

MIDWEST



# Spring

2017 MEETING

**MARCH 31 AND APRIL 1, 2017**

The Lodge at Old Kinderhook | Camdenton, MO (Lake Ozark)

## WE ARE MORE THAN JUST A BILLING COMPANY



REVENUE CYCLE  
MANAGEMENT



CODING EDUCATION  
AND AUDIT



MARKETING  
SERVICES



PRACTICE MANAGEMENT  
& CONSULTING

## PARTNER WITH HIS FOR:

### Maximized Reimbursements:

HIS clients typically see an increase of 7-15% or more in their average reimbursements.

### Focused Expertise in Orthopedics:

30+ years of experience with a specific focus on Orthopedics with a dedicated Orthopedic Division.

### Increased Profitability:

We partner with each client to understand your business intimately creating a more successful, stable, & profitable future.



**MARCH 31 AND APRIL 1, 2017**

The Lodge at Old Kinderhook | Camdenton, MO (Lake Ozark)

### 2016 - 2017 MIDWEST AAOE BOARD OF DIRECTORS

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Advanced Orthopaedic Associates  
Wichita, KS

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*Sue Meyers*

Orthopaedic Management Services  
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**MISSOURI STATE REP:**

*Jan Vest*

Signature Medical Group  
St Louis, MO

**OKLAHOMA STATE REP:**

*Mark Galliant*

McBride Orthopedic Hospital Clinic  
Oklahoma City, OK

### ACCREDITATION STATEMENT

This program has been approved for a total of 7.0 CEU's from the American Association of Professional Coders (AAPC).



# Spring MEETING AGENDA

March 31 and April 1, 2017 | The Lodge at Old Kinderhook, Camdenton, MO (Lake Ozark)

## FRIDAY, MARCH 31ST

<b>Golf Outing</b> .....	8:30 am
<b>Registration</b> .....	2:00-5:30 pm
<b>Welcome</b> .....	3:00 pm
<i>Mary Wine</i> President, Midwest AAOE	
<b>GENERAL SESSION 1</b>	
Moderator: <i>Mary Wine</i>	
<b>Benchmarking and Analytics:</b>	
<b>From Data to Dollars</b> .....	3:00 -4:00 pm
<i>John R. McClary, CPA</i> Somerset CPA	
<b>Ongoing Lessons with Bundled</b>	
<b>Payment Programs</b> .....	4:00-5:00 pm
<i>Jan Vest</i> Signature Medical Group St Louis, MO	
<b>Drinks/Appetizers</b> .....	5:00-6:00 pm
<b>Dinner</b> .....	6:00-7:30 pm
<i>Sponsored by Bactes Imaging Solutions</i>	
<b>Networking/Social</b> .....	7:30-10:00 pm

## SATURDAY, APRIL 1ST

<b>Breakfast</b> .....	7:45-8:00 am
<b>GENERAL SESSION</b> .....	8:00-9:15 am
<b>Keynote Speaker:</b>	
<b>Reimbursement Hot Topics:</b>	
• <b>Cigna vs. Humble ERISA Case and Implications for Out-of-Network Services</b>	
• <b>Workers Compensation Underpayment Actions</b>	
<i>Richelle Marting &amp; Quentin Templeton</i> Forbes Law Group	
<b>Business Meeting</b> .....	9:15-9:30 am
<b>Vendor Break</b> .....	9:30-10:00 am
Location:	
<b>BREAKOUT SESSIONS</b> .....	10:00-11:00 am
<b>BREAKOUT #1: - ADMINISTRATOR TRACK</b>	
<b>HIPAA Vulnerabilities: State Legal Actions &amp; Orthopaedic Exposure</b>	
<i>Richelle Marting &amp; Quentin Templeton</i> Forbes Law Group	

## BREAKOUT #2: - CLINICAL MANAGER TRACK

<b>DME Compliance and Collections</b>	
<i>Zach McLeese</i> Titan Medical	
<b>Vendor Break</b> .....	11:00-11:30 am
<b>GENERAL SESSION</b> .....	11:30-12:15 pm
<b>Future of Health Reform and Regulation Post-Election</b>	
Moderator: <i>Joel James</i>	
Panelists:	
<i>Brad Coffey, AAOE</i>	
<i>Manthan Bhatt, AAOS</i>	
<b>Integrated Physical Therapy Services in Missouri</b> .....	12:15-12:30 pm
<b>Update on Legislative Initiative</b>	
Moderator: <i>Joel James</i>	
Panelists:	
<i>Brad Coffey, AAOE</i>	
<i>Manthan Bhatt, AAOS</i>	
<b>Lunch &amp; Open Forum</b> .....	12:30-1:30 pm
<b>Vendor Break</b> .....	1:30 - 2:00 pm
<b>GENERAL SESSION</b>	
<b>Don't forget the Ground You Stand On:</b>	
<b>Returning a Focus on Real Estate</b> .....	2:00-2:30 pm
<i>Mark Gallart</i> McBride Orthopedic Hospital Clinic, Oklahoma City, OK	
<b>Focus on MACRA and MIPS</b>	
<b>Measure Selection and Tracking Outcomes</b> .....	2:30-3:30 pm
<i>Josh Mosier</i> Quality Improvement Advisor Kansas Healthcare Collaborative	
<b>Panel Discussion</b> .....	3:30-4:00 pm
<b>Physician &amp; Staff Engagement/Patient Reported Outcomes/Measure Management</b>	
<b>Panel Discussion:</b>	
<b>Meeting Adjourned</b> .....	4:00 pm
<b>Entertainment and Dinner</b> .....	7:00-10:00 pm
Location: The Trophy Room	

# Speaker BIOS

## BRAD COFFEY, MA

Government Affairs Manager  
AAOE



Bradley Coffey, MA is the Government Affairs Manager at the American Alliance of Orthopaedic Executives in Indianapolis, Indiana. For the past three years, Bradley has worked with AAOE volunteers to build the AAOE's department of government affairs. He received his Master of Arts in political

science with a focus on the institutions of American government (Congress, Presidency, Courts) in May 2013. While a graduate student, Bradley served as a graduate teaching assistant, Vice-President of the Graduate Student Union, and as the Social Science Representative to the Academic Grievance and Student Discipline Committee. Bradley has previously worked with the

National Multiple Sclerosis Society's Public Policy Office and the Kentucky General Assembly.

In 2014, Bradley guided AAOE to be named "Outstanding Government Affairs Program" for associations with a budget over \$750,000 at the Indiana Society for Association Executives' Star Awards. In 2016, Bradley received his Credential of Readiness (CORE) from the Harvard Business School and ISAE's "Rising Star of the Year" award. In 2017, he will start classes at the Harvard University John F. Kennedy School of Government's executive education program in political organizing.

Bradley lives in Indianapolis, Indiana and is active in his community serving in volunteer roles with the Alzheimer's Association Indiana Chapter and the Indiana Society of Association Executives.

## MANTHAN BHATT

State Government Affairs Manager  
American Academy of Orthopaedic Surgeons



Manthan Bhatt is the state government affairs manager for the American Academy of Orthopaedic Surgeons. He's lobbied hundreds of bills and has overseen or lead the passage of 27 state legislative wins. He is most known for creating Colorado's universal purchasing program for childhood vaccinations, Medicaid ACO reform and protecting access to care. In his free time, he plays hockey and has a drone.

## JOEL JAMES, MA

Director of Public and Government Affairs  
Signature Medical Group, Inc.



Joel James is Director of Public and Government Affairs for Signature Medical Group, Inc., an independent multi-specialty physician group based in St. Louis, Missouri, where he oversees external communications, marketing, media and government relations. He previously headed external and government

relations for the Federal Reserve Bank of St. Louis and also managed congressional and media relations for the Resolution Trust Corporation in Dallas, Texas, and in Washington, D.C. Joel's military service includes graduating from the U.S. Army Medical Corps Clinical Specialist School at William Beaumont Army Medical Center. Stationed at the Fort Carson Military Hospital in Colorado Springs, Joel worked as a pediatric nurse and administrator of the Allergy, Immunology and Dermatology Clinic. He holds a B.A. from Buena Vista University in Storm Lake, Iowa, and an M.A. in Political Economy and Public Policy from the University of Texas. He currently serves as chair of the Advocacy Council for the American Association of Orthopaedic Executives; is a member of the Advocacy Council for the OrthoForum, and serves on the board of the Asthma and Allergy Foundation of America.

## MARK GALLIART

McBride Orthopedic Hospital Clinic  
Oklahoma City, OK



Mark Galliart has served as CEO for McBride Orthopedic Hospital and Clinic since June 2009. He is a native Oklahoman, growing up in Oklahoma City, graduating from Putnam City North High School.

Mr. Galliart obtained his Bachelor's Degree in Radiological Technology-Nuclear Medicine from the University of Oklahoma Health Sciences Center and his Master's of Science degree with an emphasis in Healthcare Administration from Oklahoma State University.

Before joining McBride Orthopedic Hospital,

Mr. Galliart served as Vice President of Business Development at Stillwater Medical Center in Stillwater Oklahoma. At Stillwater Medical Center he was responsible for all physician clinics, physician recruitment/relations, hospital/physician joint venture development, outpatient operations and strategic planning.

Mr. Galliart is married to a native Kansan, Kari Fisher, for the past twenty-four years. They have two children Clayton (20) and Emily (18). Kari is a consulting dietician and stay at home mom part time.

## RICHELLE MARTING, JD, MHSA, RHIA, CPC, CEMC, CPMA, CPC-I

AHIMA Approved ICD-10-CM/PCS Trainer  
Forbes Law Group, LLC

Richelle focuses her practice on regulatory compliance, including privacy and security, and healthcare reimbursement. She has administrative and compliance experience in the ambulatory surgery, medical group, long term care, and private practice settings with multi-specialty providers. She is a Registered Health Information Administrator and certified professional coder with first-hand knowledge of the legal and practical reimbursement structures for government and private payors. Richelle has prepared successful

appeals for WPS, RAC, and private payor claim denials, audits, and reimbursement disputes and educates providers on appropriate documentation and coding practices. Richelle has received national awards from the American Health Information Management Association and Health Information and Management Systems Society and has served as an expert in multiple reimbursement and healthcare privacy lawsuits on behalf of healthcare providers.



# Speaker BIOS

## JOHN R. MCCLARY, CPA

Somerset CPA



John is a principal in Somerset CPAs' Health Care Team. John has worked with physician groups, hospitals, ambulatory surgery centers and imaging centers on accounting system and financial statement design and implementation, physician compensation design and business strategy. In addition, he has consulted on entity structure and tax planning, tax compliance, ancillary service development and implementation, fee schedule and third-party contract review, buy-in and buy-out design, as well as employment and shareholder agreements.

John is currently the acting CFO for several large orthopedic groups and responsible for

financial statement preparation, physician compensation, budgeting, proforma preparation, cash management, as well as all tax and business compliance requirements. He oversees the financial success of the core clinical practice as well as ancillary business lines such as physical therapy, MRI, DME, surgery centers and pharmacy.

John provides tax planning and compliance services to C and S-Corporations, limited liability companies, not-for-profit organizations, estates, trusts and individuals. He specializes in working with health care and personal service organizations.

## ZACH MCLEESE, ATC

Titan Medical

Zach McLeese, ATC, joined Breg in 2009 as an implementation specialist and today serves as the Business Solutions Manager for the Central Region. He provides strategic direction to develop and grow the Business Solutions Department programs, which include: OrthoSelect, Vision DMEPOS management software, and inventory outsourcing solutions.

As industry standards and healthcare evolve, Zach maintains a keen awareness of the changes and requirements that impact his customers. Through OrthoSelect consulting, he establishes compliant, efficient, patient-friendly, in-house DMEPOS programs, resulting in increased ancillary revenue

for his customers, often higher than the industry standard.

Prior to his career at Breg, Zach was an Associate Athletic Trainer at Southern Methodist University, in Dallas, TX for nearly a decade. Serving as the primary AT for the Men's Basketball team, Zach was responsible for the preventive care, emergency services, and rehabilitation of student athletes, as well as managing the Graduate Assistant Program.

Zach holds a master's degree in Liberal Arts and a bachelor's degree in Kinesiology, with an emphasis in Athletic Training. He is a current member of the National Athletic Trainers' Association.



## JOSH MOSIER

Quality Improvement Advisor  
Kansas Healthcare Collaborative



Josh Mosier is a Quality Improvement Advisor with the Kansas Healthcare Collaborative in Topeka, KS working for the Practice Transformation Network (PTN) initiative in Kansas. He works with physician practices to assess performance and identify strategies and best practices to support clinicians in the transition of a delivery and payment system built on volume to one based on performance.

Josh previously worked as a project director for the Kansas Hospital Association (KHA), and with the American Academy of Family Physicians working with Continuing Medical Education.

Josh holds a Master of Science degree in Mass Communications, a Master's in Public Administration and a Bachelor of Science degree in Psychology, all from Kansas State University.

# Speaker BIOS

## JAN VEST, CEO

Signature Health

Jan Vest is the Chief Executive Officer of Signature Medical Group, Inc. (SMG), an independent multi-specialty group of 130 physicians in 17 specialties and over 850 employees in St. Louis, Kansas City and rural Missouri. As an awardee convener in the Center for Medicare and Medicaid Innovation's Bundled Payments for Care Improvement program, SMG is leading the largest orthopedic initiative in the country designed to improve quality of care and reduce cost in Medicare joint replacement patients. The SMG program clinically integrates 2,000 orthopedic surgeons in 26 states and 60 cities across the country. SMG is managing 45,000 total joints a year in the program. Also, through a grant received from CMMI to participate in the Strong Start for Mothers and Newborns program, SMG has successfully implemented new models of prenatal care that have reduced premature births in its population of Missouri Medicaid women by almost 50 percent. He consults with a wide

range of healthcare organizations and regularly presents to business organizations, academic leaders, physician groups and healthcare professionals throughout the country. He is a former member of the Federal Reserve's Health Care Industry Council and is currently a member of the boards of the American Association of Orthopedic Executives, the Midwest Healthcare Initiative and the Signature Healthcare Foundation. Jan was selected as the Medical Practice Executive of The Year 2015 by the Medical Group Practice Management Association (MGMA).



## QUENTIN TEMPLETON, JD

Forbes Law Group, LLC



Quentin Templeton, JD joined Forbes Law Group, LLC in May 2013. He assists medical facilities and providers in navigating complex state and federal regulations, including: privacy and security, Medicare Conditions of Payment, Meaningful Use, audit and appeal procedures, and Stark and Anti-Kickback laws. Quentin also

represents providers in administrative, state, and federal reimbursement litigation. Prior to joining Forbes Law Group, Quentin interned with the U.S. Attorney's Office, where he assisted in the federal indictment of two individuals for violations of health care fraud and abuse laws.



## EXHIBIT SHOW HOURS

### SET UP:

**FRIDAY, MARCH 31**  
3:00 to 5:00 pm (Set Up)

### SHOW HOURS:

**FRIDAY, MARCH 31**  
5:00 to 6:00 pm  
(Reception - Exhibit Area)

6:00 to 7:30pm  
(Dinner-Business Partners included)

### SATURDAY, APRIL 1

9:30 to 10:00 am  
(Break)

11:00 to 11:30 am  
(Break)

12:30 to 1:30 pm  
(Group Lunch)

1:30 to 2:00 pm  
(Break)

### BREAK DOWN:

**SATURDAY, APRIL 1**  
2:00 to 3:00

Business Partners are encouraged to participate in all meeting sessions and are encouraged to bring along a raffle prize.

## BUSINESS PARTNERS

A very special thank you to those partners that have already registered to participate in the Spring Meeting.

### Bactes Imaging Solutions

3101 SW 1st Street, Suite 21-23  
Bentonville, AK 72712  
Tel: 479-925-8375

### Blue Ridge X-Ray Co, Inc

120 Vista Blvd  
Arden, NC 28704  
Tel: 800-727-7290

### DataFile Technologies

4100 N Mulberry Drive, Suite 300  
Kansas City, MO 64116  
Tel: 816-437-9134

### Don Joy / Midwest Medical Resources

1455 Iron Street  
North Kansas City, MO 64116  
Tel: 816-891-6559

### Electromek Diagnostic Systems

412 US Highway 40 West  
Troy, IL 62294  
Tel: 618-667-6701

### Endo Pharmaceuticals

11225 S Lewis Drive  
Olathe, KS 66061  
Tel: 913-549-2887

### Exscribe

5 W 4th Street  
Bethlehem, PA 18015  
Tel: 610-419-2050

### Ferring Pharmaceuticals

100 Interpace Parkway  
Parsippany, NJ 07054  
Tel: 913-526-8518

### Healthcare Information Services

350 S NW Hwy, Suite 200  
Park Ridge, IL 60068  
Tel: 847-720-7499

### HealthiPASS

1770 Park Street, Suite 102  
Naperville, IL 60563  
Tel: 855 484 4727

### MMIC

7701 France Ave, Suite 500  
Minneapolis, MN 55435  
Tel: 402-397-5206

### Sanofi

8512 Richards Road  
Lenexa, KS 66215  
Tel: 816-509-1995

### The Neenan Company

3325 S Timberland Road, Suite 100  
Fort Collins, CO 80525  
Tel: 970-493-8747

### Titan Medical / Breg Inc

324 Winter Lake Court  
Fenton, MO 63026  
Tel: 314-596-1236

### Truss

4551 W 107th St, 3rd Floor  
Overland Park, KS 66207  
Tel: 913-341-8998

### TSI – A Transworld Systems Company

PO Box 2635  
Olathe, KS 66063  
Tel: 913-645-5453

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*Save the Date!*

**2017 MAAOE Fall Meeting**

**October 13 & 14, 2017**

**Sheraton Kansas City Hotel at Crown Center**





**MIDWEST AAOE SPRING MEETING  
PROGRAM COMMITTEE**

**Dani Aitken**

OrthoKansas, LLC  
Lawrence, KS

**Nicole Dorrell**

Advanced Bone & Joint  
St Peters, MO

**Jerald "Jerry" Forrester, MBA, FACMPE**

Steindler Orthopedic Clinic  
Iowa City, IA

**Corinne Rice**

OrthoKansas, LLC  
Lawrence, KS



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