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The 2015 Morrisey Technology and Educational Conference
20th annual user group meeting
CHICAGO AUG. 19-21, 2015

"The Evolution of Healthcare Technology, Advancing to a More Connected Future"

The Hyatt Regency Chicago
151 East Wacker Drive
Chicago, Illinois 60601

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Registration Information

Online Registration Form

Hotel Reservations:
Group Rate: $199/night, book by July 22
- Online here
- By phone, (888) 421-1442 and mention the **Morrisey Associates Event**

Full Meeting (Aug 19-21)

Early Bird Registration $575
(Registration and payment must be received before July 17, 2015)

Standard Registration: $675
(Registrations received after July 17, 2015, payment must be received by August 7, 2015)

One-Day Registration: $425

Pre-Conference
(Aug 17-18)
MSOW Advanced Crystal Reports $750
MSOW New Hire Training $750

MSOW Certification Exam (8/18) $75

Registration Fee Payment:

- **Credit Card** (via online registration)
- **Check**
  - Please make check payable to **Morrisey Associates** and mail it with a copy of your registration confirmation email to:

  Morrisey Associates, Inc.
  222 South Riverside Plaza
  Suite 1850
  ATTN: Lilibeth de Leon
  Chicago, IL 60606

  (Please verify with your Accounts Payable Department that payment will be mailed to this address)

NOTE:
All payments and registrations are <u>final</u>. No refunds or transfers will be provided.

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Conference Planning Committees

Credentialing/Privileging Customers

Renee Aird Dengler, RN, MS, CPMSM, CPCS |Advocate Health Care

Charlotte Busbee, BAS | CHE/Trinity Health

Karen Crotinger, MS, CPMSM, CPCS | Allina Health System

Suzanne Cummings, MS, CPCS | Aurora Health Care

Candace Gwizdalski, RN, BSN, MA, CPMSM, CPCS | Advocate Health Care

Dorothy Jambrosek | Cadence Health

Lisa Mangan, CPCS | Stanford Hospitals and Clinics

Tonshea S. McBath | Cadence Health

Christy Palmer | Hennepin County Medical Center

Rose Stern, CPMSM | All Children's Hospital

Beth Thornton, BA, MSOW-C | Alexian Brothers Health System

Melissa Walters, MHA, CPMSM, CPCS, MSOW-C | Johns Hopkins Health System

Care Management Customers

MaryBeth Bednarz, RN, BSN, CCDS, ACM, CPUM | Charlotte Hungerford Hopsital

Sarah Clark, RN-BC, BSN, MHA/INF, CCM | Sentara Healthcare

Robin Hynds | Lawrence General Hospital

Mony Icaza | All Children's Hospital

Lori Melberg | Hennepin County Medical Center

Jennifer Miller, MS | Children's Hospitals and Clinics of Minnesota

Janet Montague, MBA, BSN, RN | Methodist Le Bonheur Healthcare

Teresa Riehle, RN, BSN, MBA, ACM | Community Health Systems

Misty VanCampen, RN, BSN, CCM | Cook Children's Health Care System

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Christy Baranowski, CPA | Vice President and CAO

Beth Brand | Vice President, Customer Experience

Richard Chappe |Senior Vice President

Paul Glick |Senior Vice President

Jeffrey Joo | Vice President, Sales

Mark Stowes, MBA | Vice President, Marketing

Jim Nutter | President

Vicki Searcy | Vice President, Consulting Services

Mark Smith, MD, MBA, FACS | Vice President and Chief Medical Officer

Gerald Zoldan |Chairman and CEO

Robert Zoldan| Senior Vice President

Morrisey Planning Teams

General Planning Team

Christy Baranowski, CPA | Vice President and CAO

Andrea Schmitz | Marketing Manager

Mark Stowes, MBA | Vice President, Marketing

Jeff Winn | Sales Support Specialist

Care Management Planning Team

Dana Beaver-Lewis, BSN, CPHM | Clinical Product Consultant

Richard Chappe | Senior Vice President

Tina DeWees | Project Manager

Jerry Gray, RN, BSN | Application Specialist/Nurse Planner

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Jeanne Kragie | Manager Customer Relations

Dana Myers, MSW, ACM | Clinical Product Consultant

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Tracy Wyrick, RN, CCM | Application Specialist

Credentialing/Privileging Planning Team

Eric Burpee | Senior Help Desk Analyst

Ellen Chappe | Manager, Data Conversions

Jennifer Green | Project Manager

Terry Griffith | Implementation Manager

Amy Kleist | Senior Consultant

Steve Larsen | Credentialing Support Manager

Annette Martyn |Project Manager

Ron Ross | Associate Vice President

Vicki Searcy | Vice President, Consulting Services

Mark Stowes, MBA | Vice President, Marketing

Brandi Zevenbergen, CPCS | Consultant

Robin Zych, CPCS | Application Specialist/Project Manager

Keynote Speakers

Tony S. Reed, MD, MBA, CPE, FAAFP, FACPE
Senior Medical Director of Quality and Analytics, AtlantiCare
Atlantic City, NJ

Dr. Reed serves as the Chief Medical Information Officer and provides leadership to the medical and financial quality teams. His responsibilities include physician direction for the quality reporting process, coordinating the utilization management team, driving the vision of clinical integration through electronic resources, leading the ICD-10 implementation, and organizational redesign of the provider privileging and performance improvement processes. Dr. Reed received his MD at MCP/Hahnemann School of Medicine, MBA with a concentration in IT Management at Delaware State University and CPE from the American College of Physician Executives. He completed his family medicine residency at The Reading Hospital & Medical Center and sports medicine fellowship at The Ohio State University. Prior experiences include population health management, research in primary care residency redesign and transformation of healthcare through integrated transitions of care. He has been an educator for over a decade.

Joann Sanders, MD, CHCQM, FAIHQ
Chief Quality Officer, Cook Children's Health Care System
Fort Worth, TX

Dr. Sanders is chief quality officer at Cook Children's Medical Center. As part of senior leadership, both administrative and medical staff, Dr. Sanders has been instrumental in development Cook Children's strategic plan and in establishing patient safety initiatives throughout the organization (e.g., establishment of executive patient safety walk rounds; establishment of an audit process utilizing the Global Trigger Tool; development of a Family Advisory Council concept; assuring that patient safety initiatives maintain a high profile before the organization's governing boards, etc.). In this role, she is responsible for clinical quality and operational quality improvement.

Dr. Sanders is a pediatric hematology/oncologist who spends part of her time in the clinical setting. Dr. Sanders is a graduate of the University of Texas, Southwestern Medical School with a fellowship in pediatric hematology/oncology.

Guest Speaker Profiles

Dana Alexander, MSN, MBA, RN, FAAN
Vice President & Practice Leader Clinical Transformation, Divurgent
Denver, CO

Dana Alexander is a nationally recognized nursing leader striving to achieve high performance & accountable healthcare. As Vice President & Practice Leader Clinical Transformation at Divurgent, Dana is engaged to support new models of care through innovation and solutions that provide insight for clinicians to take action. Her current initiatives include developing sound product and solution strategies that reflect not only the drive toward accountable care models and population health, but also influencing regulatory standards and public policy to support the future of healthcare. She actively participates and represents leadership roles in a number of professional organizations such as, HIMSS Board of Director, American Nurses Foundation Board Member, AONE, NQF, MAP Hospital Workgroup & Population Health Taskforce and the ONC Consumer Engagement Workgroup. Ms. Alexander is an accomplished presenter and has authored many publications in the areas of public policy, leadership, population health and analytics.

Michael Callahan, JD
Partner, Katten Muchin Rosenman LLP
Chicago, IL

Mr. Callahan has been a practicing health care attorney for 30 years, assisting hospital and health system clients on a variety of health care legal issues including health care antitrust, HIPAA and regulatory compliance, accreditation matters and general corporate, medical staff credentialing, hospital/medical staff relations, and mergers and acquisitions. Mr. Callahan is recognized for his experience and knowledge of the health care industry. He is a frequent speaker all around the country on topics including medical staff matters, integrated delivery systems, hospital/physician joint ventures, physician recruitment and retention, Joint Commission and HFAP accreditation, Medicare fraud and abuse, HIPAA and Patient Safety Organizations.

Wendy Crimp, BSN, MBA, CPHQ
Consultant, Morrisey Associates
Laguna Beach, CA

Wendy Crimp has provided consulting services to hospitals, health systems, municipal public health agencies, medical groups, payers and universities. Her services have included: development and implementation of both operational and clinical quality improvement programs; management of organizations in transition; interim and long term operations planning; organizational restructure; operations cost management; workflow redesign and optimizing the use of technology. Her clinical, financial and management engineering background assists in successfully bridging the agendas of various organizational stakeholders. Her emphasis is on transitioning clients from planning for change to actual implementation; thus, she is an effective project manager in complex organizational environments. Ms. Crimp is a content expert in the area of clinical quality improvement, credentialing, privileging and peer review.

Sandy McFolling, MSN, RN, ACM
Senior Clinical Advisor, American Case Management Association
Chicago, IL

Sandy McFolling has more than 30 years of health care experience and currently serves as Senior Clinical Advisor for ACMA's National Office. She previously served as System Director of Case Management for Rush University Medical Center and Rush Oak Park Hospital in Chicago. Ms. McFolling has been an active ACMA member since the organization's inception; serving on numerous ACMA committees and previously on the National Board of Directors. She is also a founding board member of the ACMA Illinois Chapter.

Vicki Searcy
Vice President, Consulting Services, Morrisey Associates
Chicago, IL

Ms. Searcy is a nationally recognized credentialing, privileging, accreditation and medical staff quality consultant. In leading Morrisey's Consulting Division, she helps healthcare organizations meet national regulatory requirements, understand their current environments, analyze critical processes, map them against best practices and develop comprehensive plans for realizing measurable results.

Ms. Searcy has more than 25 years' experience working with hospitals, healthcare systems, health plans, medical groups and credentialing verification organizations.

Mark A. Smith, MD, MBA, FACS
Vice President and Chief Medical Officer, Morrisey Associates
Chicago, IL

Dr. Smith brings 25 years of clinical practice and hospital management experiences to his work with physicians and hospitals across the United States. He is a board-certified surgeon. He practiced as a vascular and general surgeon in Palm Springs, California, and currently works part time as a faculty member in the Vascular Surgery Section at the University of California Irvine Medical Center. Dr. Smith's previous positions included president, chief of surgery, chairman of peer review committee, and medical director of cardiac surgery at Desert Regional Medical Center.

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Agenda

Day 1, Wed Aug 19

7:45 - 8:45am	**Registration**
	The conference registration area desk will open at 7:45am in the Grand Ballroom Foyer. Please stop by to pick up your name badge and other conference materials before enjoying your breakfast.
	Breakfast
	Breakfast will be served for conference attendees in Grand Ballroom D-South, you may then take your breakfast into the Grand Ballroom E/F (next door) where the conference welcome will kick off starting at 8:45am.
	Discovery Centers
	In the Grand Ballroom Foyer, Morrisey will have discovery center stations set up where attendees can stop to ask questions, request demonstrations, or grab more information about any of Morrisey's software or consulting solutions.
8:45 - 9:00am	**Announcements and Awards**
	Morrisey Welcome
	Jim Nutter, President, Morrisey Associates
9:00 – 10:15am	**Keynote:** "Adapting to an Accountable World: Tales of Change Management, Transparency, and Performance Improvement"
	Tony Reed, MD, MBA, CPE, FAAFP, FACPE, Senior Medical Director of Quality & Analytics, AtlantiCare
	In this session, we will review the requirements of an organized medical staff in the setting of healthcare reform with increased accountability with an eye towards performance improvement. We will discuss our journey of evolution and change management and describe the path we took to arrive at our current state. We will conclude with our vision of the future, which includes the full suite of Morrisey products.
10:15 - 10:30am	Break
Breakout 1: 10:30am – Noon	**Implementing MSOW (Single Facility): Tips for Success from Lessons Learned**
	Christy Palmer, Provider Business Applications Analyst , Hennepin County Medical Center
	Moderator: Annette Martyn, Project Manager, Morrisey Associates
	The story of Hennepin County Medical Center's MSOW implementation and the lessons they learned along the way. Great session for new MSOW customers.
	Mastering Advanced MSOW/Apogee Workflow Processes
	Neil Berry, Provider Enrollment Lead, Oregon Health and Science University – University Medical Group
	Wanda Stephens, Manager, Call Center Services, Texas Health Resources
	Moderator: Jennifer Green, Project Manager, Morrisey Associates
	Thinking outside the box with MSOW/Apogee workflow processes can help to automate, streamline, and make paperless any number of functions your team facilitates in your organization. In this session you'll learn about how two Morrisey customers are leveraging workflow processes to the maximum.

Expanding Health Networks: Navigating Mergers and Acquisitions

Tony Reed, MD, MBA, CPE, FAAFP, FACPE, Senior Medical Director of Quality & Analytics, AtlantiCare

Renee Dengler, RN, MS, CPMSM, CPCS, Consultant, Morrisey Associates

Moderator: Vicki Searcy, Vice President, Consulting, Morrisey Associates

Panel discussion about navigating the ongoing challenges of hospital and health system mergers and acquisitions from a leadership perspective.

MCCM New Release Part 1

Jeanne Kragie, Manager of Customer Relations - Clinical Systems, Morrisey Associates

Rick Chappe, Senior Vice President, Development, Morrisey Associates

Overview of MCCM new product releases since last year's conference, including new modules, major enhancements and fixes to existing MCCM modules.

Noon - 1:15pm | **Lunch**

Lunch buffet will be served in the Crystal Foyer, dining in the Crystal Ballroom. You may also register to attend networking lunches (note: space is limited).

Discovery Centers

In the Crystal Foyer, Morrisey will have discovery center stations set up where attendees can stop to ask questions, request demonstrations, or grab more information about any of Morrisey's software solutions.

Networking Lunch 1
Time with Your MSOW/Apogee Application Specialists

Adam Miller and George Roa, Application Specialists, Morrisey Associates

Get together with fellow MSOW and Apogee users to network and ask questions of the Morrisey MSOW/Apogee application specialists.

Networking Lunch 2
House Staff Networking

Robin Zych, CPCS, Application Specialist/Project Manager, Morrisey Associates

Gather with fellow users of MSOW's House Staff module (or those that would like to be) to network and share how they are using the module to manage their organization's residency programs.

Networking Lunch 3
Q&A with the Data Conversion Team

Ellen Chappe, Data Conversion Manager and the Data Conversion Team, Morrisey Associates

Meet the Morrisey data conversion team and participate in a relaxed Q&A session.

Networking Lunch 4
Apogee User Networking

Jessie James, Credentialing Supervisor, Aurora Health Care

Annette Martyn, Project Manager, Morrisey Associates

Gather with fellow Apogee users to network and share about using Apogee for provider enrollment, work flow process, payer forms and more.

Networking Lunch 5
Lunch with MCCM Support Team
Dan Bedno, Support Manager – Clinical Systems, and MCCM Support Team, Morrisey Associates
Meet with the MCCM Support Team and understand what they are working on and how they manage and track incoming requests, including bug fixes and enhancements.

1:15 - 1:30pm	Break

Breakout 2:
1:30 - 2:30pm

Evolution of the Practitioner Home Page (PHP) to the new Practitioner Portal
Paul Glick, Senior Vice President and Scott Zoldan, Product Development Manager, Morrisey Associates
Moderator: Vicki Searcy, Vice President, Consulting, Morrisey Associates
Preview of the exciting new changes coming to the Practitioner Home Page (PHP) creating a more intuitive and powerful practitioner data collection tool.

Electronic Provider Enrollment at Synernet Provider Enrollment Services (PES)
Deb Carter, MS, CPMSM, CPCS, Manager, CVO Customer Services and Provider Enrollment and Martin Neff, Data Analyst, Synernet
Moderator: Rick Eskin, Project Manager, Morrisey Associates
Technology is the foundation for improving processes, accessibility of forms and documents as well as tracking and trending critical to the enrollment process. Synernet PES partners with Morrisey in the utilization of MSOW, the Apogee module, Forms Editor and reporting to manage the enrollment process. This will be an interactive discussion of utilizing Morrisey technology and lessons learned.

Weighing your Reporting Options: Practitioner Export, WEBI and Crystal Reports
Robin Zych, CPCS, Application Consultant/Project Manager, Morrisey Associates
Moderator: Ralph Owens, Project Manager, Morrisey Associates
Understanding which tool is right for the job can make all the difference. Learn about all the tools available to MSOW/Apogee users in this session, and what situations are best suited for each.

MCCM New Release Part 2
Jeanne Kragie, Manager of Customer Relations - Clinical Systems, Morrisey Associates
Rick Chappe, Senior Vice President, Development, Morrisey Associates
Overview of MCCM new product releases since last year's conference, including new modules, major enhancements and fixes to existing MCCM modules.

2:30 - 2:45pm	Break

Breakout 3:
2:45 – 3:45pm

Development Update, including Enterprise Solutions for Credentialing and Privileging
Rob Zoldan, Senior Vice President, Paul Glick, Senior Vice President and Scott Zoldan, Product Development Manager, Morrisey Associates
Moderator: Vicki Searcy, Vice President, Consulting Services, Morrisey Associates
Morrisey development team will overview the latest updates to MSOW/Apogee, including an exciting new endeavor to allow MSOW customer manage their practitioners in an enterprise environment. This will include changes to Privilege Content and Criteria Builder (PCCB), Administrative Review Module (ARM) and e/Delineate privileging.

MSOW/Apogee Application Administration Best Practices for your Ever-growing Health System

Chip Petersen, CPMSM, CPCS, Manager, Physician Services and Len Phipps, ITS Manager, Trinity Health

Melissa Walters, MHA, CPMSM, CPCS, MSOW-C, Senior Director, Centralized Credentialing, The Johns Hopkins Hospital and Health System

Candace Gwizdalski, RN, BSN, MA, CPMSM, CPCS, Supervisor, Data Management & Quality and Eric Haugen, CPCS, Data Analyst, Advocate Health Care

Moderator: Brandi Zevenbergen, CPCS, Account Executive, Morrisey Associates

Managing application administration to a growing organization's user base can be a challenge. What are the best practices for security set up, handling upgrades, setting up an internal help desk, etc.? Panel members will share their stories of how they have evolved their own best practices in their health systems.

Getting Acquainted with MSOW/Apogee for New Users

George Roa, Application Specialist, Morrisey Associates

Moderator: Adam Miller, Application Specialist, Morrisey Associates

Learning session for new users to MSOW and Apogee. Master the basics of navigation, data entry and other system basics to get started on the right foot.

MCCM: Keys to a Successful Implementation

Nicole Garabedian, RN, MSN, Manager, Integrated Care Department, Lawrence General Hospital

Moderator: Mandy Sands, PMP, Project Manager, Morrisey Associates

Lawrence General is a large community hospital northwest of Boston. They recently completed implementation of the MCCM case management system, and have plans to roll-out more modules. Nicole Garabedian will discuss the MCCM implementation project and how she and her team have worked to ensure a successful roll-out of the system.

Readmission Risk Assessment: Customer Case Study

Susan Irick, MS, RN, ACNP-C, Disease Manager Pneumonia & Sepsis, Northeast Georgia Medical Center

Mark Westbrook, Account Executive and Mark Smith, MD, MBA, FACS, Vice President and Chief Medical Officer, Morrisey Associates

Moderator: Dana Beaver-Lewis, BSN, CPHM, Clinical Product Consultant, Morrisey Associates

Morrisey recently completed a project working with Northeast Georgia Medical Center to analyze patient data related to its pneumonia population. NEG completes patient risk assessments on this population and wanted to know if their assessment responses and scores are statistically significant in terms of predicting a patient's risk of readmission. The results of this study will be presented during this session.

The Ever-changing Journey: Using an Electronic Case Management Tool to Measure Key Outcomes
Sarah Clark, RN-BC, BSN, MHA/INF, CCM, Manager, Care Coordination Education, Sentara Healthcare
Moderator: Dana Myers, MSW, ACM, Clinical Product Consultant, Morrisey Associates
Sentara HealthCare redesigned its Care Coordination department to support a more patient-centered model, including adding a centralized resource management center and, most recently, a hospitalist team approach. The addition of MCCM to automate its processes has resulted in data collection that is a by-product of documentation and not a separate chore. From utilization review to transition planning, the use of data collected during the documentation process has enabled the team to adapt its program quickly in response to changing needs and outcomes.

3:45 - 4:00pm	Break

Breakout 4: 4:00 – 5:00pm	**MSOW Enhancement Suggestions Forum**

Rob Zoldan, Senior Vice President, Terry Griffith, Implementation Manager and Steve Larsen, Support Manager – Credentialing Systems, Morrisey Associates
Moderator: Robin Zych, CPCS, Application Specialist/Project Manager, Morrisey Associates
Open forum for MSOW users to request and discuss enhancements with the MSOW development, implementation, and support teams.

Standardization with Morrisey Consulting Services – Applications, Workflow and Data
Vicki Searcy, Vice President, Consulting, Amy Kleist, Senior Consultant, Meghan Kurtz, Consultant, Morrisey Associates
Members of the Morrisey consulting services team will outline the process used when working through a standardization project with a consulting customer. They will cover the guidelines around reviewing and optimizing applications, workflow and data management.

The Expanding Role of the Advanced Practice Provider: Are Your Privilege Forms Keeping Up?
Vivienne Smith, MS, RN, Administrator, Medical Staff Informatics, University of Colorado Hospital
Moderator: Deborah Beierle, CPCS, Director of Sales, Morrisey Associates
In today's complex healthcare world, Advanced Practice Providers are expanding their practice in every specialty and clinical setting. We became increasingly aware that our department-specific privilege forms were not keeping up with actual practice. In addition to lack of nomenclature, we were finding that privileged procedures in one department were also being performed in others, but those privileges were not always on each PCCB form. Instead of chasing endless updates, we took a more innovative approach and found even more value than expected in our new consolidated privilege forms. The presentation will outline our dilemma, process and ultimate solution.

Case Management Rapid Roundtable: Two-Midnight Rule, ED Management and Observation Status
MaryBeth Bednarz, RN, BSN, CCDS, ACM, CPUM, Director, Care Management and Alison Tieman, Manager RN Care Management, Charlotte Hungerford Hospital
Moderator: Glenn Bowman, PMP, Account Executive, Morrisey Associates
The Charlotte Hungerford Hospital implemented MCCM back in 2007. They are experienced users of the system and will present how they automate reviews related to the Medicare Two-Midnight Rule and ED level-of-care determinations, including observation and inpatient admission determinations.

Quality Advisory Board Update and Plans
Rick Chappe, Senior Vice President, Mark Stowes, MBA, Vice President Marketing and Jeff Joo, Vice President Sales, Morrisey Associates
Morrisey will present the status of the MCCM Quality Advisory Board, including major systems enhancements that have been developed to date and future plans.

MCCM Fundamentals of Application Administration: Overview and Refresher
Jerry Gray, RN, BSN and Kevin Crafton, Application Specialists, Morrisey Associates
Morrisey's implementation team will present an overview of key application administration activities required to keep the system working smoothly and consistently.

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Day 2, Thu Aug 20

7:15 – 8:15am   **Breakfast**
Breakfast will be served for conference attendees in Grand Ballroom D-South, you may then take your breakfast into the Grand Ballroom E/F (next door).

7:30 – 8:00am   **Breakfast with the CEO**
Gerald Zoldan, CEO, Morrisey Associates
An open and informal Q&A session with Morrisey's CEO. Questions can be submitted early through your online conference registration, or onsite at the registration desk on Day 1 of the conference.

8:00 - 8:15am   **Announcements and Innovative Solutions Awards**

8:15 – 9:15am   **Keynote: "Information Technology: Tool vs. End Point"**
Joann Sanders, MD, CHCQM, FAIHQ, Chief Quality Officer, Cook Children's Health Care System
Keynote speaker Joann Sanders, MD, CHCQM, FAIHQ, chief quality officer at Cook Children's Health Care System in Fort Worth, Texas, will discuss her organization's strategic vision and future plans and how Morrisey fits into the equation. She will also discuss healthcare reform, quality and patient safety, and how healthcare has evolved from focusing on acute care to population health management.

9:15 – 9:30am   Break

Breakout 1:
9:30 – 10:45am   **Building a CVO with MSOW and Morrisey Consulting**
Karen Crotinger, MS, CPMSM, CPCS, Director, CVO, Allina Health
Brandi Zevenbergen, CPCS, Account Executive, Morrisey Associates
A thorough well thought process of envisioning, planning, creating and staffing a Centralized Verification Organization (CVO) is the key to success. Learn how Allina Health fully leveraged Morrisey Consulting Services in the creation of their CVO as well as their rollout of MSOW in their CVO.

Transitioning Your Privilege Forms to Privilege Content and Criteria Builder (PCCB) Content
Wendy Crimp, BSN, MBA, CPHQ, Consultant, Morrisey Associates
Moderator: Amy Kleist, Senior Consultant, Morrisey Associates
Wendy Crimp will outline the steps involved in fully transitioning your existing privilege forms over to Morrisey's PCCB privilege and criteria content. With a well-planned process PCCB subscribers can truly leverage the best practice content that PCCB offers and provide a pathway to keeping your privilege forms up-to-date for the long run.

MSOW/Apogee Reporting Panel: Share and Learn
Michael Carlson, Systems Analyst, Providence Alaska
Christy Palmer, Provider Business Applications Analyst, Hennepin County Medical Center
Martin Neff, Data Analyst, Synernet
Moderator: Robin Zych, CPCS, Application Specialist/Project Manager, Morrisey Associates
Panel members will share their favorite reports, describing how they are used and distributed in their organization as well as an "under the covers" look into how the report is written.

MPPR version 2.0 Product Overview and Development Status
Mark Smith, MD, MBA, FACS, Vice President and Chief Medical Officer and Scott Zoldan, Product Development Manager, Morrisey Associates
Moderator: Sarah Cassidy, Business Development Manager, Morrisey Associates
This session includes an overview and demonstration of the new MPPR system. Morrisey will demonstrate MPPR's specialty-specific indicator content and reports. We will also demonstrate the new MPPR dashboard available in Version 2.0.

Best Practices: Pediatric Population Health Management including High Risk Social Work Program, Complex Care Management and Homeless Outreach Program
Misty VanCampen, RN, BSN, CCM, Care Coordination Case Manager and Margie Dorman-O'Donnell, RN, MSN, Director, Case Management, Cook Children's Health Care System
Moderator: John Stanik, Clinical Product Consultant, Morrisey Associates
Cook Children's Health System is a recognized leader in providing pediatric care management. The case management team has implemented a variety of community outreach programs to keep its patients and families healthy and connected. During this session, the Cook team will present several of its most successful programs.

Best Practices: Patient Care Transitions
Tracy Wyrick, RN, CCM, Application Specialist, Morrisey Associates
Caroline Habbert Romash, MBA, Director of Care Management, Mt. Sinai Medical Center
Moderator: Tina DeWees, Project Manager, Morrisey Associates
Transitions of Care is the newest addition to the MCCM product family. Tracy Wyrick, Morrisey application specialist, is busy managing multiple concurrent implementations of this new system. She will present key enhancements to the system and provide an overview of the implementation projects.

New MCCM Quality Module, Phase 1 – New Work List, Enhanced Additional Data Answers (ADAs) and New Data Collection Wizard
Dana Beaver-Lewis, BSN, CPHM and Dana Myers, MSW, ACM, Clinical Product Consultants, Morrisey Associates
Moderator: Bob Sands, Application Specialist, Morrisey Associates
Morrisey's clinical product consultants will demonstrate the key new functionality of Phase I of the MCCM Quality Module redevelopment project, including the new Quality Work List, Data Collection Wizard, and a major overhaul to additional data questions and answers. This new functionality is all available in MCCM Release 3.2.

10:45 – 11:00am	Break

Breakout 2: 11:00am – Noon

Standardization of Data in a Non-Centralized Environment
Dee Winter, LPN, Six Sigma Black Belt, CPHQ, MSOW-C, Morrisey/MSOW/Apogee Quality Control Analyst, Adventist Health System
Moderator: Annette Martyn, Project Manager, Morrisey Associates
Managing varying processes within multiple entities can certainly be a challenge. During this session you will learn how Adventist Health System (AHS) has approached this challenge through the development of a guideline process used to facilitate standards for the Medical Staff Offices, Medical Groups and Physician-Hospital Organizations. They will also cover how they developed a way to track, monitor and report to the entities' upper-level management through the use of scorecards.

MSOW/Apogee Masters Q&A

Adam Miller, Application Specialist, Morrisey Associates

Moderator: George Roa, Application Specialist, Morrisey Associates

This session is intended for seasoned MSOW users to submit questions to our application specialists about how to really leverage MSOW and fully utilize all the available functionality. Questions will be requested prior to the conference so that the presentation can be built around the information attendees want to know.

Morrisey Practitioner Performance Reporting (MPPR) - Customer Experience

Cindy Guess, RN, Director of Quality/Accreditation and Joann Sanders, MD, CHCQM, FAIHQ, Chief Quality Officer, Cook Children's Health Care System

Moderator: Sarah Cassidy, MPPR Business Development Manager, Morrisey Associates

Cook Children's Medical Center was an active member of the MPPR customer advisory board and one of the key beta test sites. Members of the Cook team will discuss their experience with MPPR and how they prepared their organization and physician leaders to adopt the new system.

The Pillars of Population Health Care Management

Dana Alexander, MSN, MBA, RN, FAAN, Vice President & Practice Leader Clinical Transformation, Divurgent

Moderator: Mark Stowes, MBA, Vice President Marketing, Morrisey Associates

This session will focus on the history of population health management and how to build a program for success, including: stratification of patient populations to identify high risk patients, building an effective care coordination department, ensuring patient wellness and engagement and implementing data analytics for ongoing monitoring and assessment.

Care Transitions and Building Effective Post-Acute Care (PAC) Partnerships

Tracy Wyrick, RN, CCM, Application Specialist, Morrisey Associates

Angela Crane, Lead Clinical Liaison, Signature Healthcare

Melissa Highley, BSN, Business Partnership Director – Post-Acute, Signature HealthCare

Moderator: Dana Beaver-Lewis, BSN, CPHM, Clinical Product Consultant, Morrisey Associates

Post-acute care provider partners are key to the success of any acute care hospital. During this session, Morrisey will team with representatives from a major post-acute care provider to demonstrate how they partner with a Morrisey healthcare system customer to ensure safe, effective care transitions to improve patient outcomes and reduce the risk of readmissions.

Best Practices: Integrating MCCM into the Revenue Cycle, including Payor Authorizations and Denials

Maria Antonucci, MS, RN, Director, Care Management and Christy Winans, RN, BSN, Utilization Management Specialist, All Children's Health System

Moderator: Mandy Sands, PMP, Project Manager, Morrisey Associates

The case management team at All Children's Hospital in St. Petersburg, FL will demonstrate the program it has developed to share information with its patient financial services department. The program includes effective work flows used to manage payor authorizations and denials. Both teams document and communicate using MCCM.

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Noon – 1:00pm	**Lunch**
	Lunch buffet will be served in the Crystal Foyer, dining in the Crystal Ballroom. You may also register to attend networking lunches (note: space is limited).

Discovery Centers
In the Crystal Foyer, Morrisey will have discovery center stations set up where attendees can stop to ask questions, request demonstrations, or grab more information about any of Morrisey's software solutions.

Networking Lunch 1
CPCS & CPMSM Certification Exam Networking
Moderator: Brandi Zevenbergen, CPCS, Account Executive, Morrisey Associates
Networking lunch for those who are planning to sit for the CPCS or CPMSM exams soon. Recently certified individuals are welcome to join as well to help guide those entering into the process.

Networking Lunch 2
Lunch with the Morrisey Credentialing Help Desk Team
Moderators: Steve Larsen, Support Manager – Credentialing Systems, Morrisey Associates and Team
Meet the team behind the Morrisey credentialing help desk, and learn a few tips along the way.

Networking Lunch 3
Time with Your MSOW/Apogee Application Specialists
Moderators: Adam Miller and George Roa, Application Specialists, Morrisey Associates
Get together with fellow MSOW and Apogee users to network and ask questions of the Morrisey MSOW/Apogee application specialists.

Networking Lunch 4
Care Transitions and Population Health Management Models and Experiences
Moderators: Dana Beaver-Lewis, BSN, CPHM and Dana Myers, MSW, ACM, Clinical Product Consultants, Morrisey Associates
Population health management is a major focus of healthcare reform. Healthcare providers are struggling to devlop partnerships and programs to manage high-risk patients and families. During this session, we encourage our customers to share their plans and successes in this area.

Networking Lunch 5
Discharge Planning and Financial Exports
Moderators: Rick Chappe, Senior Vice President and Glenn Bowman, PMP, Account Executive, Morrisey Associates
Morrisey encourages its customers to develop two-way integration between MCCM and their clinical and financial systems. During this session, Morrisey will describe options to automatically export discharge planning and payor authorization details to hospital EMRs and financial systems. Morrisey customers will be encouraged to share their experiences in these areas.

1:00 - 1:15pm	Break

Breakout 3: 1:15 – 2:30pm	**Apogee Enhancement Suggestions Forum** Rob Zoldan, Senior Vice President, Terry Griffith, Implementation Manger, Steve Larsen, Support Manager – Credentialing Systems, Morrisey Associates Moderator: Robin Zych, CPCS, Application Specialist/Project Manager, Morrisey Associates *This session will be an open forum for Apogee users to provide feedback and enhancement requests to Morrisey.*

Efficient Credentialing and Privileging Decision Making in a Healthcare Network
Vicki Searcy, Vice President, Consulting, Renee Dengler, Consultant, Morrisey Associates
Michael Callahan, JD, Partner, Katten Muchin Rosenman
This session will present methods for speeding up your credentialing approval to drive efficiency in the credentialing process. With valuable insight from experts in the field, take home actionable ideas on how to improve your organization's decision making process.

Implementing MSOW (Multi-Facility): Tips for Success from Lessons Learned
Karen Crotinger, MS, CPMSM, CPCS, Director, CVO, Adi McCarthy, MPNA, CPCS, CPMSM, Credentialing Data Supervisor, Allina Health
Moderator: Brandi Zevenbergen, CPCS, Account Executive, Morrisey Associates
The story of Allina Health's multi-facility MSOW implementation and the lessons they learned along the way. Great session for new MSOW users.

Best Practices in Pediatric Care Management
Jennifer Miller, Clinical Systems Analyst, Children's Hospitals and Clinics of Minnesota
Moderator: Mandy Sands, Project Manager, Morrisey Associates
Children's Hospitals and Clinics of Minnesota recently completed roll-out of MCCM at its facilities. Jen Miller will share how they are using MCCM to automate their case management workflows and also share some tips and tricks for effective system configuration.

Best Practices: Quality Monitoring and Process Improvement
Linette Owen, RN, MS, Outcomes Coordinator, Northeast Georgia Medical Center
Moderator: Mark Westbrook, Account Executive, Morrisey Associates
Linette Owen has worked in the Process Improvement department at Northeast Georgia Medical Center for many years. She will share how they automate their PI program using MCCM. She will also demonstrate reports they have developed to communicate results, including practitioner performance-related reports.

Crystal Reports: Getting Under the Covers – Formulas, Complex Queries and Maximizing Efficiency
Lori Melberg, CPHQ, Quality and Performance Improvement Data Analyst, Hennepin County Medical Center
Jeanette Loza, MCCM Help Desk Analyst, Paula Harper, RN, BSN, MSMOB, NHA, Application Specialist and Kevin Crafton, Application Specialist, Morrisey Associates
This session will be presented by four speakers. Each presenter is skilled at developing complex Crystal Reports. Each will present a report and share tips and tricks related to writing effective, complex Crystal Reports.

2:30 – 2:45pm	Break

Breakout 4:
2:45 – 3:45pm

Think "Lean" to Eliminate Waste and Gain Efficiency in Centralized Credentialing
Melissa Walters, MHA, CPMSM, CPCS, MSOW-C, Senior Director, Centralized Credentialing, The Johns Hopkins Hospital and Health System
Jan Rein, RN, CPMSM, Director, Medical Staff Services, Sibley Memorial Hospital
Moderator: Cathy Gardsmith, CPMSM, Director of Sales, Morrisey Associates

Lean Six Sigma represents a management approach for driving innovating processes inside an organization in order to achieve superior results. It involves a practical analysis based on facts to increase efficiency of workflow process while at the same time aiming towards innovation and growth. It is a long-term process of gradual and continuous improvement. When applied in a Central Credentialing environment the key achievement is the best quality, at the lowest cost, while decreasing application turnaround times and eliminating the duplication and waste in the credentialing process.

MSOW/Apogee Integration, Single Facility: Considerations, Choices and Consequences
Bob DeMayo, Assistant Director, Medical Staff Office and Kathleen Pollitt, Manager, Provider Enrollment, Boston Medical Center
Moderator: Rick Eskin, Project Manager, Morrisey Associates

During this session the team from Boston Medical Center will provide an overview of the planning, design and implementation of Apogee to their exiting MSOW installation. Their goal in this project was to combine Provider Enrollment with Medical Staff Office functionality.

Peer Review Manager – Simplifying Joint Commission Mandated Reviews of Staff Physicians & Hospital-Based Professional Practice
Lee Hughes, Medical Review Analyst, Quality Improvement, Woman's Hospital of Baton Rouge
Moderator: Amy Kleist, Senior Consultant, Morrisey Associates

Ongoing professional practice review might be mandatory but it can be a lot easier and a lot more convenient when it's done electronically. This session will provide an overview of implementing and using the Peer Review Manager (PRM) module to conduct clinical practice reviews and identify problematic areas that could potentially impact quality of care.

Pediatric Readmission Management
Misty VanCampen, RN, BSN, CCM, Care Coordination Case Manager and Margie Dorman-O'Donnell, RN, MSN, Director, Case Management, Cook Children's Health Care System
Moderator: Dana Beaver-Lewis, BSN, CPHM, Clinical Product Consultant, Morrisey Associates

This session will focus on risk assessing pediatric patients as they enter the emergency department. It will cover how to use MCCM to capture required information to determine a risk score and to document needed interventions and follow-up activities.

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Using Patient Care Conferences to Avoid Readmissions and Resolve Delays
Sandy McFolling, MS, RN, ACM, Senior Clinical Advisor, American Case Management Association
Moderator: Mark Stowes, Vice President, Marketing, Morrisey Associates
Sandy McFolling has been instrumental in the development of the ACMA CompareAD, RA and DM systems. She has recently joined the ACMA and will present an effective care management approach to working in collaboration with a patient's clinical team to effectively manage at risk patients while minimizing barriers to care progression.

3:45 – 4:00pm   **Break**

Breakout 5:   **Partnering with Risk Management: Risk Assessment in the Credentialing Process**
4:00 – 5:00 pm   Mary O'Grady, MSN, RN, Administrator, Risk Management and Candace C. Gwizdalski, RN, BSN, MA, CPMSM, CPCS, Supervisor, Data Management & Quality, Advocate Healthcare
Moderator: Annette Martyn, Project Manager, Morrisey Associates
Discover how Advocate Health Care's Center for Practitioner Information partners with Risk Management in assessing provider liability experience and incorporating the information into the credentialing process. The presenters will share examples of MSOW Report Card data, criteria for evaluation, risk assessment content, the process for review, and how the assessment is communicated to the credentialing sites for consideration in decision-making.

Practical Advice about Using MSOW for Your Joint Commission Survey
Eon Stephens, CPCS, Credentials Coordinator and Nancy J. Miller, MHSA, CPMSM, CHC, Department Director, Medical Staff Office, Suburban Hospital - Johns Hopkins Health System
Moderator: Jennifer Green, Project Manager, Morrisey Associates
After a recent Joint Commission surveys for Suburban Hospital and Suburban Outpatient Surgery Center, the MSOW users completely wowed their physician surveyor by using MSOW to display their files electronically. This session will be full of practical advice and the presenters will share how to navigate the system to display your files electronically and never print another hard copy file again for a survey. Scanning documents, using web crawls, and leveraging the blue buttons to appropriately present the requested documents and privileging will all be covered. Learn what the surveyors were focused on and what fascinated them about the robust MSOW software and its capabilities.

Designing a Paperless Central Credentialing Process with MSOW
Beth Thornton, Director, Central Credentials Service, Alexian Brothers Health System – AMITA Health
Moderator: Amy Kleist, Senior Consultant, Morrisey Associates
This session will walk you through the entire spectrum of creating a paperless credentialing process using MSOW. We will cover the thought process behind this decision, identify the tools you will need, discuss set up, show you how to build the workflow, how to send verification letters and how to manage responses without printing anything! We'll also discuss how you can share information with your leadership about how much time and money you are saving along with how to track improvements with response time.

PSO Update and MCCM Risk Management Demonstration, Including the new PSO Module

Michael Callahan, JD, Partner, Katten Muchin Rosenman

Dana Beaver-Lewis, BSN, CPHM, Clinical Product Consultant and John Kandris, Manager, Business Analytics Services, Morrisey Associates

Moderator: Mark Stowes, MBA, Vice President, Marketing, Morrisey Associates

Michael Callahan will begin this session with a definition and overview of Patient Safety Organizations (PSOs). He will review current cases setting new legal precedents regarding discoverability of patient safety work product. Dana Beaver-Lewis, Morrisey clinical product consultant will demonstrate how to use MCCM's Risk Management module to capture and track incident reports, including the new PSO module that enables you to report cases to your PSO.

Thinking Outside the Box: Using MCCM for Concierge Service Support and Other Creative Solutions

Greg Borden, RN, BS/EB, Senior System Analyst, Sarasota Memorial Hospital

Moderator: Dana Myers, MSW, ACM, Manager, Business Analytics Services, Morrisey Associates

Greg Borden is one of the most experienced users of MCCM. Over the years, Greg has developed new uses for the system to help automate workflows beyond the normal boundaries of case and quality management. He will share several of the programs that he has automated using MCCM.

Establishing Corporate Standards for Best Practice Case Management/Business Office Workflows in a Multi-hospital System

Teresa Riehle, RN, BSN, MBA, ACM, Regional Director of Case Management, Division 1 and Susan Muchler, RN, MSN, MBA, FACHE, Project Manager and Tanya Sanderson, RN, BSN, MBA, RCIS, CLNC, Operations Director, Denials and Appeals, Community Health Systems (CHS)

Kevin Crafton, Application Specialist, Morrisey Associates

Moderator: Glenn Bowman, PMP, Account Executive, Morrisey Associates

With over 100 hospitals using the system, Community Health System is the largest MCCM customer. During this session, the CHS team will share how they developed standard workflows to ensure consistent, quality data collection to foster effective integration with the business office.

Ask Your MCCM Application Specialists

Bob Sands, Jerry Gray, RN, BSN and Countess Hope, RN, BSN, ACM, Application Specialists, Morrisey Associates

During this session a panel of Morrisey's MCCM application specialists will take questions from the group about MCCM functionality such as work lists, rules, data/codes, etc.

6:30 – 10:00pm   **Conference Dinner and Awards – *Location TBD***

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Day 3, Fri Aug 21

7:45 – 8:30am **Breakfast**
Breakfast will be served for conference attendees in Grand Ballroom D-South, you may then take your breakfast into the Grand Ballroom E/F (next door).

Credentialing/Privileging		Care Management	
8:30 – 9:15am	**Mastering the Forms Editor** Peggy Feeney, Forms Developer, Morrisey Associates Kristine Collins, MSOW Administration Specialist, Cadence Health *Morrisey's forms developer will team up with an MSOW user who has mastered using the editor for her organization's forms needs. Together they will overview and demonstrate how the tool is used.* **Credentialing Help Desk Q&A** Eric Burpee, Senior Help Desk Analyst, Morrisey Associates *Open forum to ask the credentialing help desk all your MSOW questions.*	8:30 – 10:30am	**MCCM Enhancement Round Table** Jeanne Kragie, Manager of Customer Relations - Clinical Systems, Rick Chappe, Senior Vice President, Development, Morrisey Associates *Open forum for MCCM users to hear about Morrisey's development plans and to discuss and request specific enhancements to the system.*
9:15 – 9:30am	Break	10:30 – 11:30am	**MCCM Reporting Round Table** John Kandris, Manager, Business Analytics, Morrisey Associates *John Kandris, Morrisey's Manager of Business Analytics, will overview Morrisey's plans to improve the MCCM reporting environment, including new tools and options for data analysis, ad hoc reporting, and plans for predictive analytics. This session will be interactive, so come prepared to share your thoughts.*
9:30 – 10:15am	**Privilege Content and Criteria Builder (PCCB)** Vicki Searcy, Vice President, Consulting Services, Morrisey Associates *Learn more about using PCCB to create and manage single and multi-facility privilege forms.* **Webi – When to Use it vs. Crystal Reports** Kristine Collins, MSOW Administration Specialist, Cadence Health Moderator: Jennifer Green, Project Manager, Morrisey Associates *We all know that Crystal Reports is the powerhouse of the reporting world. But sometimes you need a simple report quickly and easily and then Webi is the place to go! This session will cover a high level overview of Webi and when to use it.*		
10:15 – 10:30am	Break		
10:30 – 11:15am	**Data Conversion Q&A** Ellen Chappe, Data Conversion Manager, Morrisey Associates *Open forum to ask our data conversion team any questions you may have about the MSOW database.*		