

TELCOR RCM User Conference

2024 RCM USER CONFERENCE

CHECKMATE

Strategic moves for mastering your revenue cycle

Learning
strategic moves
for mastering your
revenue cycle.

October 13-15, 2024
Omaha, NE

 **TELCOR**[®]



Strategy: the art of devising or employing plans or stratagems toward a goal

This year's Checkmate theme seemed fitting because with every turn you take to improve your reimbursement strategy, it seems there are outside influences creating new obstacles.

Our teams stay in touch with our customers, industry experts, and influencing organizations to ensure we can share the right moves to help labs continue their growth and profitability.

Last year, we added panel discussions in addition to the presentation given by Danielle Tangorre. This year, we are excited to offer even more panel discussions and presentations from industry experts with strengths and experience in many different specialties.

In conjunction with TELCOR sessions, several roundtable discussions to learn from your peers, and workshops with hands-on learning, you will leave this year's conference with new insights and strategies on best practices to give your lab the advantage needed to claim "checkmate" against your strongest adversaries.

Chris Terrano
President, RCM

Kwami Edwards
Chief Operating Officer

More Industry Information

Industry Presentations

- ◇ MoIDx and Z-Identifier Codes: Why, How, and the Future
- ◇ Clarifying the Chaos: Insight and Guidance on Reimbursement Regulations
- ◇ Political Crystal Ball: 2024 Congressional Landscape and 2024 Election Outlook

Panel Discussions

- ◇ Key Updates and Challenges in the Laboratory Industry
- ◇ Mastering Market Access and Payer Contracting for Laboratory Success
- ◇ Optimizing Billing Operations: Strategies for Prior Authorization, Appeals, and Medical Records Management

Roundtable Discussions

- ◇ Exploring Prior Authorization Dynamics
- ◇ Navigating the Blues
- ◇ Optimizing Pre-Claim Processes
- ◇ Mastering UnitedHealthcare

WHAT WERE YOUR TOP TWO TAKEAWAYS?

"LOVED BRINGING IN OUTSIDE PEOPLE FOR COMPLIANCE, LEGAL, AND INDUSTRY TRENDS."

**- DIRECTOR, REVENUE CYCLE
2023 ATTENDEE**

Day 1 Agenda

Sunday, October 13, 2024

| Start | End | Event |
|-------|------|---|
| 4:00 | 5:30 | Casual networking in the lobby area of the Omaha Hilton bar for all TELCOR User Conference attendees. |
| 6:00 | 8:30 | Hosted buffet dinner at the Charles Schwab Field Clubhouse. Casual attire. Come and go as your schedule allows. |

Monday, October 14, 2024

| Start | End | Type | Session | Room |
|-------|-------|------|--|------------|
| 7:30 | 8:30 | | Registration and Continental Breakfast | JB 203-204 |
| 8:30 | 8:45 | | TELCOR State of the Union | JB 203-204 |
| 8:45 | 9:45 | | Keynote Speaker | JB 203-204 |
| 10:15 | 11:00 | | Product Direction | JB 203-204 |
| 11:15 | Noon | | Enhancing Lab Productivity: Embracing New Tools and Techniques | JB 201 |
| | | | Mastering Market Access and Payer Contracting for Laboratory Success | JB 202 |
| Noon | 1:15 | | Lunch | JB 203-204 |
| 1:15 | 2:00 | | Optimize Patient and Client Interactions with RCM's Cutting-Edge Solutions | JB 202 |
| | | | Unlocking Revenue Potential: Navigating the Changing Reimbursement Landscape | JB 201 |
| 2:15 | 3:00 | | Optimizing Workflow Through Integration Reengineering | JB 202 |
| | | | Adapting to Change: Exploring New Rules | JB 201 |
| 3:15 | 4:00 | | Political Crystal Ball - 2024 Congressional Landscape and Election Outlook | JB 203-204 |
| 4:15 | 5:00 | | Meeting for all TELCOR RCM Users | JB 202 |
| 5:30 | 6:30 | | Open Reception at Holland Performing Arts, Ovarions Bar & Lounge | |
| 6:30 | 10:00 | | Dinner and Entertainment at Holland Performing Arts, Scott Recital Hall | |

Day 2 Agenda

Tuesday, October 15, 2024

| Start | End | Type | Session | Room |
|--------------------------------|-------|----------|--|------------|
| 8:15 | 8:45 | Novice | Early Bird Session: Daily, Weekly, Monthly Reports to Implement Immediately | JB 202 |
| | | Advanced | Early Bird Session: How WDL Uses Cost Per Test to Measure Profitability and Drive Decisions | JB 201 |
| 8:00 | 9:00 | General | Hot Breakfast | JB 203-204 |
| 9:00 | 9:45 | General | Clarifying the Chaos: Insight and Guidance on Reimbursement Regulations | JB 203-204 |
| 10:00 | 10:45 | General | Key Updates and Challenges in the Laboratory Industry | JB 203-204 |
| 11:00 | 11:45 | General | Optimizing Billing Operations: Strategies for Prior Authorization, Appeals, and Medical Records Management | JB 202 |
| | | Advanced | Streamlining Payer and Claim Management Processes | JB 201 |
| Noon | 1:00 | General | Lunch | JB 203-204 |
| 1:00 | 1:45 | General | Roundtable: Optimizing Pre-Claim Processes | MR 209 |
| | | General | Roundtable: Navigating the Blues | MR 210 |
| | | Novice | Workshop: Mastering Data Reporting for Business Success (1 of 2) | MR 205 |
| | | Novice | Workshop: Maximizing Revenue Through Effective Claim Appeals (1 of 2) | MR 206 |
| 2:00 | 2:45 | General | MolDx and Z-identifier Codes: Why, How, and the Future | JB 202 |
| | | Advanced | Ensuring Compliance with Effective Import and Configuration Management | JB 201 |
| 3:00 | 3:45 | General | Roundtable: Exploring Prior Authorization Dynamics | MR 209 |
| | | General | Roundtable: Mastering UnitedHealthcare | MR 210 |
| | | Advanced | Workshop: Mastering Data Reporting for Business Success (2 of 2) | MR 205 |
| | | Advanced | Workshop: Maximizing Revenue Through Effective Claim Appeals (2 of 2) | MR 206 |
| 4:00 USER CONFERENCE CONCLUDES | | | | |

- General information; appropriate for all skill levels
- Novice information; designed for newer users
- Advanced information; designed for more experienced users

Monday Session Descriptions

State of the Union

Chris Terrano, President, RCM; Kwami Edwards, Chief Operating Officer

Chris and Kwami welcome attendees to the conference and provide a brief update on TELCOR.

Excelling & Enduring in a Changing World

Julio Melara, Keynote Speaker

Julio will share strategies for excelling and enduring in a rapidly evolving world, focusing on adaptability, continuous learning, and resilience. By examining real-life examples and practical techniques, we'll uncover how individuals and organizations can thrive amidst change and uncertainty.

TELCOR Product Direction Presentation

Wendy Baehne, Product Management, Vice President; Brandon Effle, Customer Engagement, Vice President

Discover the newest version enhancements as well as what's on the roadmap in future versions. This information helps users understand the importance of submitting version enhancements as well as how the new version can positive impact collections, workflow, and profitability.

Enhancing Lab Productivity: Embracing New Tools and Techniques

Alexis Determan, Implementation Analyst; Brittany Duryea, Senior Implementation Analyst

In this session, you will learn how to elevate productivity within your lab using the latest advancements. From automating billing processes to accessing documentation effortlessly for special projects, we'll cover a range of strategies to streamline operations. Learn how to create custom processes tailored to your lab's needs and leverage new workqueues to refine workflows. Join us as we unlock the potential for enhanced efficiency and profitability in your lab. Attendees will:

- Review how to use Tasks and how next steps are easily communicated to team members using them.
- Review new and updated workqueues to further automate daily work, including the Manage Account Workqueue, Requisition Workqueue, Error Workqueue, Coding Workqueue, Claim Metrics and more.
- Batch Update Tools to take bulk actions against transactions, payments.

Mastering Market Access and Payer Contracting for Laboratory Success

Brian Burns, Lighthouse; Lauren Feldman, ADVI; Lena Chaihorsky, ALVA10; Brent Gibbs, CareDx

In an ever-evolving healthcare landscape, understanding how to effectively manage market access and negotiate payer contracts is paramount for laboratories seeking sustainable growth and success. Our panelists will share their experience, insights, and strategies, offering attendees perspectives on overcoming challenges and seizing opportunities. From identifying key stakeholders to optimizing reimbursement strategies, this session will equip attendees with actionable knowledge to thrive in the competitive laboratory industry. Learning objectives:

- Market Access Insights: Gain insight into the evolving landscape of market access within the laboratory industry, including emerging trends, challenges, and opportunities.
- Successful Payer Contracting: Understand the critical components of successful payer contracting for laboratory services, from contract negotiation tactics to reimbursement optimization strategies.
- Best Practices and Innovative Approaches: Learn best practices and innovative approaches from leading laboratory industry experts for enhancing market access and navigating payer relationships to drive business growth and profitability.

Optimize Client and Patient Interactions with RCM's Cutting-Edge Solutions

Bryce Petersen, Senior Customer Engagement Manager; Kurt Matthes, Vice President, Service & Reengineering

Discover how the TELCOR RCM innovative suite of tools can revolutionize your patient and client interactions. With iLabBill Account, Quick Pay, and Client, streamline processes for smoother transactions and enhanced collections. Utilize the RCM PSC Portal to inform patient interactions and drive collections effectively. Access key performance indicator (KPI) reports seamlessly from your mobile device or PC with the RCM Executive

Monday Session Descriptions (Continued)

Portal, empowering both you and your executive team. Elevate efficiency and boost your bottom line with these powerful solutions from RCM. Attendees will:

- Revisit the basics of each product offering.
- Learn about new features for these products.
- Recognize the value add of each product.

Unlocking Revenue Potential: Navigating the Changing Reimbursement Landscape

Sarah Stewart, Vice President, Revenue Cycle Services; Darla Wanitschke, Director, Customer Success

In an evolving reimbursement landscape, ensuring optimal revenue management is paramount. Join us as we explore the crucial metric that determines whether you're maximizing revenue potential or leaving money on the table. Amidst these changes, two vital questions emerge: Are you accessing pertinent information precisely when needed? And are your analytics empowering you to manage your business with utmost effectiveness? Delve into strategies to address these questions and seize opportunities for enhanced revenue management. Attendees will:

- Learn how payer requirements affect reimbursement and show ways to determine if your processes are effective or if they need to change.
- Have be able to determine which appeals are worth pursuing by understanding cost versus success.
- Know what to track to set yourself up for maximum reimbursement.
- Realize how productivity reports provide deeper insight into operational costs and how this information can impact your overall profitability.

Optimizing Workflow Through Integration Reengineering

Anita Calvert, Special Project Manager; Sean Moser, Special Project Manager

Leveraging technology to streamline workflow is essential for maintaining success and maximizing collections. With the expansion of technology and the availability of various tools, organizations have unprecedented opportunities to integrate and automate their operations. This session focuses on exploring the latest integration opportunities designed to streamline workflow effectively. Attendees will gain actionable insights into:

- Current Integration and API Opportunities: Discover the latest integration and API solutions that can significantly enhance operational efficiency and streamline workflow processes.
- Patient Account Inbound Interface Updates: Restructured for resiliency, performance, and a accountability. Coupled with enhanced options for Account management.
- Document Management Module: Ongoing enhancements that promote ease of use and overall management of your documents in RCM.
- Lockbox interfaces and workqueue updates.

Adapting to Change: Exploring New Rule

Craig Lenhoff, Director, Customer Engagement; Bart Rooney, Implementation Analyst

Client, payer, and patient needs can change frequently in the dynamic landscape of healthcare. In this session, attendees will uncover some of the latest updates and enhancements that will assist their teams in meeting these evolving needs. Key topics covered:

- New Processing Rules: Gain insights into the latest processing rules designed to streamline operations and improve efficiency in adapting to changing requirements.
- New Payer Rules: Explore the new rules specific to payers implemented enabling your team to stay compliant and effectively manage payer relationships.
- Prior Authorization: Learn about the enhancements for prior authorization processing rule.

Monday Session Descriptions (Continued)

Political Crystal Ball: 2024 Congressional Landscape and Election Outlook

Erin Will Morton and Meghan Riley, CRD Associates

This presentation offers timely insights into the current political landscape, the upcoming election, and their potential impact on laboratories. Participants will gain a deeper understanding of how political changes and election outcomes can affect regulatory policies, funding, and operations within the laboratory industry.

Key topics covered:

- **Current Political Landscape:** Analyze the latest developments in the political arena and their implications for the healthcare and laboratory sectors.
- **Upcoming Election:** Explore the key issues and candidates in the upcoming election and how their platforms may influence laboratory policies and funding.
- **Impact on Laboratories:** Understand the potential effects of political and election outcomes on laboratory operations, including regulatory changes, funding opportunities, and compliance requirements.

Meeting for all User Group Members

It is important to be an active user group member to help network with all customers, drive product direction through enhancements, and establish group information sharing opportunities through phone calls, discussion board comments, webinars, events, and more. Be sure to attend this meeting to have a say in the growth of your user group. Cocktails provided.

Tuesday Session Descriptions

Early Bird Session: Daily, Weekly, Monthly Reports to Implement Immediately

Sally Barnard, Director, RCM Service; Angie Di Salvo, Senior Analyst

Start your morning off by learning about the routine monitoring of revenue cycle process, covering daily, weekly, monthly, bi-annual, and annual activities. Attendees will gain valuable tips and tricks for entry-level reporting, ensuring effective management and optimization of revenue streams. Learning objectives:

- Understand the importance of daily, weekly, monthly, bi-annual, and annual monitoring in optimizing the revenue cycle process of a clinical laboratory.
- Learn practical strategies and techniques for efficiently monitoring various aspects of the revenue cycle, from billing and collections to financial reporting.
- Gain proficiency in utilizing entry-level reporting tools and techniques to identify revenue trends, discrepancies, and opportunities for improvement within the laboratory's financial operations.

Early Bird Session: How WDL Uses Cost Per Test to Measure Profitability and Drive Decisions

Robin Herbner and Alfred Sumrall, Wisconsin Diagnostics Laboratories

The team from WDL will share how they are using the cost per test functionality within TELCOR RCM from a business perspective. This includes analyzing client profitability, making better pricing decisions, and as an analytics tool for the corporate finance team.

Clarifying the Chaos: Insight and Guidance on Reimbursement Regulations

Danielle Tangorre, Partner, Robinson + Cole

This year once more, Danielle Tangorre will offer valuable insights and guidance on the current state of affairs regarding laboratory operational and compliance issues, federal and state fraud and abuse laws, and reimbursement and billing compliance.

Key Updates and Challenges in the Laboratory Industry

Danielle Tangorre, Robinson+Cole; Danielle Sloane, Bass Berry & Sims; Caitlin Forsyth, Davis Wright Tremaine LLP; Jondavid Klipp, Laboratory Economics

Join us for a dynamic discussion featuring leading experts as they provide crucial updates on the

Tuesday Session Descriptions (Continued)

laboratory industry. Engage with industry leaders to stay informed and prepared for the evolving challenges and opportunities in the laboratory sector. This panel will cover a range of essential topics, including:

- **Regulatory Compliance:** Explore the latest regulations and compliance requirements impacting laboratories.
- **Fraud and Abuse Guidance:** Gain insights into current fraud and abuse guidelines to safeguard your operations.
- **Federal Investigations:** Understand the scope and implications of federal investigations within the industry.
- **Commercial Payer Audits:** Learn about the processes and best practices for managing commercial payer audits.
- **Privacy and Security:** Discuss the importance of maintaining privacy and security in laboratory data handling and operations.

Optimizing Billing Operations: Strategies for Prior Authorization, Appeals, and Medical Records Management

Ann Lambrix, GoPath; Jessica Kennedy, Castle BioSciences; Sarah Stewart, TELCOR

From navigating the labyrinth of prior authorization requirements to employing effective claim appeal tactics, our panelists will offer invaluable insights and practical advice. Moreover, we'll explore the latest developments in biomarker legislation, discussing implications for laboratories and strategies for compliance and adaptation. Whether you're a seasoned professional or new to the industry, this session will provide a comprehensive understanding of these crucial topics to empower you in your laboratory reimbursement strategies. Learning objectives:

- **Prior Authorization Landscape:** Understand the current landscape of prior authorization for laboratory services, including common challenges, regulatory requirements, and strategies for streamlining the process to improve operational efficiency.
- **Effective Claim Appeal Strategies:** Explore effective claim appeal strategies for laboratory services, including best practices for navigating denials, maximizing reimbursement, and mitigating financial losses.
- **Biomarker Legislation Developments:** Gain insight into the latest developments in biomarker legislation affecting the laboratory industry, including regulatory updates, compliance considerations, and strategies for staying current with evolving state legislative requirements to ensure optimized workflow and reimbursement.

Streamlining Payer and Claim Management Processes

Kristin Drahota, Special Project Manager; Taryn Shotkoski, Senior Implementation Analyst

Managing the intricate requirements of claims and payers can be incredibly time-consuming. Manual oversight of processes leads to reduced productivity and increased Days Sales Outstanding (DSO). Version 24.1 introduces additional functionality designed to streamline these processes, saving valuable time and enhancing efficiency. In this session, attendees will gain a comprehensive overview of the latest updates in version 24.1 aimed at optimizing payer and claim management processes. Key topics include:

- **Updated 277 Claim Rules:** Explore the enhanced 277 claim rules, including a new error type and the ability to use them without an assigned company, simplifying claim management.
- **Enhanced Electronic Remittance Tools:** Discover the improvements made to electronic remittance tools, including updates to appeal status options, strengthening your ability to manage remittance information effectively.
- **Claim Management Enhancements:** Learn about the expanded functionalities in the Claim Error and Claim Appeal workqueues, along with other enhanced tools to facilitate smoother workflow management.

Tuesday Session Descriptions (Continued)

Group Discussion: Optimizing Pre-Claim Processes

Participate in a discussion covering aspects of your pre-claim processes. From demographic data management to charge error handling, we'll delve into challenges and explore strategies for improvement. Discover how automation can alleviate the heavy lifting in your workflow, streamlining operations, and boosting efficiency.

Group Discussion: Navigating the Blues

Embark on a collaborative journey centered around navigating the complexities of the Blues. Together, we'll explore strategies for meeting compliance requirements, monitoring reimbursement trends, and enhancing collection efforts. Join us as we pool our expertise to uncover effective solutions and optimize your operational success.

Workshop: Mastering Data Reporting for Business Success

Mary Harms, Education Analyst; Katie Remington, Senior Implementation Analyst; James Swapp, Training Coordinator

This workshop is a two-part series. The first part, Reporting 101, will begin by refreshing your knowledge, sharing general updates to the reporting features and functions, and building a baseline of understanding for the second session, Reporting 201. You do not have to attend the first session in order to attend the second session.

Data is vital for performing your job effectively, monitoring your team, and understanding your business. Join us in this comprehensive workshop to gain an essential overview of reporting basics, explore common reports to monitor daily, weekly, or monthly, and discover advanced tips for customizing your reporting outputs. Workshop objectives include:

- Refresh your knowledge on reporting principles to ensure accurate and efficient data analysis.
- Learn which reports are crucial for daily, weekly, and monthly monitoring to keep your business operations on track.
- Acquire expert tips and tricks for customizing your reports to meet specific needs and export data more effectively.

Workshop: Maximizing Revenue Through Effective Claim Appeals

Ben Bevins, Senior Implementation Analyst; Kristin Drahotka, Special Project Manager; Natalie Helkenn, Senior Lead, Claims Resolution

This workshop is a two-part series. The first part, Managing Appeals 101, will begin by refreshing your knowledge, sharing general updates to the appeals management features and functions, and building a baseline of understanding for the second session, Managing Appeals 201. You do not have to attend the first session in order to attend the second session.

In today's landscape, claims appeals have become a routine task for laboratories. Failing to appeal low payments or denials can significantly impact revenue potential. Moreover, inefficient appeals processes can inflate operational costs. This workshop aims to equip attendees with the essential knowledge and tools to optimize their claims appeals processes and enhance revenue cycle workflow. Workshop objectives include:

- **Setting Up Claim Appeals Processes:** Learn the fundamental steps to establish efficient and effective claim appeals processes within your laboratory.
- **Basics of Revenue Cycle Workflow:** Acquire essential insights into revenue cycle workflow management to streamline operations and improve financial performance.
- **Integration of Document Management:** Understand the advantages of integrating document management, such as TELCOR's solution, into your workflow to enhance efficiency and accuracy.
- **Leveraging Reporting for Success:** Discover how to utilize reporting tools to measure appeal success and identify areas for improvement in your revenue cycle management.

Tuesday Session Descriptions (Continued)

Moldx and Z-identifier Codes: Why, How, and the Future

Megan Landsverk, Scientific Director, Moldx, Chief Science Officer, Palmetto GBA

This presentation will provide an in-depth overview of the Moldx program, highlighting how it sets a precedent for reimbursement for molecular diagnostic testing. Attendees will gain insights into the purpose and history of Z-identifier codes, their implementation and usage by payers, and the overall impact on claim processing. Key topics covered:

- Purpose and History of Z-identifier Codes: Understand the origin and development of Z-identifier codes and their role within the Moldx program.
- Implementation and Usage by Payers: Learn how these codes are applied by payers in the reimbursement process for molecular diagnostic tests.
- Impact on Claim Processing: Discover the effects of Z-identifier codes on claim processing, including how they streamline operations and ensure accurate reimbursement.

Ensuring Compliance with Effective Import and Configuration Management

Nathan Foley, Senior Implementation Analyst; Amanda Harms, Senior Analyst

In the complex world of billing and reimbursement, keeping up with data imports and compliance configurations is crucial, yet often overlooked. Properly managing these tasks is essential to maintain compliance and streamline operations. This session will provide attendees with the knowledge and tools needed to effectively handle imports and configurations, ensuring a smooth and compliant workflow. Key topics covered:

- Streamlining Payer Information: Review the current import options available to streamline payer and payer contact information, simplifying your data management processes.
- Enhanced Client Configurations: Discover new import functionalities for client configurations, including invoice rules, notification rules, and client classifications, to optimize your operational efficiency.
- Advanced Auditing with New Configuration Framework: Learn about the new configuration framework designed to work seamlessly with advanced auditing features, enhancing your ability to maintain compliance and track changes.

Workshops: Mastering Data Reporting for Business Success & Maximizing Revenue Through Effective Claims Appeals: See descriptions on previous page.

Group Discussion: Exploring Prior Authorization Dynamics

We'll dive into the ever-evolving landscape of prior authorization requirements, including pertinent state biomarker rules. Navigate through the challenges inherent in this process and explore strategies for seamless integration into your team's daily workflow. Gain valuable insights, share experiences, and collaborate on innovative solutions to optimize your prior authorization practices.

Group Discussion: Mastering UnitedHealthcare

We'll explore strategies for meeting compliance standards, monitoring reimbursement trends, and optimizing collection efforts. Dive into the challenges unique to navigating UnitedHealthcare and uncover effective solutions to enhance your operational success. Join us to gain valuable insights and collaborate with industry leaders in overcoming obstacles and maximizing profitability.

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KEYNOTE: JULIO MELARA **Excelling & Enduring in a Changing World**

Julio will share strategies for excelling and enduring in a rapidly evolving world, focusing on adaptability, continuous learning, and resilience. By examining real-life examples and practical techniques, we'll uncover how individuals and organizations can thrive amidst change and uncertainty.

SAVE THE DATES:

OCTOBER 12-15, 2025
SEPTEMBER 20-22, 2026

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2024 RCM USER CONFERENCE

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Strategic moves for mastering your revenue cycle

