG report regarding hospice audits
- Participants will be able to detail documentation requirements to avoid audits.
- Participants will be able to check off the list of required elements to submit with a chart that is being submitted for review. *Healthcare Provider Solutions*

*Day 2- Concurrent Sessions: 3:00 – 4:00pm*

**214 – EVV Implementation for Medicaid Waiver Services – Shantel Silnes and Michael Cook**

*DXC*