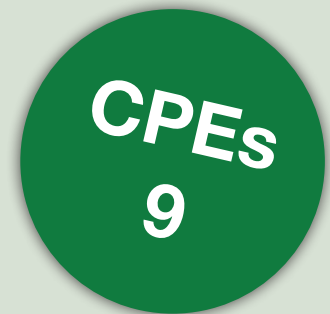


# CFO 101 WORKSHOP

October 27, 2016

**TAHFA** Texas Association for  
Healthcare Financial Administration

TIME	EVENT	TITLE & SPEAKERS
7:30 AM	<b>Registration</b>	
8:00 AM	Opening Remarks	<b>Opening Remarks</b> Renaë Thomas, FACHE, Thomas & Thomas Financial Consulting
8:10 AM	Session 1	<b>The Path to Becoming CFO – Building Your Leadership Strengths and Your Career for Healthcare’s Future</b> Stefan Werdegard, Vice President, Coker Group; and Mary Anne Davis, President, Peak Performance Solutions
9:50 AM	Break	<b>Networking Breaks</b>
10:05 AM	Session 2	<b>Are You Ready for CMS Mandatory Bundled Payments? There are 3 Ways in Which a Provider can Improve Their Situation</b> Maria Miranda, FACHE, Director of Reimbursement Services, BESLER Consulting
11:00 AM	Session 3	<b>CFO Panel: What You Wish You Would Have Known in the Beginning</b> Renaë Thomas, FACHE, Thomas & Thomas Financial Consulting; Shelly Miland, CPA, MHA, FACHE, FHFMA, VP Finance/Group Finance Officer, Texas Health Fort Worth, Cleburne, Azle, Specialty Hospital; James McNatt, VP of Finance/Hospital Chief Financial Officer, Baylor Scott & White Medical Center – Carrollton; John Moore, Executive VP/Chief Financial Officer, Parkland Health & Hospital System Moderator: Vicki Dale, Texas Regional Executive, Texas Hospital Association
11:50 AM	<b>Lunch</b>	
12:20 PM	Session 4	<b>Board Reporting/Financial Reporting – The Essentials You Need to Know</b> Renaë Thomas, FACHE, Thomas & Thomas Financial Consulting; and Tommy Davis, Durbin & Company, LLP
1:15 PM	Session 5	<b>Monthly/Quarterly Balance Sheet Reconciliations and Contractual Allowances</b> Renaë Thomas, FACHE, Thomas & Thomas Financial Consulting; and Tommy Davis, Durbin & Company, LLP
2:10 PM	Break	<b>Networking Breaks</b>
2:25 PM	Session 6	<b>Eligibility and Point of Service Collection Practices that Work</b> Douglas Turek, Sr. VP of Operations, Alegis Revenue Group, a MedData Company
3:20 PM	Session 7	<b>Excel for CFO’s</b> Ramachandra Phatak, MHA, MBBS, Reimbursement Analyst, Parkland Hospital & Renaë Thomas, FACHE, Thomas & Thomas Financial Consulting
4:10 PM	Session 8	<b>Making Sense (Not Cents) of Your Cost Report</b> Mike Trostel, Director, LaPorte CPA’s & Business Advisors; and Rhonda Guelker, Chief Financial Officer, Rolling Plains Memorial Hospital
5:00 PM	Closing	<b>Closing</b> Vicki Dale, Texas Regional Executive, Texas Hospital Association
5:15 PM		<b>Networking Event TBD</b>



## TICKET PRICING:

TAHFA & HFMA	
Member Rate .....	<b>\$249.00</b>
Non-Member Rate .....	<b>\$350.00</b>
Road Show Sponsorship .....	<b>\$500.00</b>
Student .....	<b>\$50.00</b>
Sponsorship .....	<b>\$250.00</b>

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# SPEAKER LIST



## Mary Anne Davis

Drawing from her own business expertise, skills and training, Mary Anne started Peak Performance Solutions® in 1994. Today, the company is as dynamic as she is. Mary Anne is nationally recognized as a sales and management consultant and trainer. She helped her Blue Chip list of clients achieve bottom line results. Some have been voted best place to work and others fastest growing companies. Her clients are from various industries. She is the author of The Sales Messenger: Ten Lessons for Sales Success in Your Business and

Personal Life. Mary Anne is a graduate of Western New England College, Springfield MA where she studied business and focused on marketing.



## Tommy Davis

Tommy comes to us with over 16 years of accounting and consulting experience, primarily in healthcare. Tommy has been involved in public accounting and has been involved with hundreds of financial statement audits for proprietary, not for profit, and public hospitals. Tommy was a shareholder and Audit Director for Parrish Moody & Fikes, PC, based in Waco, Texas. Tommy's experience allows him to provide various financial accounting & consulting

services. Tommy is a member of HFMA. Tommy is a graduate of New Mexico State University, with a BBA in Accounting. Tommy is a CPA.



## Rhonda Guelker

Rhonda Guelker began her career with Rolling Plains Memorial Hospital in 1992 as an Assistant Controller. She was appointed to the CFO position in May 2006. Prior to that, she worked in public accounting for 4 years. Besides her financial responsibilities at the hospital, she also serves as the HIPAA Security Officer, Information Security Officer, Chair of the Information Management Committee and the HIPAA Committee, and is in charge of Meaningful Use Certification and 1115 Waiver Activities. Ms. Guelker received her

Bachelor's degree in Accounting from Angelo State University in 1988 and obtained her CPA license in 1990. Rhonda has been on the TAHPA Board of Directors as a director, Treasurer, and two terms as President. She has also served on the Education Committee, Membership Committee, and Audit Committee.



## Maria Miranda

Maria has 25 years of progressive experience in healthcare administration. Her background includes Budget & Reimbursement, Contract Negotiations, Network Development, Credentialing and Denials Management. Maria has been with Besler Consulting for 3 years. Prior to that, she worked as Northeast Regional Director of Network Development for a National Preferred Provider Organization based out of NYC. She has worked for several provider organizations in both NY and NJ including Liberty Health, Westchester Medical

Center, Hospital for Special Surgery, and Memorial Sloan Kettering. Maria holds a Bachelor's in Health Care Administration from St. John's University and a Master of Public Administration from Fairleigh Dickinson University. Maria is a longstanding member of the Health Care Financial Management Association and a Fellow of the American College of Health Care Executives. Maria currently serves as an Executive Board Member for ACHENJ.



## James McNatt

James McNatt Jr. is currently serving as the VP of Finance/Hospital Chief Financial Officer at Baylor Scott & White Medical Center – Carrollton. He has been in his current position for almost 4 years. Prior to joining Baylor Scott & White, James was the VP of Finance/CFO for the Hospital Division of USMD. Prior to USMD, James spent 10 years in various roles at Texas Health Resources. James graduated from the University of North Texas with a BS/MS in Accounting and has been a CPA since 1998.



## Shelly Miland

Shelly Miland began her career in healthcare in August 1979 while still in High School. Thinking she would be a physical therapist, she took a job in the hospital accounting office and never left healthcare finance. She worked in several healthcare facilities in Oklahoma until her relocation to Texas in 1989. She began her employment with Texas Health Resources in 1998 at Texas Health Dallas, then progressed from Manager to Director at Texas Health Fort Worth in 2001. Shelly became Vice President of Texas Health HEB

hospital in 2005, assuming responsibility for finance, accounting, and oversight of Springwood Psychiatric hospital, a separately licensed 50 bed hospital on the HEB campus. In 2007, she advanced to Vice President of Finance at Texas Health Arlington Memorial Hospital and assisted as the hospital converted all hospital systems to THR standard systems and opened Texas Health Heart & Vascular Hospital a 48 bed hospital within a hospital on the THAM campus. In 2014, Shelly returned to Texas Health Fort Worth as Vice President and Group Finance Officer. In her current role as Group Finance Officer, she is responsible for Texas Health Fort Worth, Cleburne, Azle, and Specialty Hospital. Shelly has a BA in Accounting from The University of Central Oklahoma, a Master's in Healthcare Administration from The University of Texas Arlington. She is a CPA and is a Fellow in the American College of Healthcare Executives and a Fellow in Healthcare Financial Managers Association.



## John Moore

CPA, joined Parkland in January 2015 from Carolinas HealthCare System in Charlotte, North Carolina, where he served as Vice President/Chief Financial Officer since 2008. There he was responsible for financial operations, patient accounting, Health Information Management, patient access, information systems, communications and wound care. Prior to that, Moore was Chief Financial Officer at Northwest Medical Center Oro Valley in Tucson, where he was responsible opening and staffing all financial-related areas of a

de novo hospital. Moore also has served as Senior Financial Analyst for Triad Hospitals, Inc., in Plano; Chief Financial Officer at Samaritan Surgicenters of Arizona in Phoenix; and accounting manager for HCA-The Healthcare Company in Dallas. Moore earned a Bachelor of Business Administration degree from Baylor University. He is a Certified Public Accountant, and a member of the Healthcare Financial Management Association.



## Ramachandra Phatak

Being a physician, I was quizzed over my entry into corporate structure and pure business field (Supply Chain Management). I have made most of the opportunity by accomplishing two major career leaps to current position in just 15 months. I was able to be creative and develop a thought process based on efficiency and effectiveness. Striving for continuous self-improvement, I was able to successfully apply those principles to my work. The unique mix of knowledge, education, skills and experiences instructs to think out-of-box

with the sole aim of improvement in processes and quality. Always approached by colleagues to help in understanding MS Excel and Access, I always taken pride and efforts in helping everyone who comes knocking as since my school days I believe in "Teaching is learning Twice". I can confidently call myself as an Ever Learning Super User of MS Excel and Access as these both programs surprise me with their amazing capabilities and ever expanding boundaries. These lead to mastering the creation custom formulas and equations using diligent thought process and out of box thinking to innovate, enhance functionality, efficiency and effectiveness. Looking for an opportunity that would fully utilize all my capabilities, medical knowledge and experience, analytical thought process and crave to succeed. Aims to improve the quality of healthcare for patients and stakeholders. Aspire to make use of all the experience to essentially apply and increase acceptance and value of healthcare quality measures.



## Renae Thomas

Renae Thomas, a native Texan, is a graduate of Stephen F. Austin State University with an MBA from Texas A&M University-Commerce. She has a broad base of experience having served in the hospital industry as well as the physician realm. Renae began her healthcare career at East Texas Memorial Hospital in Lufkin, Texas as a financial analyst preparing Medicare/Medicaid cost reports for the system and all its facilities. When her family relocated to Northeast Texas for her husband's job, she served in various financial

roles in the CHRISTUS St. Joseph's Health System in Paris, Texas. She then moved into the Controller role at Hopkins County Memorial Hospital in Sulphur Springs, Texas. Renae was also the CFO of Texas Health Presbyterian Hospital Winnsboro where she was later promoted to Administrator. Upon the sale of the facility, she entered the consulting realm and served as an interim CFO throughout Texas. She later served as the Executive Director of Employed Physician Services for Titus Regional Medical Center. The facility asked her to join them and build an employed physician model to help prepare them for the transition to having employed physicians on staff. Renae is a Past President of Texas Association for Healthcare Financial Administration (TAHFA) and served on the board of directors for 7 years. She chaired the education committee for 4 years and served on the committee for 9 years. She is also a member of the Medical Group Management Association (MGMA) and is a Fellow in the American College of Healthcare Executives (ACHE).



## Mike Trostel

Mr. Trostel has over 30 years of experience in the healthcare industry. Prior to joining Blue & Co. Mike was the President of a healthcare consulting firm, specializing in reimbursement. He has worked in the areas of Medicare and Medicaid Reimbursement as a consultant and as reimbursement manager with two large national Healthcare corporations. Mr. Trostel's experience includes cost report preparation, re-openings and appeals, Medicare/Medicaid audit assistance, reimbursement analysis, wage index

review audits for a wide range of healthcare providers. He has also provided Medicare bad debt review, analysis, and log preparation assistance. Mike has provided State DSH and UC Tool preparation, audit, and appeals. He has sought exceptions to TEFRA target limitations and SNF routine cost limits in the past and had success in gaining relief for facilities. Additionally, Mike has sought geographic reclassifications, Sole community and CAH requests with success. He also has experience in setting up methodologies by which hospitals track their contractual allowances and their cost report receivable/payable. He has also assisted clients with hospital billing procedures, hospital logging support and review, financial proformas, and various "what-if" scenarios. Mike has also provided expert witness testimony to clients within the Reimbursement venue. Mr. Trostel earned a Bachelor's of Business Administration degree from the University of Texas at Austin in Accounting. He is a member of HFMA, AICPA, TAHFA and TORCH.



## Doug Turek

Douglas Turek has been in the healthcare receivables industry since 2001 and is currently the Senior VP of Operations for Alegis Revenue Group, overseeing all company operations. Alegis combines legal expertise and technology driven processes to maximize reimbursement on difficult to collect hospital accounts. His law firm, The Turek Law Firm, P.C., handles third party liability, denials and other types of reimbursement litigation for hospital clients across the country. Mr. Turek has been a licensed attorney in Texas for

over 19 years and is also licensed in Utah, California, Nevada, Oldahoma, Pennsylvania, Kansas, Tennessee, Missouri, and Florida.



## Stefan Werdegarr

Stefan Werdegarr is Vice President of Business Development at Coker Group. He is also part of the firm's Executive Search division. Before joining the firm Stefan was Vice President at Tyler & Company, a national healthcare retained search firm where he led their Healthcare IT executive search practice. Prior to this Stefan was in strategic client relationship management and business development roles at Siemens Healthcare. He also spent time at Allscripts (formerly Eclipsys) in a key account management position.

Prior to these positions, he spent more than seven years in enterprise information technology sales with Unisys, a worldwide IT services and technology company. Stefan is passionate about helping organizations hire the right executive talent. He has worked with clients including community hospitals, large IDNs, physician organizations, Private Equity firms, HIT/Revenue Cycle vendors and related companies. He is a frequent speaker and moderator on leadership, career development and hiring at a number of industry events (regional and national) including HIMSS, ACHE, HFMA and The Texas Association for Healthcare Financial Administration. He has taught career development classes at The University of Texas Austin and St. Edward's University Austin. Stefan also enjoys providing career coaching for executives in a number of areas in healthcare, sales and technology. Stefan is a member of the American College of Healthcare Executives (ACHE), Healthcare Financial Management Association (HFMA) and Healthcare Information and Management Systems Society (HIMSS). He served as Vice President of Education and Vice President of Programs for Sales & Marketing Executives International of Dallas (SMEI), a 12,000-member global nonprofit association. He is also an alumni member of Pi Sigma Epsilon, a national sales and marketing organization, where he held leadership and board positions.