President’s Message

Welcome members to autumn in Western New York. Hope you all had a wonderful summer and are enjoying the new fall season. The September weather was one of the best that I can remember and the October foliage is beginning to unfold for what we hope will be a wonderful season.

For this issue of Fine Print, I wish to devote this article to Volunteer Engagement and to a related topic, Succession Planning. Volunteer contributions are crucial to HFMA and, in particular, to our chapter. We rely on our volunteers to contribute to the continued success of the chapter. Without their dedication, we would not be able to meet our annual goals for achieving a successful year. We are required to have certain pre-established goals that are set by HFMA and our volunteers are the ones we rely on to help us achieve these goals.

Volunteer Engagement

Membership in HFMA means that you belong to the leading national organization that concentrates fully on healthcare finance. Our membership is diversified and comprised of professionals from providers and non-providers with various levels of responsibility, ranging from the CFOs, to Revenue Cycle managers, to consultants. Therefore, our goal is to attract and secure volunteers that represent all of the different levels of professional responsibility.

Finding the right mix of volunteers to meet the chapter’s needs is no easy task. We are fortunate to have members volunteer to become involved. However, most often members have to be solicited and asked to become involved. Most of this occurs during the middle of each chapter year when the leadership team is assembled for the next chapter year. At this time, existing leaders are polled to determine their continued interest in staying involved and whether or not they would like to continue in their current role or to assume a different one. There are always some areas that will require new leaders who are willing to assume the needed roles.

So, how do members become volunteers and involved with HFMA? For the most part, it is a joint process, i.e., the chapter has specific needs to fulfill and the members have specific professional goals to achieve in their career path. Many volunteers are requested by their employer to become involved in HFMA as part of their job responsibility. Others feel that they will benefit the most for themselves and their employer if they do assume a leadership role in HFMA. In both of these situations, there has to be a mutual benefit achieved by the members and the needs of the chapter.

The best examples I can give are based on my own experience. I first became involved in the early 1990’s when I was approached by Mike Sammarco, the Chapter President at the time, to determine if I would be interested in becoming a chapter leader. He indicated that there were open Board of Director positions that needed to be filled. After learning about these duties, I indicated that I would be interested. Shortly thereafter, I was elected to a two-year term and actually served three years as a board member. Once I became involved, I was asked to join a committee and assist in their programming for the year. At the time, the chapter had a CFO/Controller Committee that held a few programs per year of specific interest to this group. It later became included in the present Education/Program Committee.

As many of you know, I left Western New York in 1999 and moved to Birmingham, Alabama as a result of a job change, returning in 2006. In 2009, I decided to...
again become involved with the chapter and let the current leadership know of my intentions. However, it took a while before the right role would come along. In response to a solicitation by Jennifer Dunn in early 2011, the incoming President of the chapter, I volunteered to fulfill the need of Co-Chairing the Certification Committee.

The above examples are perhaps similar to others who have become involved in HFMA. That is, sometimes members are asked to fulfill specific chapter needs and sometimes the members have to pursue a role that fits their own specific professional needs. The examples fit both situations.

Succession Planning

The following is extracted from HFMA guidelines:

Succession Planning is essential to the fulfillment of HFMA’s mission on the local level. Effective succession plans have been identified as a key indicator of chapter success. Identifying successors for all levels of volunteer leadership positions as well as thinking through backup plans for unplanned departures can help avoid distraction to the board, key stakeholders and the membership. The first step is to address the situation. All roles should be considered, including leadership structure, the qualifications of the positions, the responsibilities and the time commitments for each position. An effective succession planning process is built upon the following four steps:

- Define the leadership requirements
- Identify and evaluate the current talent pool for succession into leadership
- Create a plan of action for developing a larger talent pool
- Document the plan and ongoing process

The first step for becoming a chapter leader is to volunteer for a leadership role. Becoming a board member and/or a chair or co-chair of a standing committee fulfills that role. As noted above, being solicited or requesting to be considered starts the process. However, keep in mind the qualifications, responsibilities and the time commitments for the position that needs to be filled. Also noted above, the process accelerates during the planning for leadership positions before the start of each chapter year.

Each year, candidates are considered to fill open positions beginning with the Officers and the Board of Directors. The membership is solicited for nominations. Self-nominations are encouraged. There is a Nominations Committee that meets and considers all nominations that have been submitted. Chosen candidates are contacted to determine their acceptance, if nominated. A slate is agreed upon and presented to the membership for their approval. The next process is to fill committee chairs and co-chairs. There are certain committees required and additional ones that are filled based on the chapter’s needs.

The current practice of the chapter is as follows:

The process for nominating board members includes consideration of candidates that may wish to become involved for more than the required term.

Board members are encouraged to become active on one of the committees. This serves as a mutual benefit since the board members get involved in a specific role and the chapter can assess how well they fit that role for possible consideration of advancement to the officer ranks.

If there is mutual agreement that a leader may want to be considered as a future officer, the chapter schedules the member to attend an HFMA Leadership Training Conference (LTC).

Those moving up to the officer ranks are the ones that have demonstrated success in their role as a chapter leader and are willing to accept the requirements and time commitment of each of the officer positions. Presently, the Secretary, President-Elect and President are on a rotating basis in that order.

Summary

We encourage all of our members to become involved in chapter activities. There are many opportunities available. For some, just assisting in some matter is sufficient. Examples would be to help with putting on a chapter program, such as handling registrations, or simply to serve as a committee member. For others, perhaps a more active role as a board member or being a committee chair or co-chair is a good choice. Besides the three rotating officers, the chapter currently has a Treasurer who serves a two-year term. The standing committees include Certification, Education, Membership, Newsletter, Reimbursement, Revenue Cycle, Social Events and Sponsorship. We also have members who fit the roles of Davis Chapter Management System (DCMS reporting), Founders (volunteer merit award program), the Regional Institute and Webmaster. This year, we added an Assistant Treasurer position.

Next year’s process for the selection of chapter leadership is scheduled to begin in December and required to be in place by March 1, 2015. Be on the lookout for receiving a request for nominations for the officer and board positions. We rely on our
As the current president-elect of the Western New York chapter I had the opportunity to attend the annual fall presidents meeting. This year the meeting was held from September 21 – 23 in Chicago, IL. For those of you who are not familiar with this meeting it is an opportunity for all of the regional leaders to convene and discuss regional business, share ideas best practices, and review each chapter’s performance to date. This meeting is attended by the President and President-Elect for each chapter. Our Region (Region 2) is made up of the individual chapters from Western New York, Rochester, Central New York, Northern New York, Metro New York, Hudson Valley and Puerto Rico.

For the first time HFMA National required all fall presidents meeting to take place at the same location. While it was disappointing that the region lost the ability to choose the location to hold this meeting, there were also benefits to this change. As a region we were given better access to national leader as several were able to sit in on our session and provide us their insight. We were provided an opportunity to socialize and network with other leaders from around the country, and it removed the administrative burden of having identified and secure a location to hold these meetings.

The meetings started with a strategic direction update provided by Joe Fifer, President of HFMA. The balance of Sunday and the majority of Monday and Tuesday morning were spent with our regional leaders. Some of the highlights of the regional meeting were a complete review of the Region 2 operating agreement, discussion and sharing of best practices across the region, review of the regional financial performance and budget for the upcoming year and appointment of the 2016-2017 Regional Executive. The appointment of the regional executive is rotated between all of the chapters annually. Some of the highlights of the regional meeting were a complete review of the Region 2 operating agreement, discussion and sharing of best practices across the region, review of the regional financial performance and budget for the upcoming year and appointment of the 2016-2017 Regional Executive. The appointment of the regional executive is rotated between all of the chapters annually. I would like to congratulate Eric Fehrman, CPA for his appointment by the Central New York Chapter to serve in this role.

There is also plenty of time to network with other chapter leaders as part of these meetings. On Sunday night our region enjoyed dinner at the world famous Harry Carry’s Italian Steakhouse. On Monday took in a baseball game at the friendly confines of Wrigley Field. This downtime provides participants the opportunity to network and develop relationships with the other regional leaders. These relationships are invaluable as you progress through your years as a leader of the chapter.

The ability to participate in meetings like this is one of the many benefits of becoming an officer in the local chapter. I would encourage anybody who has ever looked for ways to develop your leadership and networking skills further give serious consideration to becoming more involved in the chapter. We are always looking for people willing to help. You will get as much out of your participation as you give. If interested feel free to reach out to me directly or any other leader of the chapter.

The current leadership is comprised of seasoned veterans as well as newer members. A proper mix allows us to provide the continuity of experience as well as the mentoring of future leaders. If you have been involved in the chapter, past or present, we thank you and are grateful for your contributions. If you have not been involved, please consider doing so. Volunteering serves to benefit the members as well as the chapter in order to meet HFMA requirements and allowing continued success. Perhaps you will be solicited or you can come forward and let us know your interest. It’s that simple.
Hello Colleagues!

Today is Sunday, and I am just arrived from Verona, NY, where we successfully held our Region 2 Fall Institute 2014. I feel plenty of satisfaction because the work was hard, and there were a lot of details to manage, but with the collaboration of the seven coordinators, plus our Regional Treasurer, RE-Elect and Mr. Bruce Liebel, the task was manageable, and we did it, and we did it great!

I want to take this opportunity to thank again each one of the team members that composed the Region 2 Institute 2014 Committee: Karen Carter from Central NY Chapter, Kristen Zebrowski from Hudson Valley Chapter, Cindy Strain from Metro NY Chapter, Rabin Kayastha from Northeastern NY Chapter, Rafael Rodriguez from the Puerto Rico Chapter, Alicia Dockrell from Rochester Regional Chapter, Christine Blidy from Western NY Chapter, Mollie Kennedy, Regional Executive-Elect, John Cousins, Regional Treasurer, and Bruce Liebel of course, Outgoing RE for Region 2.

But first, I want to go back to an activity that occurred before the Fall Presidents Meeting (FPM). 2014 was the first year in which the FPM was carried out in the same locality, simultaneously for all regions that comprise HFMA. This event started on Sunday the 1st, and culminated on Tuesday, September 23. It was held in Sheraton Hotel & Towers in Chicago. The new format of the meeting allowed chance for two regional activities; the first was the dinner at Harry Caray's and the second was the game of the Chicago Cubs (who unfortunately suffered a defeat against the Cardinals). But nothing fogged the fun and enjoyment of being together at Wrigley Field. It was a great experience, and the 2014 “new format” FPM was a great one, where all the Chapter Presidents and Presidents Elect shared their thoughts, ideas, suggestions and concerns. Thanks to all of you for your active participation.

Returning to Region 2 Fall Institute 2014 let me tell you some details. As we are those who live the farthest, Rafael Rodriguez, Coordinator for the Puerto Rico Chapter, and I traveled on Tuesday 21st so we were already at the Turningstone first hour of Wednesday 22, when the event officially started with the welcome reception. We departed from San Juan at about 11:00 a.m. Tuesday and arrived at the hotel at approximately 8:00 pm. Yes, it was a long way...

The next morning, after handling several details in relation to the event, I met Rafael, we had lunch, and continued to the Birch room, where we would find all the volunteers for stuffing the bags. Many voluntary hands collaborated with this task and we were ready to begin with the pre-registration. At the same time, since 1:00 pm was taking place the pre-Conference session on Certification Coaching. This was an innovative element that was incorporated for the first time to the Region 2 Institute, and was a great success of assistance. Our most expressive thanks to the Region 2 Certification Committee, for this extraordinary initiative. Pre-registration lasted about an hour, and we moved to the Clubhouse, where the welcome reception would take place. It began at 5:30 pm busy way. We had appetizers and drinks, and at 7:30 started the music with the duo Alive N Kickin’, who entertained us until the activity concluded at 9:30 pm. There was dancing and singing, pleasant camaraderie, fun and share. Thanks to all those who gathered there!

It got to Thursday and formally began the educational event with the greeting of the Regional Executive (me), and presentations by HFMA President, Mr. Joe Fifer and HFMA Chair, Mrs. Kari Cor-
nicelli. Everything went as scheduled, and all the educational sessions were very crowded. All concluded Friday with the Closing General Session. Our most expressive thanks to all those who were cited there, to all of our Speakers, and especially to our sponsors; without them, this activity would not be possible.

What is next? The Regional Executive Council Meeting in Chicago, next November 8-9, 2014.

I will have more details for you in our next edition.

Stay tuned!

Bruce Liebel, FHFMA and Past Regional Executive prepares registration materials for the 2014 Region 2 Conference at the Turningstone Resort in Verona, NY
ANNOUNCING THE CHAPTER MEMBERSHIP SATISFACTION SURVEY

On or about October 21, National HFMA emailed the annual Chapter Membership Satisfaction Survey. While participation is optional, we strongly encourage you to complete and submit the survey so the Chapter Leadership can improve the services available to you, our valuable members.

Sincerely,

Chapter Leadership
Western New York Chapter of HFMA

Jeffrey Jacobs Earns Fellowship Designation

The Chapter is pleased to announce Jeffrey Jacobs, Director Financial Planning & Decision Support at Erie County Medical Center, has earned the designation of Fellow from National HFMA. Fellows act as ambassadors to the profession by raising the standard of practice and service to the healthcare finance industry. Jeff served as the WNY Chapter’s immediate past President (2013-14) and under whose leadership the Chapter achieved regional and national recognition. Jeffrey's Fellow designation is well earned and well deserved and we congratulate him on his latest achievement.

Submitted by John P. Eichner, CPA, FHFMA

The WNY Chapter of HFMA is pleased to present the following educational calendar for the 2014-2015 chapter year.

SAVE THE DATES

WNY HFMA Programs

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<thead>
<tr>
<th>PROGRAM</th>
<th>DATE</th>
<th>LOCATION</th>
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<tr>
<td>No Fault Education Session</td>
<td>Nov 7, 2014</td>
<td>Ilio Di Paolo’s</td>
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REGISTRATION NOW OPEN!!! Blasdell, NY
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<th>PROGRAM</th>
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<tr>
<td>Long Term Care Institute</td>
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<td>REGISTRATION NOW OPEN!!!</td>
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<td>Chargemaster Review</td>
<td>Feb 4, 2015</td>
<td>Classics V</td>
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<td>Amherst, NY</td>
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<tr>
<td>Spring Institute</td>
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**WNY HFMA Chapter Planned Programs**

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<tr>
<td>Data Analytics</td>
<td>December 2014</td>
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<td>Women’s Initiative</td>
<td>January 2015</td>
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<td>Cost Report and Reimbursement</td>
<td>April 2015</td>
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<td>Update</td>
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**Region 2 Webinars**

There are a number of webinars that are being planned as of the date of this newsletter. The following have been firmed up. The dates are subject to change.

**November 6, 2014  Using Measure, Apply and Perform to Achieve Excellence in Revenue Cycle Operations**

**REGISTRATION NOW OPEN!!!**

- December 18, 2014  APC Update
- January 28, 2015  Proposed 501 R Regulations
- March 25, 2015  Medicare Non Physician Practitioner Billing
- March 2015  Observation Services

Regional webinars are free to members and non-members.
Upcoming Events and Announcements

National Live Webinars

More information is available on HFMA.org

November 6  A Clinically Integrated Approach to Improving Healthcare Quality, Cost, and Efficiency

November 11  Reshaping the Physician Fee Schedule for Physician Services to Integrate Engagement and Payment

November 12  Understanding the 2014 U.S. Trust study of High Net Worth Philanthropy

November 13  How a Clinically Integrated Network Reduced Risk by Engaging High-Risk Patients

November 19  Dignity Health: The Making of a New Revenue Cycle Management Model

November 25  Personalizing the Patient Experience: The Ultimate Objective of Population Health

December 4  Choosing the Right Methodology for Predicting Patient Demand

December 10  The Critical Role of Clinical Integration in Revenue Integrity

December 18  2015 Final Rule Changes to Outpatient Payment System (OPPS) and Ambulatory Service Center (ASC)

Most live webinars are free for HFMA members and $99 for non-members.
Recent Social Events: Annual Banquet

Recent Social Events: Octoberfest

Bob Levesque, Chris Eckert, Mike Schoell

Stephanie Bottomley, Liz Krause, Dan Swift, Jill Johnson, Andy Johnson, Bruce Liebel