

M · O · R · R · I · S · E · Y[®]

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2016 Morrisey Technology and Educational Conference

August 17-19, 2016 | The Hyatt Regency Chicago

Registration Information

Register online [here](#).

Hotel Accomodations

Group Rate: \$204/night (single/double)

- Rate will remain until block is full or **July 22**, whichever comes first
 - [Book online](#) or by phone, (888) 421-1442 and mention the **Morrissey Conference**
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Full Meeting (Aug 17-19)

Early Bird Registration - \$600
(Registration and payment must be received before July 15, 2016)

Standard Registration - \$700
(Registrations received after July 15, 2016, payment must be received by August 5, 2016)

One-Day Registration - \$450
(Payment must be received by August 5, 2016)

**Pre-Conference
(Aug 15-16)**
MSOW Advanced Crystal Reports - \$750
MSOW New Hire Training - \$750
MSOW Certification Exam (8/16) - \$75

Registration Payment Options:

- **Credit Card** (via [online registration](#))
- **Check**
 - Please make check payable to **Morrissey Associates** (for MSOW/Apogee customers) or **MorCare, LLC** (for MCCM, MPPR customers) and mail it with a copy of your registration confirmation email to:

**Morrissey
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 final. No refunds or transfers will be provided.

2016 Morrisey Technology and Educational Conference

AUGUST 15 • MONDAY

9:00am – 4:00pm	[PRECONFERENCE, MUST ADD DURING REGISTRATION] - MSOW Advanced Crystal Reports Training <i>Staff: Robin Zych, MHS, CPCS, MSOW-C</i>	Morrisey Training Room (222 S. Riverside Plaza, Suite 1850, Chicago, IL 60606)
9:00am – 4:00pm	[PRECONFERENCE, MUST ADD DURING REGISTRATION] - MSOW New Hire Training <i>Staff: Andrea Vasata</i>	Northwestern Memorial Hospital - Training Room 987 (541 N. Fairbanks, 9th Floor)

2016 Morrisey Technology and Educational Conference

AUGUST 16 • TUESDAY

9:00am – 4:00pm	[PRECONFERENCE, MUST ADD DURING REGISTRATION] - MSOW Advanced Crystal Reports Training <i>Staff: Robin Zych, MHS, CPCS, MSOW-C</i>	Morrisey Training Room (222 S. Riverside Plaza, Suite 1850, Chicago, IL 60606)
9:00am – 4:00pm	[PRECONFERENCE, MUST ADD DURING REGISTRATION] - MSOW New Hire Training <i>Staff: Andrea Vasata</i>	Northwestern Memorial Hospital - Training Room 987 (541 N. Fairbanks, 9th Floor)
2:00pm – 4:00pm	[PRECONFERENCE, MUST ADD DURING REGISTRATION] - MSOW Certification Exam <i>Staff: Vanessa Valdovinos</i>	Picasso
6:00pm – 6:45pm	*NEW* Early Registration/Check-in <i>Staff: Andrea Schmitz</i>	Crystal Foyer (Hyatt Regency Chicago - West Tower)

2016 Morrisey Technology and Educational Conference

C Care Management through the Continuum **R** Credentialing and Privileging Management **G** General Interest **M** Meal

Q Quality and Performance Management

AUGUST 17 • WEDNESDAY

7:45am – 8:30am	Discovery Centers - All Solutions <i>Staff: Valorie Hoflack, John Stanik, RN, BSN</i> Discovery Centers are available for attendees to ask questions about or see a live demonstration of all enterprise software solutions.	Crystal Foyer (Hyatt Regency Chicago - West Tower)
7:45am – 8:30am	Registration Check-in <i>Staff: Andrea Schmitz</i>	Crystal Foyer (Hyatt Regency Chicago - West Tower)
7:45am – 8:30am	M Breakfast Breakfast will be served buffet-style in the Crystal Foyer. Please prepare your meal and take it to Crystal B/C to eat and be seated for the keynote session.	Crystal Foyer (Hyatt Regency Chicago - West Tower)
8:30am – 9:00am	G Conference Welcome <i>Staff: Jim Nutter, Michael Sousa, Jerry Zoldan</i>	Crystal Ballroom
9:00am – 10:15am	G [Keynote] - Clinical Performance Management Systems: Building Strategic Value for the High-Performing Health System <i>Moderators: Mark Smith, MD, MBA, FACS</i> <i>Speakers: Manoj Pawar, MD</i> The current healthcare landscape presents significant challenges for health systems. In order to capitalize on opportunities to thrive in this competitive environment, systems must be able to compete through creating greater value. Incorporating examples from the Catholic Health Initiatives journey, Dr. Pawar shares the critical role that successfully managing clinical performance in a health system can play toward increasing growth, engagement, development of high-performing networks, and establishing a clinical value proposition.	Crystal Ballroom
10:15am – 10:30am	Break	
10:30am – 12:00pm	C MorCare New Release Overview - Part 1 <i>Moderators: Tina DeWees</i> <i>Staff: Rick Chappe, Jeanne Kragie, John Stanik, RN, BSN</i> Overview of new product releases since last year's conference, including new modules, major enhancements and fixes. NOTE: There are no handouts for this session.	Gold Coast (Hyatt Regency Chicago - West Tower, Bronze Level)
10:30am – 12:00pm	R MSOW version 3.0 Release Overview and Development Update <i>Moderators: Robin Zych, MHS, CPCS, MSOW-C</i> <i>Staff: Paul Glick, Rob Zoldan</i> Morrisey development team leadership will provide an overview of the new features and enhancements included in MSOW version 3.0. This will include an overview of the new Practitioner Portal, enterprise PCCB forms and the updated Administrative Review Module. Subsequent deep-dive breakout sessions are scheduled later in the conference to provide detail in each of these three key enhancement areas for those who would like more than an overview. <ul style="list-style-type: none">• How to Transition from the MSOW Practitioner Home Page (PHP) to the new Practitioner Portal• Transitioning to Enterprise Privilege Content and Criteria Builder (PCCB) Forms and the Conditions Manager• Transition to the MSOW 3.0 Administrative Review Module (ARM) for Health Systems	Crystal B/C (Hyatt Regency Chicago - West Tower)
10:30am – 12:00pm	R To Privilege or Not to Privilege...THAT is the Question <i>Moderators: Jackie Jones, CPMSM</i> <i>Speakers: Wendy Crimp, BSN, MBA, CPHQ</i> Privileging is one of the most difficult methods for authorizing clinical practice and it should only be used when necessary. This session is targeted at assisting organizations with the dilemma of determining when privileging is required and when it is not. Frequently organizations have to evaluate whether privileges are required to authorize performance of specific clinical services or to permit clinical practice for specific practitioner types. This session explores how to investigate and resolve these questions. The session will include methods for determining whether a particular clinical service rises to the level of being a "medical act". The speaker will also demonstrate how to perform	Crystal A (Hyatt Regency Chicago - West Tower)

a cross walk of State/Federal/accreditation requirements; society positions; and community standards in arriving at a decision regarding whether privileging is necessary for a specific clinical service. (Specific examples will be reviewed.)

10:30am – 12:00pm	Q Elements of a Successful MorCare Performance Management Implementation	Water Tower (Hyatt Regency Chicago - West Tower, Bronze Level)
	<i>Moderators: Sarah Cassidy</i>	
	<i>Staff: Linda Chappell, CPMSM, MHA, FACHE, Guna Deivendran, Jacob Zych</i>	
	Overview of the components of a successful Performance Management implementation.	
	<ul style="list-style-type: none">• Client resource commitments (including the need for a clinical/physician champion)• Getting the data from point A to point B and the transformation of data to information (data mapping process)• Connecting with physicians toward a data acceptance culture (data validation process)• Attribution considerations and the importance of an attribution policy• Product updates	
12:00pm – 1:00pm	Discovery Centers - All Solutions	Crystal Foyer (Hyatt Regency Chicago - West Tower)
	<i>Staff: Bob Sands, Andrea Vasata</i>	
	Discovery Centers are available for attendees to ask questions about or see a live demonstration of all of our enterprise software solutions.	
12:00pm – 1:00pm	M Lunch - General Seating	Crystal B/C (Hyatt Regency Chicago - West Tower)
	Lunch will be served buffet-style in the Crystal Foyer. Please prepare your meal and take it to Crystal B/C to eat.	
12:00pm – 1:00pm	M [Optional Networking Lunch] - CPCS/CPMSM Preparation Group	Soldier Field (Hyatt Regency Chicago - West Tower, Bronze Level)
	<i>Moderators: Robin Zych, MHS, CPCS, MSOW-C</i>	
	<i>Speakers: Patricia E Brown, Diane Landahl, CPCS</i>	
	Sitting for the NAMSS CPCS or CPMSM exams in the near future? Have you recently become certified? Network with fellow medical staff professionals to discuss the exam, share study tips, and learn.	
12:00pm – 1:00pm	M [Optional Networking Lunch] - Health System Centralized Verification Organization (CVO) Leadership Networking (Limited Attendance to CVO Management Attendees Only)	Crystal A (Hyatt Regency Chicago - West Tower)
	<i>Moderators: Vicki Searcy, Brandi Zevenbergen, MS, CPMSM, CPCS, MSOW-C</i>	
12:00pm – 1:00pm	M [Optional Networking Lunch] - Meet and Greet with MSOW Help Desk Staff	Wrigley (Hyatt Regency Chicago - West Tower, Bronze Level)
	<i>Moderators: Eric Burpee</i>	
12:00pm – 1:00pm	M [Optional Networking Lunch] - MorCare Strategic Vision	Gold Coast (Hyatt Regency Chicago - West Tower, Bronze Level)
	<i>Moderators: Beth Brand, Gregg Pollack, Mark Stowes</i>	
	Overview of MorCare company plans and strategic direction including benefits to you and your organization.	
1:00pm – 1:15pm	Break	
1:15pm – 2:30pm	C MorCare New Release Overview - Part 2 - Including Case Study of Quality Wizard, Work List & User-Defined Forms (ADA), and Quality Advisory Board Next Steps	Gold Coast (Hyatt Regency Chicago - West Tower, Bronze Level)
	<i>Moderators: Dana Beaver-Lewis, BSN, CPHM, CCP</i>	
	<i>Staff: Rick Chappe, Countess Hope, MHCI, BSN, RN, ACM, Jeanne Kragie, Dana Myers, John Stanik, RN, BSN</i>	
	[Continuation of 10:30am Part 1 session] Overview of new product release items since last year's conference, including a case study of the Quality Management system Wizard, Work List and User-Defined Forms (ADAs) and update on the Quality Advisory Board's next steps.	
	Note: There will be no handouts for this session as much of it will be live demonstration.	
1:15pm – 2:30pm	R Overview of Morrisey's New Extract, Transform and Load (ETL) Process Services	Crystal A (Hyatt Regency Chicago - West Tower)
	<i>Moderators: Ralph Owens, PMP</i>	
	<i>Staff: Tiffany Belk, Steve Larsen, Michael Meyers</i>	
	This session will provide an overview of Morrisey's new Extract, Transform and Load (ETL) process, formerly known as data conversion. The ETL architecture along with its highly interactive customer data review process will be highlighted and discussed in some detail – with special emphasis placed on lessons learned and customer feedback from our first ETL implementations.	
1:15pm – 2:30pm	R Plan, Do, Check, Act Your Credentialing Process Utilizing Lean Processes	Crystal B/C (Hyatt Regency Chicago - West Tower)
	<i>Moderators: Byron Smith</i>	
	<i>Speakers: Janet Rein, RN, CPMSM, Melissa Walters, MHA, CPMSM, CPCS, MSOW-C</i>	

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 processes while also aiming toward 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 duplication and waste in the credentialing process.

In this session we will cover:

- A basic understanding of Lean principles
- The ability to identify "waste" related to credentialing/medical staff department processes/functions
- The ability to apply practical Lean principles in a credentialing/medical staff department

1:15pm – 2:30pm **R Practitioner-centric Credentialing: What is it, and Why now?** Comiskey (Hyatt Regency Chicago - West Tower, Bronze Level)

Moderators: Amy Kleist

Staff: Renee Aird Dengler, RN, MS, CPMSM, CPCS, FMSP

1:15pm – 2:30pm **Q Panel Discussion: Performance Reporting and Evaluation in a Large Health System** Water Tower (Hyatt Regency Chicago - West Tower, Bronze Level)

Moderators: Sarah Cassidy

Speakers: Manoj Pawar, MD

Staff: Vicki Searcy, Mark Smith, MD, MBA, FACS

Panel discussion regarding challenges and strategies for implementation of an effective practitioner performance reporting and evaluation system. Examples will be provided from several systems' experiences including setting peer review standards at Catholic Health Initiatives, a large national healthcare system.

2:30pm – 2:45pm **Break**

2:45pm – 3:45pm **C Best Practices in MorCare Application Administration and Lessons Learned** Water Tower (Hyatt Regency Chicago - West Tower, Bronze Level)

Moderators: Bob Sands

Speakers: Scott Harlow

This session provides an overview of key application administration activities required to keep the University of Virginia Health System care management program working smoothly and consistently.

2:45pm – 3:45pm **C Transforming the Role of Care Management to Support Alternative Payment Models** Gold Coast (Hyatt Regency Chicago - West Tower, Bronze Level)

Moderators: Tina DeWees

Speakers: Mark Walker, RN

This session will overview how a Lawrence General Hospital, a community hospital, redesigned its care delivery model to create a cross-continuum care management team to manage required Accountable Care and Bundled Payment model outcomes. We will discuss strategies to ensure successful change management. Also, we will review the critical role of post-acute care provider partnerships and technologies required to support effective communication and collaboration enabling this organization to achieve clinical and financial success.

2:45pm – 3:45pm **R Apogee Development Update and Enhancement Request Forum** Crystal A (Hyatt Regency Chicago - West Tower)

Moderators: Spiro Georgi

Staff: Paul Glick, Rob Zoldan

Morrisey development and business analytics teams will provide an overview of recent Apogee updates such as improvements to the Add/Change/Terminate report and the Provider/Product Export. They'll also open the floor to hear and discuss suggested enhancements from attendees.

2:45pm – 3:45pm **R MSOW/Apogee Reporting Panel** Comiskey (Hyatt Regency Chicago - West Tower, Bronze Level)

Moderators: Robin Zych, MHS, CPCS, MSOW-C

Speakers: Marty Neff, Kathy Weininger, Eric Zimmermann

Report writers from three Morrisey customer organizations will share the stage to describe their roles in their organizations as well as discuss and share their "top" reports.

2:45pm – 3:45pm **R Transitioning to Enterprise Privilege Content and Criteria Builder (PCCB) Forms and the Conditions Manager** Crystal B/C (Hyatt Regency Chicago - West Tower)

Moderators: Jackie Jones, CPMSM

Staff: Vicki Searcy

Learn about our new enterprise-wide PCCB forms, and the considerations your organization will need to review in order to use this new type of form. We'll also discuss the use of the improved Conditions Manager for tracking FPPE.

3:45pm – 4:00pm **Break**

4:00pm – 5:00pm **C Turning Avoidable Delay Data into Actionable Information: A Vital Case Management Role** Water Tower (Hyatt Regency Chicago - West Tower, Bronze Level)

Moderators: Jeannie Schat

Speakers: Sandra McFolling, RN, MS, ACM, Sally Sekowski

This session outlines the ACMA CompareAD program, including standardized avoidable delay definitions and describes strategies to collect and analyze this information in order to implement process improvements to help ensure safe, efficient patient care.

4:00pm – 5:00pm

R MSOW Forms Editing: Tips and Tricks

Crystal A (Hyatt Regency Chicago - West Tower)

Moderators: Peggy Feeney

Speakers: Michael Carlson

Mike Carlson, systems analyst and seasoned MSOW user at Providence Alaska Medical Center will present some tips and tricks he's developed during his time working on MSOW forms for his organization. He'll discuss topics such as masking fields on a form, benefits of having a uniform font and applying javascript to form fields.

4:00pm – 5:00pm

R MSOW Reporting Update from Morrisey Business Analytics Team

Crystal B/C (Hyatt Regency Chicago - West Tower)

Moderators: Jennifer Green

Staff: Spiro Georgi

Note: This session will not have handouts/slides, as it will be a live demonstration.

4:00pm – 5:00pm

G How to Define and Measure the Success of Your Implementation

Comiskey (Hyatt Regency Chicago - West Tower, Bronze Level)

Moderators: Deborah Beierle, CPCS

Staff: Barry Lancaster, Vicki Searcy

2016 Morrisey Technology and Educational Conference

C Care Management through the Continuum **R** Credentialing and Privileging Management **G** General Interest **M** Meal

Q Quality and Performance Management

AUGUST 18 • THURSDAY

7:15am – 8:15am	M Breakfast	Crystal Foyer (Hyatt Regency Chicago - West Tower)
	Breakfast will be served buffet-style in the Crystal Foyer. Please prepare your meal and take it to the Crystal Ballroom to eat and be seated for the keynote session.	
8:00am – 8:15am	G Announcements and Innovative Solutions Awards	Crystal Ballroom
	<i>Staff: Mark Stowes</i>	
8:15am – 9:15am	G [Keynote] - Technology Trends Driving Change in Healthcare	Crystal Ballroom
	<i>Moderators: Cathy Gardsmith, CPMSM</i>	
	<i>Speakers: Jason Joseph</i>	
	As connected technology becomes even more influential in our lives and our organizations, how will technology trends impact the transformation of the health care industry as a whole and in what ways? In this keynote, Jason Joseph, Senior Vice President of Information Services for the Spectrum Health Delivery System, headquartered in Grand Rapids, MI will highlight the key trends driving health care transformation and the technology trends that will enable these changes to occur in ways not previously possible. Mr. Joseph will discuss the impacts of consumer choice and engagement, reimbursement model changes, shifting focus from encounters to population health, and the disruptive forces of new entrants into the health care marketplace. Combine these external forces with new capabilities for digital patient engagement, improved connectivity between providers, advanced analytics, and a rapidly accelerating CyberSecurity threat landscape, and you have a recipe for disruptive and rapid change.	
9:15am – 9:30am	Break	
9:30am – 10:45am	C Best Practices: Using Business Objects Enterprise to Automate Reports Generation and Distribution	Water Tower (Hyatt Regency Chicago - West Tower, Bronze Level)
	<i>Moderators: John Kandris</i>	
	<i>Speakers: Greg Borden, RN, BS/EB</i>	
	Reports management and distribution is key to the success of any care management system implementation. Greg will overview the types of Crystal reports he has developed to support Sarasota's care management system and also describe how he has configured Business Objects to automate report generation and distribution at his site.	
9:30am – 10:45am	C Demonstration of MorCare Care Management Enhanced Additional Data Answers (ADA)/User-Defined Focus Studies and Transition Planning	Gold Coast (Hyatt Regency Chicago - West Tower, Bronze Level)
	<i>Staff: Countess Hope, MHCI, BSN, RN, ACM, John Stanik, RN, BSN</i>	
	This session provides clinical case studies to demonstrate the many new features and capabilities of user-defined additional data collection and reporting.	
9:30am – 10:45am	R Evergreen Evaluations - What Are They, and How to Store Them in MSOW	Wrigley (Hyatt Regency Chicago - West Tower, Bronze Level)
	<i>Moderators: Meghan Kurtz, MS</i>	
	<i>Staff: Renee Aird Dengler, RN, MS, CPMSM, CPCS, FMSP, Vicki Searcy</i>	
	During this session we'll discuss two types of evergreen evaluations	
	<ol style="list-style-type: none">1. The type of evaluation for practitioners that leave a hospital2. The type of evaluation received from a residency/fellowship training program	
	For the evaluations related to a practitioner who left a hospital we'll discuss how these can be created using MSOW, where they should be stored in MSOW and whether they should they be attached to the MSOW PSV website. We'll then cover the receipt of evergreen evaluations from residency or fellowship training programs and when they should be obtained, the benefits of using these types of evals as references as well as any associated costs.	
9:30am – 10:45am	R How to Transition from the MSOW Practitioner Home Page (PHP) to the new Practitioner Portal	Crystal B/C (Hyatt Regency Chicago - West Tower)
	<i>Moderators: Jamey Lickteig</i>	
	<i>Staff: Jeff Zoldan, Robin Zych, MHS, CPCS, MSOW-C</i>	
	Presenters will discuss some of the key points of consideration for MSOW customer organizations who plan to transition from the MSOW Practitioner Home Page (PHP) to the new MSOW Practitioner Portal (part of MSOW version 3.0).	
9:30am – 10:45am	R Implementing Privilege Content and Criteria Builder (PCCB) Content in a Complex Organization	

Moderators: Annette Martyn

Comiskey (Hyatt Regency Chicago - West Tower, Bronze Level)

Speakers: Wendy Crimp, BSN, MBA, CPHQ, Ann Recatto, BSN,

RN

Many organizations take advantage of the best practice content offered by PCCB to contemporize the privilege delineations and criteria utilized to manage clinical competence in their organization(s). This session will review best practices for setting up an effective project structure and approach that assists organization(s) in development and implementation of new privilege forms in a complex environment. The session will include presentation of a real life experience at a large, complex organization that has been fully implemented in the past year. The value of lessons

9:30am – 10:45am

R Using MSOW to Assist with Innovation in Medical Staff Services and Credentialing

Moderators: Cathy Gardsmith, CPMSM

Crystal A (Hyatt Regency Chicago - West Tower)

Speakers: Barbara Warstler, MBA, CPMSM, Lisa Zuppert

During this budget-conscious time in health care, everyone is being challenged to be efficient and do more with less. In this session, we will describe the evolution of the medical staff services and credentialing office over the last ten years. We will discuss innovative ways to increase efficiency in the profession by utilizing MSOW. Additionally, we will review how these efficiencies add value to hospitals and health systems.

9:30am – 10:45am

Q Racing to Winning Outcomes with the MorCare Trifecta Solution: Quality Management, Peer Review and Performance Management

Soldier Field (Hyatt Regency Chicago - West Tower, Bronze Level)

Staff: Dana Beaver-Lewis, BSN, CPHM, CCP, Jeannie Schat

Learn how using integrated solutions between MorCare and Morrisey Associates can improve communication and help to drive better quality outcomes. This session will showcase integration among various MorCare quality and performance reporting solutions. We will demonstrate how quality issues documented in MorCare Quality Management can be referred to the Morrisey Peer Review Manager module for committee case review. Following case review, results and findings are stored in the quality management system and then the peer review results are automatically reportable within the performance management system.

10:45am – 11:00am

Break

11:00am – 12:00pm

C Creating A Cross-functional Collaborative Team Between Utilization Review and Insurance Verification Functions

Moderators: Tina DeWees

Soldier Field (Hyatt Regency Chicago - West Tower, Bronze Level)

Speakers: Kelley Carlisle, Sarah Clark, RN-BC, BSN, MHA/INF, CCM

11:00am – 12:00pm

C Utilizing MorCare Care Management to Support Bundled Payment Initiatives

Moderators: Bob Wagner

Gold Coast (Hyatt Regency Chicago - West Tower, Bronze Level)

Staff: Dana Myers

This session will overview how health systems can configure MorCare Care Management to support bundled payment initiatives.

Note: There will be no handouts for this session, as much of it will be live demonstration.

11:00am – 12:00pm

R Morrisey Views Directory (MVD) for MSOW Introductory Demonstration and Customer Sharing Portal

Moderators: Robin Zych, MHS, CPCS, MSOW-C

Crystal B/C (Hyatt Regency Chicago - West Tower)

Staff: Spiro Georgi

Spiro Georgi, business intelligence analyst, and team have been busy building a new web-based interactive system to facilitate understanding and use of the many MSOW reporting views. During this session, Spiro will present this new system and how to use it as a resource to facilitate development of ad-hoc reports required to support your reporting needs. The new customer report sharing portal will also be demonstrated.

Note: This session will not have handouts/slides, as it will be a live demonstration.

11:00am – 12:00pm

R Privileging Nightmares and the Legal Ramifications

Comiskey (Hyatt Regency Chicago - West Tower, Bronze Level)

Moderators: Deborah Beierle, CPCS

Speakers: Michael Callahan

Staff: Jackie Jones, CPMSM

During this session Morrisey consultant, Jackie Jones, CPMSM will provide an overview of the common challenges and pitfalls she encounters while performing privileging consulting at hospitals and health systems. Some of the topics she'll cover are:

- Qualifications/Criteria
- Special or advanced privileges
- Current training requirements
- FPPE/OPPE policies and their intent
- CMS November 2004 letter

- Laundry lists vs. core privileges

Michael Callahan, partner, Katten Muchin Rosenman will be co-presenting the session with Jackie, and will provide the legal viewpoint on the topics she uncovers. For example, the impact that health care reform and the focus on quality outcomes will have on privileging. Michael will also touch on the increased legal liability related to non-compliance with privileging requirements as well as how to maximize peer review privilege protections.

11:00am – 12:00pm	R Using a Standard Application Request Form to Ensure a Seamless Onboarding Process	Crystal A (Hyatt Regency Chicago - West Tower)
	<i>Moderators: Amy Kleist</i>	
	<i>Speakers: Patricia E Brown</i>	
	This session will explore the benefits of using a standard application request form. We will cover the benefits of identifying practitioner's location(s) and addresses early on in the onboarding process. The presenter will also outline how the form has help foster the relationship between recruiters, and practice managers creating a seamless process.	
11:00am – 12:00pm	Q Navigating CMS Quality Initiatives to Avoid Penalties	Water Tower (Hyatt Regency Chicago - West Tower, Bronze Level)
	<i>Moderators: John Stanik, RN, BSN</i>	
	<i>Speakers: Debbie Hoffman, RN, Linda Sallee</i>	
	Come to this session to learn about the new CMS Quality Measures and how they impact reimbursement. There will be special focus on the impact of the readmission rates, how they impact reimbursement and way to improve your rates. Finally, an overview of hosital acuquired conditions (HACs) will be provided including their impact on reimbursement and ways to improve documentation reduce the incidents of these events.	
12:00pm – 1:00pm	Discovery Centers - All Solutions	Crystal Foyer (Hyatt Regency Chicago - West Tower)
	<i>Staff: Bob Sands, Robin Zych, MHS, CPCS, MSOW-C</i>	
	Discovery Centers are available for attendees to ask questions about or see a live demonstration of all of our enterprise software solutions.	
12:00pm – 1:00pm	M Lunch - General Seating	Crystal B/C (Hyatt Regency Chicago - West Tower)
	Lunch will be served buffet-style in the Crystal Foyer. Please prepare your meal and take it to Crystal B/C to eat.	
12:00pm – 1:00pm	M [Optional Networking Lunch] - Bundled Payments Networking	Water Tower (Hyatt Regency Chicago - West Tower, Bronze Level)
	<i>Staff: Dana Beaver-Lewis, BSN, CPHM, CCP, Dana Myers</i>	
	Meet with your peers and share your strategies for successfully managing the transition from fee-for-service to value-based care reimbursement, including bundled payments and partnerships you've developed to manage key patient populations throughout the continuum of care.	
12:00pm – 1:00pm	M [Optional Networking Lunch] - IT Leadership Networking	Soldier Field (Hyatt Regency Chicago - West Tower, Bronze Level)
	<i>Moderators: Joe Brunner, JD, CISSP, CEH, Ron Ross</i>	
12:00pm – 1:00pm	M [Optional Networking Lunch] - Lunch and Learn - MorCare Additional Data Answers (ADA)	Gold Coast (Hyatt Regency Chicago - West Tower, Bronze Level)
	<i>Staff: Rick Chappe, John Stanik, RN, BSN</i>	
	Meet with the MorCare team and to learn about the newly enhanced additional data answers (ADA) collection capabilities of the system.	
12:00pm – 1:00pm	M [Optional Networking Lunch] - Report Writer Networking and Demonstration of Customer Report Sharing Portal	Crystal A (Hyatt Regency Chicago - West Tower)
	<i>Moderators: Spiro Georgi</i>	
12:00pm – 1:00pm	M [Optional Networking Lunch] - Time with Your MSOW/Apogee Application Specialists	Comiskey (Hyatt Regency Chicago - West Tower, Bronze Level)
	<i>Moderators: Valorie Hoflack, Vanessa Valdovinos, Andrea Vasata</i>	
	Morrisey's MSOW/Apogee application specialists will be available to take questions you may have about MSOW/Apogee - questions about a new feature or about how to accomplish something you've wanted to do in the system? This is the session for you, come with your questions!	
1:00pm – 1:15pm	Break	
1:15pm – 2:30pm	C Best Practices: Patient Care Transitions	Gold Coast (Hyatt Regency Chicago - West Tower, Bronze Level)
	<i>Moderators: Tracy Wyrick, RN, CCM</i>	
	<i>Speakers: Paige Leeman</i>	
	The MorCare Transitions of Care system is being rolled out in healthcare systems across the country. Lawrence General Hospital (LGH) is one of the sites that recently went live with the system. Two of the LGH implementation team members will present its experience and successes and lessons learned to date.	
1:15pm – 2:30pm	C Guide Your MorCare Reporting Efforts Using the New Morrisey Views Directory (MVD) System	Water Tower (Hyatt Regency Chicago - West Tower, Bronze Level)
	<i>Staff: John Kandris, Jeanette Loza</i>	

John Kandris, manager of business analytics services, and his team have been busy building a new web-based interactive system to facilitate understanding and use of the many MorCare reporting views. During this session, John will present this new system and how to use it as a resource to facilitate development of ad-hoc reports required to support your care management needs.

Note: This session will not have handouts/slides, as it will be a live demonstration.

1:15pm – 2:30pm	R MSOW Enhancement Request Forum <i>Moderators: Deborah Beierle, CPCS, Cathy Gardsmith, CPMSM</i> <i>Staff: Terry Griffith, Rob Zoldan</i> Morrisey's MSOW enhancement review committee will discuss how they review enhancement requests as well as methods users can use to submit enhancement requests. Then the discussion will be opened to the audience of attendees to bring forward their own suggestions for discussion in a group setting.	Crystal B/C (Hyatt Regency Chicago - West Tower)
1:15pm – 2:30pm	R Past, Present and Future: The American Board of Medical Specialties (ABMS) and the Maintenance of Certification (MOC) <i>Moderators: Meghan Kurtz, MS</i> <i>Staff: Renee Aird Dengler, RN, MS, CPMSM, CPCS, FMSP, Vicki Searcy</i> With the advent of Maintenance of Certification (MOC), understanding and tracking board certification has become more complex and isn't going to get easier any time soon. This session will explore American Board of Medical Specialties (ABMS) board certification and the intricacies of MOC along with recent changes, legislation and future plans.	Crystal A (Hyatt Regency Chicago - West Tower)
1:15pm – 2:30pm	R Practical Advice for Using MSOW for Your Joint Commission Survey <i>Moderators: Jennifer Green</i> <i>Speakers: Nancy Miller, MHSA, CPMSM, CHC, Eon Stephens, CPCS, CPMSM</i> After four Joint Commission surveys in 2015, where we completely wowed the physician surveyors, we would like to demonstrate the technology and power of MSOW. This session is full of practical advice and we will share with you how to navigate the system to display your files electronically and never print another hard copy file again for a survey. We will cover scanning your documents, web crawls, and using the blue buttons appropriately to present the requested documents and privileging. Learn from our recent experiences; a hospital survey, an Outpatient Surgery Center survey and two disease specific surveys, what the surveyors were focused on and what fascinated them about the robust MSOW software and its capabilities.	Comiskey (Hyatt Regency Chicago - West Tower, Bronze Level)
1:15pm – 2:30pm	Q Outcomes Reporting for Alternative Payment Models, Including ACOs and Bundled Payments <i>Moderators: Dana Beaver-Lewis, BSN, CPHM, CCP</i> <i>Speakers: Debbie Hoffman, RN, Linda Sallee</i> This session defines and describes accountable care organizations (ACOs). It will provide a definition and overview of the bundled payment program, including required quality metrics that must be reported and how they impact reimbursement.	Wrigley (Hyatt Regency Chicago - West Tower, Bronze Level)
2:30pm – 2:45pm	Break	
2:45pm – 3:45pm	C Best Practices: Readmission Risk Assessments <i>Moderators: Jeannie Schat</i> <i>Speakers: Sarah Clark, RN-BC, BSN, MHA/INF, CCM</i> This session will focus on building an effective readmission risk assessment in MorCare Care Management at a multi-hospital system. The session will outline how to build an effective data collection mechanism and effective interventions and follow-up activities to ensure reduction in avoidable readmission rates.	Water Tower (Hyatt Regency Chicago - West Tower, Bronze Level)
2:45pm – 3:45pm	C Care Transitions: Building Effective Post-Acute Care (PAC) Partnerships <i>Moderators: Tracy Wyrick, RN, CCM</i> <i>Speakers: Jennifer Finn, MSN, RN</i> <i>Staff: Ellen Chappe</i> Post acute care provider partners are key to the success of any acute care hospital. During this session, learn about the experiences of a major post-acute care provider who uses the MorCare Transitions of Care system to manage referrals from an acute care facility. They'll also discuss how they partner to ensure safe, effective care transitions to improve patient outcomes and reduce the risk of readmissions.	Gold Coast (Hyatt Regency Chicago - West Tower, Bronze Level)
2:45pm – 3:45pm	R Delegation/Contracting Negotiation: Why the Medical Staff Office Should Have a Seat at the Table <i>Moderators: Vicki Searcy</i>	Comiskey (Hyatt Regency Chicago - West Tower, Bronze Level)

Speakers: Kris Olson

Kris Olson, Vice President, Physician and Professional Services at Essentia Health will discuss the importance and need for the Medical Staff Office (MSO) to be included in payer contracting discussion and negotiation. She will also provide pointers for successfully bringing your team together to bring together policy, auditing and contracting. Speaking from her own experience, she will provide the lessons she's learned through taking on this task in a large integrated health system.

2:45pm – 3:45pm **R Should Payor Enrollment be a Part of your CVO?** Crystal A (Hyatt Regency Chicago - West Tower)
Moderators: Brandi Zevenbergen, MS, CPMSM, CPCS, MSOW-C
Speakers: Cheryl Cisneros, RN, CPMSM, CPCS

2:45pm – 3:45pm **R Transition to the MSOW 3.0 Administrative Review Module (ARM) for Health Systems** Crystal B/C (Hyatt Regency Chicago - West Tower)
Moderators: Robin Zych, MHS, CPCS, MSOW-C
Staff: Amy Kleist, Meghan Kurtz, MS
Learn about the new feature of the Administrative Review Module (ARM) included in MSOW 3.0.

2:45pm – 3:45pm **Q Unique Advantages and Protections Offered by PSOs to Improve Patient Care** Soldier Field (Hyatt Regency Chicago - West Tower, Bronze Level)
Moderators: Dana Beaver-Lewis, BSN, CPHM, CCP
Speakers: Michael Callahan, Kathy Connolly

- How does participation in a PSO improve quality and reduce patient risk?
- What patient safety activity information can be protected?
- What operational steps are needed to implement participation in a PSO?
- What steps to take in order to maximize privilege protections?

3:45pm – 4:00pm **Break**

4:00pm – 5:00pm **C Discharge Planning to Meet Regulations** Gold Coast (Hyatt Regency Chicago - West Tower, Bronze Level)
Moderators: Tina DeWees
Speakers: Vivian Street, RN, BSN, CCM, IQCI
Staff: Countess Hope, MHCI, BSN, RN, ACM
This session will focus on building a process to ensure that the documentation required to meet regulatory requirements is integrated into discharge planning workflows. If this process is configured appropriately, then it is possible to review cases online with external reviewers to demonstrate compliance.

4:00pm – 5:00pm **C Enhance Your MorCare Reporting with the Expanded WEBI Universe, including Continuum and Transitions of Care (TOC)** Water Tower (Hyatt Regency Chicago - West Tower, Bronze Level)
Moderators: John Kandris
Staff: Dana Beaver-Lewis, BSN, CPHM, CCP, Dana Myers, Tracy Wyrick, RN, CCM
MorCare's Webi universe has been updated to include data related to both the Continuum of Care and the Transitions of Care systems. This session will demonstrate how to use Webi to develop reports in these areas of the system.

Note: There will be no handouts for this session, as much of it will be live demonstration.

4:00pm – 5:00pm **R Best Practices for Payor Enrollment** Crystal A (Hyatt Regency Chicago - West Tower)
Moderators: Vicki Searcy
Speakers: Cheryl Cisneros, RN, CPMSM, CPCS

4:00pm – 5:00pm **R MSOW Administrative Review Module (ARM) - Implementation and Beyond, Our Experience** Crystal B/C (Hyatt Regency Chicago - West Tower)
Moderators: Jennifer Green
Speakers: Tamara Reid-Lucas, CPCS, Janet Rein, RN, CPMSM
In July of 2015, Sibley Memorial Hospital, a 325-bed community hospital in Washington, DC, ventured on the path to implement electronic review and sign-off of the files for 932 credentialed practitioners. This action was in response to the reviewers having to physically come to the hospital to perform this function which, in turn, caused delays in getting the applications to Credentials Committee. This session will tell the story of how Sibley prepared, implemented, educated and currently manages the MSOW Administrative Review Module. It will also provide insight on what went right as well as some of the challenges the team experienced.

4:00pm – 5:00pm **R The Journey to Paperless Case Review; From Case Identification through Final Committee Determination** Comiskey (Hyatt Regency Chicago - West Tower, Bronze Level)
Moderators: Amy Kleist
Speakers: Rebecca Stackhouse, RN, PCCN, Michelle Weaver, MCSM
This session will tell the story of how a Morrissey MSOW customer organization used the Peer Review Manager (PRM) to streamline their Case Review process and go paperless in the process. The presenters will discuss the

implementation process for PRM as well as the Case Review process at their facility using PRM. They will also cover the initial setup of PRM and case identification and the process from case identification to final committee determination of outcome.

4:00pm – 5:00pm

Q Top 10 Patient Safety List for 2016

Soldier Field (Hyatt Regency Chicago - West Tower, Bronze Level)

Moderators: Mark Stowes

Speakers: Kathy Connolly

Patient safety is a top priority for every healthcare organization. Knowing where to direct patient safety initiatives can be a daunting task with the tighter budget margins most healthcare organizations are experiencing. To help guide organizations in deciding where to focus their patient safety efforts, ECRI Institute compiles an annual list of the top 10 patient safety concerns confronting healthcare organizations. The third annual Top 10 Patient Safety List was released in April 2016. The top 10 list is largely based on recurring trends identified from the data voluntarily submitted to ECRI Institute's Patient Safety Organization for review and analysis. This session will review each of the top 10 patient safety concerns as well as suggested risk mitigation strategies for healthcare organizations to address these concerns.

6:30pm – 10:00pm

[PRE-REGISTRATION REQUIRED] - Customer Awards Dinner

The Chicago Sports Museum & Harry Caray's 7th Inning Stretch (7th Floor Water Tower Place, 835 N. Michigan Ave, Chicago, IL 60611)

For Google Map directions to the Chicago Sports Museum, [click here](#).

The Chicago Sports Museum & Harry Caray's 7th Inning Stretch

7th Floor Water Tower Place

835 N. Michigan Ave

(enter 1/2 block east, back side of Water Tower Place)

Chicago, IL 60611

1 mile from Hyatt Regency - enter Water Tower Place through rear entrance, 1/2 block east of Michigan Ave (between Pearson and Chesnut) near Ritz Carlton.

- Walk: 15-20 minutes
- Cab: 5-10 minutes

For local guests driving to the dinner, parking is discounted to \$12 for 5 hrs. You can get your parking ticket validated at the host stand in the restaurant.

2016 Morrissey Technology and Educational Conference

C Care Management through the Continuum **R** Credentialing and Privileging Management **M** Meal

AUGUST 19 • FRIDAY

7:45am – 8:30am	R Q&A with HealthStream	Crystal Ballroom
	<i>Staff: Jonas Fridrichsen, Bobby Frist, Paul Glick, Vicki Searcy, Meg Terry, Rob Zoldan</i>	
	During breakfast on Friday, HealthStream executives will be available for an informal Q&A with Morrissey customers.	
7:45am – 8:30am	M Breakfast	Crystal Foyer (Hyatt Regency Chicago - West Tower)
	Breakfast will be served buffet-style in the Crystal Foyer. Please prepare your meal and take it to the Crystal Ballroom to eat.	
8:30am – 9:15am	R MSOW/Apogee Help Desk Q&A	Comiskey (Hyatt Regency Chicago - West Tower, Bronze Level)
	<i>Staff: Eric Burpee, Rob Hirsh</i>	
	Take a chance to be face-to-face with the MSOW/Apogee help desk staff to ask your burning questions. You'll also learn some tips for best practices when reaching out to the help desk to ensure quick timely service!	
8:30am – 9:15am	R Provider Enrollment and Managed Care Networking	Wrigley (Hyatt Regency Chicago - West Tower, Bronze Level)
	<i>Moderators: Annette Martyn</i>	
	<i>Speakers: Cheryl Cisneros, RN, CPMSM, CPCS</i>	
	Join this session if you are using Apogee for managed care/provider enrollment - meet up with fellow users and network and discuss hot topics.	
8:30am – 10:30am	C MorCare Enhancement Round Table	Water Tower (Hyatt Regency Chicago - West Tower, Bronze Level)
	<i>Moderators: Bob Sands</i>	
	<i>Staff: Rick Chappe, Jeanne Kragie</i>	
	Come prepared to describe your top enhancement requests and to weigh in on requests being made by your peers. MorCare's director of customer support and the senior vice president of development will review progress made since last year's conference and take notes on new requests from customers at this year's conference.	
9:30am – 10:15am	R Engaging and Training New and Change-Resistant MSOW/Apogee Users	Comiskey (Hyatt Regency Chicago - West Tower, Bronze Level)
	<i>Moderators: Jacob Zych</i>	
	<i>Speakers: Diane Landahl, CPCS</i>	
	Have you experienced difficulty in engaging your team with new systems and processes? Are they resistant to changing their processes and methods? During this session Diane Landahl will share best practice methods for overcoming the hurdles with team members who are resistant to change.	
10:30am – 11:30am	C MorCare Reporting Round Table	Water Tower (Hyatt Regency Chicago - West Tower, Bronze Level)
	<i>Staff: Ellen Chappe, John Kandris, Jeanette Loza</i>	
	John Kandris, manager of business analytics services, will overview plans to improve the MorCare reporting environment, including new tools and options for data analysis, ad-hoc reporting, and plans for dashboarding. This session will be interactive, so come prepared to share your thoughts.	
	Note: This session will not have handouts/slides.	
