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**M · O · R · R · I · S · E · Y<sup>®</sup>**

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***A HealthStream<sup>®</sup> Company***

# 2017 Morrisey Technology and Educational Conference

August 9-11, 2017 | The Hyatt Regency Chicago

# Registration Information

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Register online [here](#).

## Hotel Accomodations

Group Rate: \$219/night (single/double)

- Rate will remain until block is full or **July 7**, whichever comes first
- [Book online](#) or by phone, (888) 421-1442 and mention the **Morrisey Conference**

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### Full Meeting (Aug 9-11, 2017)

Early Bird Registration - \$600

*(Registration and payment must be received before July 15, 2017)*

Standard Registration - \$700

*(Registrations received after July 15, 2017, payment must be received by August 2, 2017)*

### One-Day Registration - \$450

*(Payment must be received by August 2, 2017)*

### Pre-Conference

**(Aug 7-8, 2017)**

MSOW Advanced Crystal Reports Class- \$750

MSOW Practitioner Portal Template Building

Workshop - \$750

**(Aug 8, 2017)**

MSOW Certification Exam - \$75

### Registration Payment Options

- **Credit Card** (via [online registration](#))
- **Check**

Please make check payable to **Morrisey, A HealthStream Company** and mail it with a copy of your registration confirmation email to:

**Morrisey, A HealthStream Company**  
attn: Andrea Schmitz, Marketing Manager  
222 South Riverside Plaza  
Suite 1850  
Chicago, IL 60606

### **NOTE:**

All registrations and payments are final. No refunds or transfers will be provided.

# 2017 Morrisey Technology and Educational Conference

**B** Breakout Session **K** Keynote **P** Pre-Conference

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## AUGUST 7 • MONDAY

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9:00am – 4:00pm

**P Optional Pre-Conference Add-on: MSOW Advanced Crystal Reports Class**

*Speakers: Robin Zych, MPopH-C, MHS,* Morrisey Training Room (222 S. Riverside Plaza, Suite 1850 Chicago, IL 60606)  
*CPCS, MSOW-C*

Experienced Crystal Reports users benefit from this advanced class. Practice complex exercises using real MSOW credentialing software data, and develop sophisticated skills for managing your organization's reports. A prerequisite to this class is attendance in the **MSOW Beginner Crystal Reports: MSOW/Apogee Reporting Class** or at least one year of Crystal Reports experience.

Topics will include:

- Writing advanced formulas
- Summarizing and counting
- Defining and sharing variables
- Creating cross-tab reports
- Building sub reports
- Using SQL expressions
- Formatting for Excel output
- Charting data
- Optimizing reports

\$750/person

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9:00am – 4:00pm

**P Optional Pre-Conference Add-on: MSOW Practitioner Portal Template Building Workshop**

Northwestern Memorial Hospital - Training Room 996 (Northwestern Memorial Hospital - 541 N. Fairbanks Ct, Room 996 Chicago, IL 60611)

*Speakers: Peggy Feeney, Jamey Lickteig*

This two-day workshop will walk you through the basics of building an MSOW Practitioner Portal Template for use in collecting practitioner/allied health data at appointment and reappointment time.

Key learning objectives:

- Learn how to review pre-loaded template samples
- Learn how to create a customized template based on a pre-loaded template sample
- Learn how to test templates
- Learn how to set up additional portal features (e-signatures, image requests, etc.)

\$750/person

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## AUGUST 8 • TUESDAY

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9:00am – 4:00pm

**P Optional Pre-Conference Add-on: MSOW Advanced Crystal Reports Class**

*Speakers: Robin Zych, MPopH-C, MHS,* Morrisey Training Room (222 S. Riverside Plaza, Suite 1850 Chicago, IL 60606)  
*CPCS, MSOW-C*

Experienced Crystal Reports users benefit from this advanced class. Practice complex exercises using real MSOW credentialing software data, and develop sophisticated skills for managing your organization's reports. A prerequisite to this class is attendance in the **MSOW Beginner Crystal Reports: MSOW/Apogee Reporting Class** or at least one year of Crystal Reports experience.

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- Building sub reports
- Using SQL expressions
- Formatting for Excel output
- Charting data
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\$750/person

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- Learn how to review pre-loaded template samples
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- Learn how to test templates
- Learn how to set up additional portal features (e-signatures, image requests, etc.)

\$750/person

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2:00pm – 4:00pm

**P Optional Pre-Conference Add-on: MSOW Certification Exam**

TBA

*Speakers: Vanessa Valdovinos*

The MSOW certification exam is structured such that the test taker will only be required to answer questions corresponding to the modules their organization has licensed. The final score will be tallied based only on sections that apply to the test taker.

Exam is multiple choice, 100 questions.

\$75/person.

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6:00pm – 7:00pm

**Early Check-in**

Crystal Foyer

*Moderators: Andrea Schmitz*

Avoid the Wednesday morning rush - come check-in to the conference early! Pick up your name badge and conference materials in the Crystal Foyer (West Tower, street level).

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# 2017 Morrisey Technology and Educational Conference

**B** Breakout Session **K** Keynote **P** Pre-Conference

## AUGUST 9 • WEDNESDAY

|                   |   |                  |
|-------------------|---|------------------|
| 8:00am – 9:00am   | <b>Conference Check-in and Breakfast</b><br><i>Moderators: Andrea Schmitz</i><br>If you didn't check in during our early check-in Tuesday evening, please stop by to pick up your name badge and conference materials before grabbing breakfast and heading in to the Crystal Ballroom for the conference welcome and keynote presentation.   | Crystal Ballroom |
| 9:00am – 10:15am  | <b>K Conference Welcome and Keynote Presentation</b><br><i>Speakers: Michael Sousa</i><br>Morrisey President, Michael Sousa, will provide a keynote presentation to attendees.  | Crystal Ballroom |
| 10:15am – 10:30am | <b>Break</b>  | TBA              |
| 10:30am – 12:00pm | <b>B Live Demonstration of Key Features of MSOW version 3.0+</b><br><i>Speakers: Robin Zych, MPopH-C, MHS, CPCS, MSOW-C</i><br>Need to brush up on all the new features in MSOW versions 3.0+? Add this session to get a good overview and demonstration of all the key features.   | TBA              |
| 10:30am – 12:00pm | <b>B Panel Discussion: Implementing MSOW Administrative Review in MSOW version 3.0+</b><br><i>Speakers: Lynn Kander, CPCS, CPMSM, Amy Kleist, Meghan Kurtz, MS, Renee Zimmerman, RN, MSN, MBA, CPMSM, CPCS</i><br>During this session a panel of MSOW health system users will discuss the details of implementing MSOW Administrative Review in a health system environment. They will also discuss the considerations of the new features of MSOW Administrative Review in MSOW version 3.0+. Also on the panel will be Morrisey Client Success Director, Amy Kleist and Senior Client Success Manager, Meghan Kurtz. | TBA              |
| 12:00pm – 1:00pm  | <b>(Invitation-Only) Morrisey Strategic Accounts Meeting</b><br><i>Staff: Vicki Searcy, Mark Westbrook, PMP</i>   | TBA              |
| 12:00pm – 1:00pm  | <b>Lunch - General Seating</b>  | Crystal Ballroom |
| 12:00pm – 1:00pm  | <b>MSOW Help Desk Meet &amp; Greet</b><br><i>Staff: Steve Larsen</i><br>Meet and Greet with Morrisey's Help Desk analysts. Put a face with the name you speak to and get to know the team.  | TBA              |
| 12:00pm – 1:00pm  | <b>Optional Networking Lunch: Time with your Trainer</b><br><i>Speakers: Valorie Hoflack, MSOW-C, Vanessa Valdovinos, Andrea Vasata</i><br>Morrisey's knowledgeable MSOW application specialists will be available to take questions you may have about MSOW, new features or "how to" needs. This session is an optional networking lunch session, so you will need to grab your lunch in the Crystal Foyer, then head to the assigned room for this networking lunch.<br><br>Space is limited.  | TBA              |
| 1:00pm – 2:30pm   | <b>B High Risk Behaviors in Privileging</b><br><i>Speakers: Wendy Crimp, BSN, MBA, CPHQ, Jackie Jones, CPMSM</i>  | TBA              |
| 1:00pm – 2:30pm   | <b>B Morrisey Development Update</b><br><i>Speakers: Brandi Zevenbergen, MS, CPMSM, CPCS, MSOW-C, Scott Zoldan</i><br>Morrisey development and product management leadership will provide an update on product development as well as new development methodologies.  | TBA              |
| 1:00pm – 2:30pm   | <b>B Redefining Roles and Responsibilities in Credentialing Departments</b><br><i>Speakers: Renee Aird Dengler, RN, MS, CPMSM, CPCS, FMSP, Meghan Kurtz, MS</i>   | TBA              |

Given the constant change in health care these days, it is important to take time to consider the roles and responsibilities of your organization's credentialing/payer enrollment and onboarding team. Has new technology, new department activities/duties, new facilities/added practitioner load affected how efficiently your organization operates? It might be time to think about redefining the roles and responsibilities of your team members to better align with your organization's workload and goals. Gain some insider knowledge from our client experience and consulting team based on the work they do helping organization's face this task day in and day out. Bring home some actionable knowledge!

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| 2:30pm – 2:45pm | <b>Break</b>   | TBA |
| 2:45pm – 3:45pm | <b>B Bridge Between Privileging, Performance Measurement, Competency Assessment</b><br><i>Speakers: Vicki Searcy, Mark Smith, MD, MBA, FACS</i>  | TBA |
| 2:45pm – 3:45pm | <b>B Business Intelligence Analyst Workshop: Workflow Process Reporting</b><br><i>Speakers: Spiro Georgi</i><br>Learning objectives: <ul style="list-style-type: none"> <li>• Workflow process/job/task completion # days</li> <li>• Difference in # days between different jobs/tasks</li> <li>• Average # days of completion for jobs/tasks</li> <li>• Time for any ideas users attending the sessions may have</li> </ul>   | TBA |
| 2:45pm – 3:45pm | <b>B The Good, the Bad and the Ugly: Lessons Learned from Merging 2 MSOW Databases</b><br><i>Speakers: Kristine Collins, Jennifer Green, Steve Larsen, Dara Phachantry, Eric Zimmermann</i><br>Do you know how you only really purge and get organized when you move? It's the same with your database. When two health systems merged there were two separate MSOW databases. Eighteen months later there is a new, single database. In this session we'll share with you the lessons learned in integrating systems from both a technology and business perspective – the good, the bad and the ugly!  | TBA |
| 3:45pm – 4:00pm | <b>Break</b>   | TBA |
| 4:00pm – 5:00pm | <b>B Morrisey Performance Analytics</b>  | TBA |
| 4:00pm – 5:00pm | <b>B NCQA Certification: Don't Apply Until You Comply</b><br><i>Speakers: Renee Aird Dengler, RN, MS, CPMSM, CPCS, FMSP</i><br>Preparing for a survey is more than filling out the application and paying the fee. It includes really knowing what the standards require, policies, procedures, processes, establishment of a working committee(s), etc. For a successful survey, make sure you have a solid foundation before sending in the application.   | TBA |
| 4:00pm – 5:00pm | <b>B Panel Discussion: MSOW Report Sharing</b><br><i>Moderators: Spiro Georgi, Robin Zych, MPopH-C, MHS, CPCS, MSOW-C</i><br><i>Speakers: Wylie Chan, Suzanne Cummings, MS, CPCS, Donna Godard</i>   | TBA |
| 4:00pm – 5:00pm | <b>B Transitioning to the Practitioner Portal - MSOW version 3.0+</b><br><i>Moderators: Jamey Lickteig</i><br><i>Speakers: John Coffee</i><br>Learning objectives: <ul style="list-style-type: none"> <li>• Help to users who haven't started the process (especially those who are using paper applications now) to know what is needed to navigate the process as painlessly as possible</li> <li>• Understand the relationship between MSOnet forms and Portal templates</li> <li>• Potential pitfalls – lessons we've learned thus far</li> <li>• There's light at the end of the tunnel!</li> </ul> | TBA |

# 2017 Morrisey Technology and Educational Conference

**B** Breakout Session **K** Keynote **P** Pre-Conference

## AUGUST 10 • THURSDAY

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|-------------------|---|------------------|
| 7:15am – 8:15am   | <b>Breakfast</b><br>Breakfast will be served in the Crystal Foyer, please take your meal into the Crystal Ballroom for the keynote presentation.  | Crystal Ballroom |
| 8:15am – 9:15am   | <b>K Keynote - The 2017 Annual Report on Medical Staff Credentialing</b><br><i>Speakers: Vicki Searcy, Michael Sousa</i><br>Our president, Michael Sousa, along with Vicki Searcy, our vice president, client services and consulting will present highlights and insights from HealthStream's 2017 Annual Report on Medical Staff Credentialing.   | Crystal Ballroom |
| 9:15am – 9:30am   | <b>Break</b>  | TBA              |
| 9:30am – 10:45am  | <b>B Enhancement Forum: MSOW Credentialing</b><br><i>Speakers: Brandi Zevenbergen, MS, CPMSM, CPCS, MSOW-C, Scott Zoldan</i>  | TBA              |
| 9:30am – 10:45am  | <b>B Integrating Payer Enrollment and Credentialing</b><br><i>Speakers: Cheryl Cisneros, RN, BSN, CPCS, CPMSM, Renee Aird Dengler, RN, MS, CPMSM, CPCS, FMSP, Julie Harrelson, CPMSM, CPCS, MSOW-C, Monica Muralles, CPCS</i><br>More and more, health care organizations are beginning to see a blur in the line between traditional credentialing and payer enrollment. Due to process efficiencies, elimination of duplicative work and even budget constraints - many credentialing and payer enrollment departments are starting to see the need to integrate. Accomplishing this can be a tall task, but with the right considerations and planning it is do-able achievement. Learn from those who have been there on what to consider and best practices for overcoming this integration. | TBA              |
| 10:45am – 11:00am | <b>Break</b>  | TBA              |
| 11:00am – 12:00pm | <b>B Business Intelligence Analyst Workshop: Best Practices for Creating Crystal Reports for Use as Spreadsheets</b><br><i>Speakers: Spiro Georgi</i><br>This interactive session will focus on reporting methods to enable Crystal Reports to display the same type of record in separate columns for use as a spreadsheet formatted reporting output. One example of a use case for this methodology would be the Practitioner Credentials data: Medical Education vs Internship vs Residency, etc.   | TBA              |
| 11:00am – 12:00pm | <b>B How to Aggregate and Manage Team Performance</b><br><i>Speakers: Wendy Crimp, BSN, MBA, CPHQ, Mark Smith, MD, MBA, FACS</i>  | TBA              |
| 11:00am – 12:00pm | <b>B Panel Discussion: Practitioner Portal Implementation</b><br><i>Speakers: Jan Brown, RN, MN, Julie Drouillard, Amy Kleist, Meghan Kurtz, MS</i><br>Panel discussion of experiences MSOW users have had while implementing the new MSOW Pratictioner Portal. Amy Kleist, Director of Client Experience will also join the panel. Some of the key Practitioner Portal features that will be discussed:<br><ul style="list-style-type: none"> <li>• Building portal templates and how they differ from application forms</li> <li>• Features of the Practitioner Portal</li> <li>• Considerations for health systems vs. single facility</li> </ul>  | TBA              |
| 12:00pm – 1:00pm  | <b>Lunch - General Seating</b>  | Crystal Ballroom |
| 12:00pm – 1:00pm  | <b>Optional Networking Lunch: Meeting the Challenges of Payer Reports and Rosters</b><br><i>Speakers: Neil Berry, Cheryl Cisneros, RN, BSN, CPCS, CPMSM</i>   | TBA              |
| 12:00pm – 1:00pm  | <b>Optional Networking Lunch: Time with your Trainer</b><br><i>Speakers: Valorie Hoflack, MSOW-C, Vanessa Valdovinos, Andrea Vasata</i>   | TBA              |
| 1:00pm – 2:00pm   | <b>B CVO Implementation in Less Than One Year</b><br><i>Speakers: Renee Aird Dengler, RN, MS, CPMSM, CPCS, FMSP, Kate Stewart, Renee Zimmerman, RN,</i>   | TBA              |

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| 1:00pm – 2:00pm  | <p><b>B Making a Meaningful Huddle Report for Enrollment and Credentialing Teams</b></p> <p><i>Speakers: Neil Berry</i></p> <p>This session will show how to use conditional fields in Crystal Reports to bring attention to specific tasks or checklist items which have been delayed during enrollment or credentialing processes.</p> <p>Learning objectives:</p> <ul style="list-style-type: none"> <li>• Demonstrate how a report with conditional fields may be used for a department huddle report.</li> <li>• Discuss how to use processes as a source of bench mark data for department reports.</li> <li>• Show how to report Process and Task ID numbers in order to create a work flow report, like the huddle report.</li> <li>• Show how to set up a clean report matrix, using sub-reports.</li> <li>• Demonstrate how to use conditional formatting on individual dates to highlight dates exceeding desired turn-around time.</li> </ul> | TBA |
| 1:00pm – 2:00pm  | <p><b>B Tackling Downstream Data Flow From MSOW To Multiple Hospital IT systems</b></p> <p><i>Speakers: Suzanne Cummings, MS, CPCS, Dale Steber</i></p>   | TBA |
| 2:00pm – 2:15pm  | <b>Break</b>  | TBA |
| 2:15pm – 3:15pm  | <p><b>B After Implementation: What's Next? How to Maintain Optimized Operations</b></p> <p><i>Speakers: Vicki Searcy</i></p> <p>So you implemented your software, your organization is humming away efficiently accomplishing the current tasks at hand - how do you assure things stay this way as time wears on? Keeping your organization's operations running efficiently is an ongoing process of maintenance and review followed by constant fine-tuning. Learn from the real-life experiences of Morrissey's Vice President, Client Success Services and Consulting, Vicki Searcy. She has helped many organizations achieve optimized operations through the implementation of systems, and will share her best practices for accomplishing this task while making sure the success continues on even after implementation.</p>   | TBA |
| 2:15pm – 3:15pm  | <p><b>B Enhancement Forum: MSOW Network Management (Apogee)</b></p> <p><i>Speakers: Brandi Zevenbergen, MS, CPMSM, CPCS, MSOW-C, Scott Zoldan</i></p>   | TBA |
| 2:15pm – 3:15pm  | <p><b>B Privileging at the Point of Service</b></p> <p><i>Speakers: Wendy Crimp, BSN, MBA, CPHQ</i></p>   | TBA |
| 3:15pm – 3:30pm  | <b>Break</b>  | TBA |
| 3:30pm – 4:30pm  | <p><b>B Forms Workshop: Portal Templates and Forms Toolkit</b></p> <p><i>Speakers: Peggy Feeney, Robin Zych, MPopH-C, MHS, CPCS, MSOW-C</i></p>   | TBA |
| 3:30pm – 4:30pm  | <p><b>B Morrissey Reporting Views Directory Overview and Demonstration</b></p> <p><i>Speakers: John Coffee, Spiro Georgi</i></p> <p>The web-based interactive <b>Morrissey Reporting Views Directory (MVD)</b> system facilitates MSOW users' understanding and usage of the many MSOW reporting views. During this session, Spiro Georgi, Morrissey Business Intelligence Analyst, will provide an overview and demonstration of the MVD system and how to use it as a resource in development of ad-hoc reports required to support your organization's reporting needs. John Coffee, Senior Systems Analyst at Inova Health System, will support Spiro's presentation with real life examples of how he's utilized the tool in his reporting work.</p>   | TBA |
| 3:30pm – 4:30pm  | <p><b>B Successful Delegation: Tools and Methods to Achieve Success</b></p> <p><i>Speakers: Cheryl Cisneros, RN, BSN, CPCS, CPMSM</i></p> <p>If you are planning to seek delegation with your organization's contracted payers this is the session for you. During the program we will walk through timeline targets and requirements to obtain delegation using a tool to ensure a successful outcome.</p>   | TBA |
| 6:30pm – 10:00pm | <b>(MUST PRE-REGISTER) Customer Awards Dinner</b>   | TBA |

**AUGUST 11 • FRIDAY**

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| 8:15am – 9:00am | <b>Breakfast</b> | Crystal Ballroom |
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| 9:00am – 10:00am  | <p><b>B Health System CVO Town Hall</b></p> <p><i>Moderators: Renee Aird Dengler, RN, MS, CPMSM, CPCS, FMSP</i></p> <p>The focus of this session will be an open discussion regarding topics relative to health system Credentials Verification Organizations (CVOs). Bring your topics!</p>  | TBA |
| 9:00am – 10:00am  | <p><b>B Introducing MSOW University!</b></p> <p><i>Moderators: Robin Zych, MPopH-C, MHS, CPCS, MSOW-C</i></p> <p><i>Speakers: Adam Miller</i></p> <p>Come check out our brand new e/learning curriculum, <b>MSOW University</b>, from Adam Miller, E/learning Instructional Specialist.</p> <p>Objectives:</p> <ul style="list-style-type: none"> <li>• Learn about the plans for our new online e/learning curriculum, MSOW University</li> <li>• See a live demonstration of MSOW University</li> <li>• Understand how this new online program can benefit your organization</li> </ul> | TBA |
| 9:00am – 10:00am  | <p><b>B MSOW Conditions Manager</b></p> <p><i>Speakers: Vicki Searcy</i></p>  | TBA |
| 10:00am – 10:15am | <b>Break</b>  | TBA |
| 10:15am – 11:15am | <p><b>B Morrisey Privileging Solution: Tips and Tricks for Current Subscribers</b></p> <p><i>Speakers: Jackie Jones, CPMSM</i></p>  | TBA |
| 10:15am – 11:15am | <p><b>B MSOW Help Desk Q&amp;A</b></p> <p><i>Speakers: Bryan Coyle, Rob Hirsh</i></p> <p>Join us for an opportunity to be face-to-face with your MSOW help desk staff to ask them anything! You will also learn some tips and best practices for reaching out to the help desk to ensure quick timely service.</p>  | TBA |
| 10:15am – 11:15am | <p><b>B Provider Enrollment Town Hall</b></p> <p><i>Moderators: Cheryl Cisneros, RN, BSN, CPCS, CPMSM</i></p> <p>The focus of this session will be an open discussion regarding topics relative to Provider Enrollment. Bring your topics!</p>  | TBA |