

# Education Sessions

EDUCATION SESSIONS do not have prerequisites/pre-work unless otherwise noted within their descriptions.

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▶ This icon designates sessions that will be live-streamed or audio-streamed and recorded for the **NACHC Online Library**.

## Tuesday, October 24

9:30am – 6:30pm  
EXPO Hall Open

Rivoli A-C

10:00am – 11:00am  
Refreshment Break in EXPO Hall

Rivoli A-C

## 11:00am – 12:15pm EDUCATION SESSIONS

### **ITuA1** ▶ Champagne 1-2 **Using AI and NLP Analytical Innovations to Improve SDoH Data Capture and Care Management Services at CareSouth Carolina**

CPE: 1.5      CEU: 1.25

Level: Basic

Topic: Data Strategy - SDOH Screening, Data Capture and Utilization

CareSouth Carolina, one of the largest FQHCs in South Carolina, has committed to the use of advanced, AI-enabled data analytics to optimize its capture of SDOH data and the use of this data to drive improved outcomes and impact of its care management programs. This presentation will demonstrate the process and the lessons learned through the implementation of AI analytics for SDOH data and care services optimization at CareSouth, with support from the South Carolina Primary Health Care Association (SCPHCA).

The targeted areas where AI has been used to enhance the analytics and services are as follows:

- Use of AI analytics to aggregate and combine SDOH survey data with demographic, medical, and behavioral health data to create more accurate predictive risk models for populations with significant social and healthcare disparities served by CHCs;
- Use of AI models to discover which SDOH risk factors are contributing the most to the risk for future complications and costs;
- Use of natural language processing (NLP) applied to unstructured EHR care coordination notes to completely and accurately identify SDOH risk factors and services needed to address them; and

- Use of AI models for services impactability analysis to identify the care enabling services most likely to reduce health risks and costs.

#### **Learning Objectives:**

- Understand the benefits of AI and machine learning systems for SDOH predictive risk and prescriptive care management services analysis within value-based care.
- Identify the value of accurate SDOH data capture and analysis in addressing healthcare inequities in value-based care programs.
- Describe the optimal process and steps involved in implementing an advanced AI-based SDOH analytics program in a CHC, along with the potential challenges that need to be addressed through the process.

*Moderator:*

**Nalani Tarrant, PMP, MPH**, Deputy Director, Social Drivers of Health, NACHC

*Presenter(s):*

**Gary Herrington**, Chief Information Officer, CareSouth Carolina  
**Chandra Beasley, MBA, MHRM, MNSA, MPA, CLSSGB**, Director of Information Technology and HCCN Program Director, South Carolina Primary Health Care Association  
**Huzefa Dossaji**, Analytics and VBC Consultant, South Carolina Primary Health Care Association

### **ITuB1** ▶ Champagne 3-4 **HRSA Grant Management Through the Federal Financial Reporting Process**

CPE: 1.5      CEU: 1.25

Level: Basic

Topic: Financial Sustainability - Federal Grants Management

Managing the various HRSA grants community health centers receive (Section 330, Ryan White, ARP) and tracking how these dollars are spent takes a lot of time and effort for health center finance departments. The vehicle used to report this information is the Federal Financial Report (FFR). The FFR is an important form that can be confusing at times for individuals to prepare.

The goal of this presentation will be to discuss the importance of tracking federal funds (including the review of the order of spending for the various grants), along with identifying best practices and avoiding common findings. It will also provide an overview of how to prepare the FFR properly including a walk-

## Tuesday, October 24, continued

through of the form and a review of key terminologies such as Excess Program Income, Unobligated Balances, and Expanded Authority and how they all play a role in earning and spending federal grant dollars timely and appropriately.

### Learning Objectives:

- Understanding the importance of federal grants management and tracking expenses in accordance with the regulations.
- Understand the purpose of the FFR and how to prepare it properly under the various HRSA grants CHCs receive.
- Identify best practices surrounding federal grants management and how to avoid common findings and maximize the spending of the federal grant funds.

Presenter(s):

**Steven Schwartz, CPA**, Partner, CohnReznick LLP

**Janet G. Salazar, CPA**, Senior Manager, CohnReznick LLP

### ITuC1

Concorde A-B

#### Cybersecurity in Healthcare: Managing Threats and Protecting Patients

CPE: 1.5      CEU: 1.25

Level: Basic

Topic: Technology - Cybersecurity

Join HHS to discuss Healthcare and Public Health (HPH) Sector-specific cybersecurity resources that help protect patients from cyber threats. The HHS 405(d) Program released three new initiatives that support the HPH sector in understanding the threats we face and how we can work together to mitigate them. Presenters will discuss the new Health Industry Cybersecurity Practices (HICP) publication that provides an overview of the top five threats facing the sector and the ten practices that can be used to mitigate them. The Hospital Cyber Resiliency Initiative Landscape Analysis will also be a discussion topic. It uses data from private and public partners to compare US hospital systems' cybersecurity capabilities against the most prevalent methods cyber adversaries use to break in and cause disruptive attacks, and then provides information on how to align these deficiencies to the HICP publication.

Participants will also be introduced to our new free cyber awareness education platform, Knowledge on Demand. This new platform includes multiple delivery methodologies to reach various sized health care facilities across the country. The platform includes five cybersecurity awareness trainings that align with the top five cybersecurity threats outlined in the HICP. All of these resources are free and available to the public!

### Learning Objectives:

- Identify the top five cyber threats facing the healthcare industry and the ten mitigating practices needed to fight them. These practices were developed by industry with industry in mind.
- Understand the cybersecurity landscape of US hospitals today and assess where they stand, and identify which practices need immediate attention based on current threats.

- Identify free cyber training resources that support all organization sizes and all end users. Cyber training is the first line of defense and attendees will be able to understand the importance of cyber awareness.

Presenter(s):

**La Monte Yarborough, MCS, MSIA, MCPM, CISSP**, Chief Information Security Officer, U.S. Department of Health and Human Services

**Julia Chua, PMP, CAP, CISSP**, Director, Governance, Risk Management and Compliance Division, Office of Information Security, U.S. Department of Health and Human Services

**Nick Rodriguez, MCJ**, HHS 405(d)-Aligning Health Care Industry Security Approaches Program Manager, U.S. Department of Health and Human Services

### ITuD1

Concorde C

#### It's More Than Just Pay: Recruiting and Retaining a High-Performing Workforce

CPE: 1.5      CEU: 1.25

Level: Basic

Topic: Workforce - Recruiting, Developing, and Retention of Staff

Hiring, developing, and retaining employees is one of the most pressing issues for health centers. Ensuring that you have the right staff, in the right place, to serve your patients and communities requires innovative solutions and strategies. It also requires a strong awareness of generational priorities; Justice, Diversity, Equity and Inclusion (JDEI) strategies; financial and non-financial incentives; and career pathways. Join this session to hear from health center operations and human resources leaders on how they are recruiting the best and brightest staff.

### Learning Objectives:

- Identify innovative solutions and strategies for recruiting and retaining staff.
- Describe how health centers have incorporated financial and non-financial incentives into their workforce strategy.
- Outline the impact of JDEI principles in human resource policies and strategies.

Presenter(s):

**Tina Adamson, PHR, SHRM-CP**, Vice President of Human Resources, Primary Health Network

**Isaiah Nathaniel, CPHIMS**, Vice President and Chief Information Officer, Delaware Valley Community Health, Inc.

12:15pm – 1:45pm

Rivoli A-C

Lunch and Networking Time in EXPO Hall

1:45pm – 3:00pm  
EDUCATION SESSIONS

**ITuA2** ▶ Champagne 1-2

### The Health Center Team Charting the Course to Health Equity: Appropriate Person-Centered Communication in Action

CPE: 1.5 CEU: 1.25

Level: Basic

Track: Operations

The gap between individuals' healthcare needs and the availability of equitable health pathways is a persistent challenge in society. However, by implementing person-centered strategies, we can bridge this gap and ensure that everyone has access to the healthcare they need in a fair and equitable manner.

When developing healthcare plans and pathways, person-centered strategies prioritize the individual's unique needs, preferences, and circumstances. This approach shifts the focus from a one-size-fits-all approach to a more tailored and personalized approach. By considering the person as a whole rather than just their medical condition, person-centered strategies can help identify and address barriers to equitable healthcare access.

This interactive session will introduce NACHC's white papers on patient-centered care and provide real-life examples of implementing this concept.

#### Learning Objectives:

- Understand how person-centered communication differs from traditional communication approaches and its significance in promoting patient engagement and satisfaction.
- Identify the terminology and definitions related to investing in health center pathways for equitable health and well-being.
- Explore the practical application of person-centered communication at all levels or each discipline in a community health center setting.

*Presenters:*

**Lathran J. Woodard**, Chief Executive Officer, South Carolina Primary Health Care Association

**Beth Wrobel**, Chief Executive Officer, HealthLinc

**Sue Veer, MBA**, President and CEO, Carolina Health Centers, Inc.

**Reginald Vicks, RN, BSN, MBA**, Chief Operations Officer, CrescentCare Community Health Center

**ITuB2** ▶ Champagne 3-4  
**Demonstrated Results: Creating a Positive Workplace Culture to Improve Outcomes**

CPE: 1.5 CEU: 1.25

Level: Basic

Topic: Workforce - Organizational Culture

Applying the latest research-based techniques from the field of positive psychology, health center staff across the country are learning the practices of resilient leaders; they become more adaptable and develop a capacity to "see" more opportunities, leading to better results for the staff and patients they serve. But how did they do it? In this session, learn how health center leaders leveraged Shawn Achor's Happiness Advantage curriculum, featured in NACHC's Leading Positive Team Performance workshops, to improve their workplace culture.

The data speaks for itself. North Country (NoCo) Family Health Center experienced 11.3 percent improved optimism in their staff, 30 percent improved motivation, 7.6 percent improved reduction in burnout, and a 20.7 percent improvement in the staff's ability to embrace change. Health center leaders from three organizations will share their own journeys and practical applications of embracing positivity to develop a new organizational culture that delivers big results.

#### Learning Objectives:

- Identify key results achievable through creating a positive workplace culture.
- Understand how health centers can implement positive psychology practices to achieve better results.
- Determine applicability of positive psychology practices in your own organization and the next steps to get started.

*Moderator:*

**Cindy Thomas, MS**, Director, Leadership Development and Training, NACHC

*Presenter(s):*

**Gloria Warner, MHA**, Chief Operating Officer, Beaufort Jasper Hampton Comprehensive Health Services, Inc.

**Gloria del C. Amador Fernandez, DrPH-HSAM, MHSA**, President and CEO, Salud Integral en la Montaña, Inc.

**Ada Torres**, Human Resources Director, Salud Integral en la Montaña, Inc.

**Jennifer Gourdine**, Clinical Health Informatics Specialist, Beaufort Jasper Hampton Comprehensive Health Services, Inc.

### ITuC2

Concorde A-B

#### A Health Center's Journey to Integrated Data

CPE: 1.5

CEU: 1.25

Level: Basic

Topic: Data Strategy - Data Reporting, Tools, and Templates

Health centers nationwide struggle to integrate all their data from fragmented sources in clinical, financial, and operational departments. Valley Professionals Community Health Center in Indiana had a vision to change that: breaking down data silos and uniting their data in one cutting-edge, interactive analytics platform. With support from the HRSA-funded organization HealthEfficient, Valley Professionals successfully achieved this vision. How? Now that's a story.

This presentation will detail the obstacles Valley Professionals faced in implementing its vision and will provide strategies to overcome challenges and achieve success. From defining system requirements, to managing the project, to affordably obtaining data from five vendors, to building a data warehouse to store it all, the Valley Professionals and HealthEfficient teams required patience, teamwork, and know-how. Presenters will explore Valley Professionals' two-and-a-half-year journey to streamline its systems. Valley Professionals' CEO and staff from HealthEfficient will provide a framework for integrating data sources and reporting tools into one platform. They will discuss how they met unexpected obstacles, negotiated repeatedly with vendors, automated data flow and transformation, and built interactive dashboards for the health center's board and leadership. Presenters will discuss strategies and methods that will support other health centers nationwide in replicating this success.

#### Learning Objectives:

- Develop project management strategies to promote successful creation of an integrated data analytics system.
- Recognize the technology concepts and layers needed to support an integrated data analytics system.
- Identify and engage key stakeholders in communication and collaboration to ensure the project's success.

*Presenter(s):*

**Alan Mitchell**, Executive Director, HealthEfficient

**Terry Warren, MBA**, Chief Executive Officer, Valley Professionals Community Health Center

**Jessica Jolly, MHA, MPH, NBC-HWC, CHES, CLSSGB**, Program Director, Workforce Development & Operations, HealthEfficient

### ITuD2

Concorde C

#### No Task Is Too Big When Done Together: A Year One Lookback at a Health Center Merger on Hawai`i Island

CPE: 1.5

CEU: 1.25

Level: Basic

Topic: Operations - Operationalizing Innovation

Hawai`i Island Community Health Center (HICHC) was created with the merger of two mid-sized health centers in July 2022. Presenters will retrospectively examine lessons learned from year one of the merger; with a focus on operations, human resources, and processes rooted in integrity, respect, and the unique cultural values of HICHC. "A'ohe hana nui ke alu 'ia": No task is too big when done together by all, a Hawaiian proverb, describes the approach used to facilitate the operational components of the merger between the West Hawai`i Community Health Center and Bay Clinic, both located on Hawai`i Island.

Five areas will be reviewed during this presentation: (1) guiding principles and theory to structure merger strategy; (2) partnerships, possibilities, and programmatic capacity building; (3) workforce analysis, planning, and company culture post-merger; (4) areas of operational risk and mitigation strategies; and (5) the role of governance and strategic planning. Real-life scenarios, challenges, and successes will be shared within the context of each of the five areas. Presenters will highlight the importance of interdisciplinary teams and taking a strengths-based approach to healthcare delivery in our diverse, rural community while staying grounded in the CHC Mission.

#### Learning Objectives:

- Explore guiding principles and theoretical framework in merger strategy.
- Understand the role of community partnerships in capacity building.
- Examine areas of operational risk and mitigation strategies in a merger.

*Presenter(s):*

**Victoria Hanes, PsyD**, Chief Operating Officer, Hawai`i Island Community Health Center

**Marcie Saquing, MSW**, Chief Administrative Officer, Hawai`i Island Community Health Center

**Steven Pine, DDS**, Chief Dental Officer, Hawai`i Island Community Health Center

**Kateryna Petriyenko**, Director, Human Resources Department, Hawai`i Island Community Health Center

**Lee-Ann Heely, DM**, Director, Health Equity Department, Hawai`i Island Community Health Center

3:00pm – 3:45pm

Refreshment Break in EXPO Hall

Rivoli A-C

3:45pm – 5:00pm  
EDUCATION SESSIONS

**ITuA3** ▶ Champagne 1-2  
**Becoming a Performance-Driven Organization: A Case Study in Sustaining Patient-Centered Outcomes**

CPE: 1.5 CEU: 1.25

Level: Basic

Topic: Workforce - Organizational Culture

The pandemic's lingering effects on health center operations, workforce culture, and staff burnout have made it challenging to refocus on what is needed to prepare for future Alternative Payment Models (APMs). This often feels unattainable with the day-to-day challenges of running a health center in our current fee-for-service (FFS) world. This workshop will include a case study of one organization with 13 locations - Open Door Community Health in Humboldt County, California.

Open Door underwent a massive workforce development project with a focus on leadership development and process improvement to shift their culture towards one that was outcomes-based and better poised to care for patients in an APM world. The results? They increased patients per hour by 6 percent to improve access to care in their area, reduced their cycle times by 25 percent to improve patient experience, and improved work-life balance by increasing same-day charting completion rates to 72 percent by end of day. Attendees will learn tactics to achieve a measured shift to a performance-driven culture, focused on innovation, and how to sustain their improvements over time using data and new leadership tactics. Attendees will leave this workshop with an understanding of the roadmap to success.

**Learning Objectives:**

- Define key indicators, the definition of each indicator, and how to measure performance.
- Explore tactics to improve each of the key indicators and prepare for APMs.
- Identify the leadership behaviors needed to make these process improvements successful.

*Presenter(s):*

**Tory Starr, MSN, PHN, RN**, President and CEO, Open Door Community Health

**Trisha Cooke, MA**, Director of Workforce Development, Open Door Community Health

**Amanda Laramie**, COO and Trainer, Coleman Associates

**ITuB3** ▶ Champagne 3-4  
**Enabling Data-Driven Care Through Improved Governance, Interoperability, and Analytics**

CPE: 1.5 CEU: 1.25

Level: Basic

Topic: Clinical Informatics - Health Information Technology Policy and Governance

As healthcare organizations strive to provide modern, evidence-based care, the role of HIT systems becomes increasingly critical. However, the effective implementation and utilization of HIT systems are often hindered by challenges in interoperability, usability, data sharing, governance, and analytics. This session aims to address this issue by exploring strategies and best practices in community health centers' HIT systems for improved patient care outcomes and analytics.

Participants will delve into the key issues of HIT systems, including data collection, storage, sharing, analysis, and clinical decision support. Through case studies and real-world health center examples, attendees will gain insights into the potential pitfalls and common errors that can hinder optimization. The workshop will also highlight innovative approaches, such as interoperability, data governance, and user-centered design, that can significantly enhance precision in practice. Attendees will have the opportunity to engage in collaborative discussions and problem-solving in HIT related to EHR optimization, change management, data governance, and others.

**Learning Objectives:**

- Identify key challenges and potential pitfalls in the implementation and utilization of HIT systems in CHCs.
- Apply strategies and best practices in HIT systems, including interoperability, data governance, and user-centered design, to enhance evidence-based practice and improve patient care outcomes.
- Develop practical solutions and action plans for optimizing HIT systems in CHCs, focusing on areas such as EHR optimization, change management, and data governance.

*Presenter(s):*

**AnnMarie Overholser, MD**, Medical Informaticist - Family Medicine, OCHIN

**Michele Whitt, MD, MS, MBA, FACOG**, Obstetrician/Gynecologist and Medical Informaticist, OCHIN

### ITuC3

Concorde A-B

#### Finance Forecasting and Strategic Planning: Navigating the Financial Implications of Key Decisions

CPE: 1.5      CEU: 1.25

Level: Basic

Topic: Financial Sustainability - Budgeting

In today's ever-changing healthcare landscape, financial forecasting and strategic planning are vital for the long-term success and sustainability of community health centers. As the CFO, it is crucial to have a clear understanding of the financial implications associated with key decisions. This session will examine the thought process of the CFO when important issues are proposed during board meetings.

Presenters will explore specific scenarios to illustrate the significance of considering financial implications when making critical decisions. They will also examine the potential impact on the balance sheet when opening a new clinic over a five-year period. Additionally, they will assess the consequences of bringing dental services in-house, outsourcing billing, and integrating a mental health provider into the center's services.

While acknowledging that financial considerations are just one aspect of the decision-making process, this session emphasizes the pivotal role they play. By providing real-life examples, presenters will showcase instances where CFOs either strategically thought ahead or neglected to do so, thereby affecting the community health center's outcomes.

#### Learning Objectives:

- Discuss the goals of strategic and financial planning.
- Analyze market considerations that CHCs should consider during the strategic planning process.
- Identify common key performance indicators that should be monitored related to CHC financial success.

*Moderator:*

**Gervean Williams, MS, MIT**, Director, Finance Training and Technical Assistance, NACHC

*Presenter(s):*

**Jeffrey Allen, CPA**, Partner, FORVIS

### ITuD3

Concorde C

#### Leveraging an AI Solution To Get Providers Home for Dinner

CPE: 1.5      CEU: 1.25

Level: Basic

Topic: Workforce - Employee Well-Being

Dragon Ambient eXperience (DAX) is an artificial intelligence-powered, voice-enabled, ambient clinical intelligence tool to document patient care. This session will explore one health center's experience with implementing this technology as a tool to decrease provider burnout and improve retention.

#### Learning Objectives:

- Identify signals of provider burnout.
- Articulate the benefits of DAX for providers and health centers.
- Describe characteristics of clinicians who will most benefit from DAX.

*Moderator:*

**Nalani Tarrant, PMP, MPH**, Deputy Director, Social Drivers of Health, NACHC

*Presenter(s):*

**Margaret Wheeler**, Vice President of Operations and Quality, Family First Health

**Marie Kellett, MD**, Family Physician, Family First Health

5:00pm – 6:30pm

Rivoli A-C

Conference Reception in EXPO Hall

## Wednesday, October 25, continued

10:00am – 10:30am Rivoli A-C  
Refreshment Break in EXPO Hall

10:15am  
**NACHCopoly** Prize Drawing in EXPO Hall at NACHC Booth (#411)  
(You must be present to be eligible to win prizes at the drawing.)

### 10:30am – 11:45am EDUCATION SESSIONS

#### **IWA1** ▶ Champagne 1-2 **Revenue Cycle Management Starts with Scheduling**

CPE: 1.5 CEU: 1.25

Level: Basic

Topic: Financial Sustainability - Revenue Cycle

The revenue cycle comprises processes other than billing and collecting. The billing department is often the focus of the revenue cycle process; however, many functions occur before the claim reaches the billing department to bill and collect on claims effectively. Factors that affect the health center's ability to receive revenue for services rendered are often controlled by scheduling, registration, information technology, personnel, and providers.

This training, co-presented with a health center Capital Link has worked with to implement revenue cycle management (RCM) strategies effectively, will provide an overview of the factors influencing the revenue cycle and ways to consider improving the process. This presentation will provide a comprehensive view of the revenue cycle and the importance of each individual function to the whole. An effective revenue cycle requires that all functions be integrated and operate well in order for a claim to be paid properly and on time; your revenue cycle will only be as good as each of the individual processes. The strength or weakness of each function can make or break the entire process.

#### **Learning Objectives:**

- Review the various aspects of the revenue cycle and the importance of each role in a successful model.
- Discover influences (internal and external) on health center RCM and strategize ways to improve or strengthen the RCM process.
- Determine ways to improve processes that result in more efficient workflows in each revenue cycle role.

*Presenter(s):*

**Beth Edwards, MSN, RN, CNL, CPNP-PC, EDAC**, Director, Project Consulting, Capital Link  
**Elvia Sanchez, MPH**, Chief Operations Officer, ParkTree Community Health Center

#### **IWB1** ▶ Champagne 3-4 **Transforming Health Center Culture: Shared Experiences in Fostering Alignment Between Health Center Departments to Strengthen Health Center Operations**

CPE: 1.5 CEU: 1.25

Level: Basic

Topic: Other Health Center Essentials

While both are vital to the success of a health center, operations and finance teams and their workstreams are often separated and isolated from each other. The integration of finance and operations teams will lead a health center on a pathway to excellence. This session will provide a practical guide for changing organizational culture to integrate finance and operations teams. Successful interdisciplinary collaboration of finance and operations with health center clinical teams will also be discussed.

Health center leaders, who have engaged in organizational transformations to create collaborative and meaningful relationships across teams and amongst leaders, will outline their journeys during this process. They will discuss best practices for building and sustaining relationships between operational and financial leadership and teams, creating workflows for operations and finance staff to best work together and with other departments, and developing strong communication pathways and systems to support the teams. The goal of this session is to help organizations develop workforce habits that support an interdisciplinary culture change and penetrate beyond leadership to embed in the fabric of the health center so best practices will continue beyond leadership changes.

#### **Learning Objectives:**

- Assess workflows for areas where operations and finance teams can cooperate, and systems can be integrated.
- Identify opportunities to improve communication and workflows between operations and finance teams.
- Create an implementation plan to improve the health center's performance.

*Presenter(s):*

**Rebecca Stauffer**, Manager, CohnReznick  
**Susan Sleigh, MPA, LPN**, Chief Operating Officer, Family Health Center of Worcester  
**Yinka Fadahunsi, DBA, MBA, MSF, PMP**, Chief Financial Officer, Family Health Center of Worcester

## Wednesday, October 25, continued

### IWC1

Concorde A-B

#### From Data to Impact: Understanding HIT Interoperability Policies and HRSA UDS+ Reporting for Data-Driven Decision-Making

CPE: 1.5

CEU: 1.25

Level: Basic

Topic: Clinical Informatics - UDS+ and Reporting

This session provides comprehensive updates on HRSA's Uniform Data System reporting initiative and the HIT interoperability policies implemented by the Office of the National Coordinator for Health IT (ONC). Attendees will gain insights into the recent Health Data, Technology, and Interoperability: Certification Program Updates, Algorithm Transparency, and Information Sharing (HTI-1) proposed rule introduced by the ONC, aligned with the 21st Century Cures Act, which aims to promote interoperability and transparency in health data. The session highlights key provisions of the HTI-1 proposed rule, including updates to the certification program, information blocking regulations, and the adoption of advanced standards.

Attendees will also explore the UDS+ Modernization Initiative, focusing on important aspects such as reporting modernization, content review, and stakeholder engagement. Moreover, the session delves into the UDS+ Initiative, which expands the UDS reporting by augmenting health center-level data with de-identified, patient-level data, aligning with the Fast Healthcare Interoperability Resources standards.

Session participants will be updated on the progress of the UDS Test Cooperative, contributing to a comprehensive understanding of the UDS+ reporting initiative. Throughout the session, the importance of HIT interoperability and UDS+ reporting in enabling data-driven decision-making will be emphasized. Attendees will gain valuable knowledge and insights, enabling them to leverage these initiatives to improve patient outcomes and enhance program effectiveness.

#### Learning Objectives:

- Understand and interpret the key provisions of the HTI-1 proposed rule and its impact on HIT interoperability and transparency in health data.
- Develop strategies to leverage the UDS+ Modernization Initiative for reporting modernization, content review, and stakeholder engagement in your organization.
- Acquire practical knowledge on implementing the UDS+ Initiative, including the integration of de-identified, patient-level data and adherence to FHIR interoperability standards, enabling you to enhance data-driven decision-making and improve patient outcomes in your health-care setting.

*Presenter(s):*

**Matthew Rahn**, Deputy Director, Standards Division, Office of the National Coordinator for Health Information Technology  
**Andrew Hamilton, RN, BSN, MS**, Chief Informatics Officer and Deputy Director, AllianceChicago

### IWD1

Concorde C

#### Navigating Value-Based Care: Strategies for Contract Negotiation, Implementation, and Lessons Learned

CPE: 1.5

CEU 1.25

Level: Intermediate

Prerequisite: Participants will need at least five years health center finance experience.

Topic: Financial Sustainability - Value-Based Care

This session will provide an overview of a value-based care (VBC) delivery model, highlight the difference between Fee-for-Service and VBC models, and offer insight into VBC contract negotiation, infrastructure planning, and implementation. Healthcare leaders will share their experiences and challenges, as well as lessons learned regarding this care delivery model; and attendees will have an opportunity to engage in Q&A with presenters.

#### Learning Objectives:

- Understand VBC delivery models.
- Identify VBC infrastructure required to be successful.
- Develop the skills to approach and engage in VBC contract negotiations.

*Presenter(s):*

**Vernicka Porter-Sales, DO, FAAP**, Chief, Population Health and Performance Services, Legacy Community Health

**Benjamin Stewart, MBA**, Chief of Staff, Legacy Community Health

**Cassie Lindholm, MPA, PCMH CCE**, Deputy Director, Quality Center, NACHC

11:45am – 1:15pm

Lunch on your own

1:15pm – 2:30pm

## EDUCATION SESSIONS

### IWA2

Champagne 1-2

#### Developing, Implementing, and Refining In-House Clinical Training Programs

CPE: 1.5

CEU: 1.25

Level: Basic

Topic: Workforce - Recruiting, Developing, and Retention of Staff

This session will address the development of in-house training programs in order to fill key roles in the organization. Learn how one health center established its own pipelines for critical roles in its organization by utilizing student rotations, residency programs, and in-house clinical training programs such as homegrown dental assistants, medical assistants, and pharmacy technician programs.



### Learning Objectives:

- Maximize student rotations to serve as a pipeline for providers in your organization.
- Fill key roles in your organization by utilizing a homegrown training program for pharmacy technicians, dental assistants, and medical assistants.
- Understand how to develop a standardized supervisory development training program in order to increase education amongst supervisors and managers in the organization.

Presenter(s):

**Matthew Bertsch, PharmD, 340B ACE**, Director of Education, Sun Life Health

### IWB2 Champagne 3-4 Cybersecurity Strategies to Secure Health Center Operations

CPE: 1.5      CEU: 1.25

Level: Basic

Topic: Technology - Cybersecurity

With the rise in cyberattacks of government agencies and large-scale companies, organizations large and small are questioning if they are doing all they should to protect their data. Security breaches, fines, and audits create a complexity of challenges for health centers to navigate. Join us for an interactive and engaging session on cybersecurity led by a health center IT leader.

### Learning Objectives:

- Identify the basic tool sets required to protect an organization from cybersecurity risks.
- Cultivate a culture of security awareness in your organization.
- Perform practical exercises to know what to do WHEN, not IF, a data breach occurs.

Presenter(s):

**Isaiah Nathaniel, CPHIMS**, Vice President and Chief Information Officer, Delaware Valley Community Health, Inc.

### IWC2 Concorde A-B Building Operational Resiliency Against Climate Change and an Unreliable Power Grid

CPE: 1.5      CEU: 1.25

Level: Basic

Topic: Operations - Emergency Management/Preparedness

Climate change is a main driver for intensifying natural disasters and other extreme weather events that cause widespread power outages that affect both patient health and community health center services. Without reliable access to electricity, CHCs are unable to provide necessary services, forcing health centers to lose hundreds of thousands of dollars. Populations that have been systematically marginalized are disproportionately affected by climate change and rely heavily on the ability of CHCs to remain resilient, especially in emergency situations.

Recently, the U.S. Centers for Medicare & Medicaid Services released a categorical waiver permitting emergency power to be supplied by sources other than a generator, including a solar microgrid system. Microgrids are innovative pieces of technology that can connect and disconnect from the grid and utilize a battery storage system that allows health centers to tap into stored energy while continuing as fully operational. In this session, CrescentCare Community Health Center and Community Health Access to Resilient Green Energy (CHARGE) partners will discuss the benefits of installing solar microgrids and backup battery systems and how this turnkey solution helps health center operations and patient care all while reducing carbon emissions.

### Learning Objectives:

- Understand the importance of building health center and community resilience in the face of a changing climate and unreliable power grid.
- Identify health center benefits and intended outcomes for installing solar microgrid and backup battery systems.
- Discuss opportunities for identifying, financing, and installing solar microgrids at health centers, especially based on recent policies like the Inflation Reduction Act.

Presenter(s):

**Rebecca Regan, MBA**, Chief Executive Officer, Capital Link  
**Andrew MacCalla, MPP**, Co-Founder and CEO, Collective Energy

**Reginald Vicks, MBA, RN, BSN**, Chief Operations Officer, CrescentCare Community Health Center

**Julia Dempsey, MPH**, Program Associate, Environmental Health, NACHC

### IWD2 Concorde C Health Center Credentialing and Enrollment: Avoidable Negligence

CPE: 1.5      CEU: 1.25

Level: Basic

Topic: Financial Sustainability - Revenue Cycle

In today's complex healthcare landscape, successful provider enrollment is crucial for payors and community health centers. This session will delve into the multistep enrollment process for payors, exploring its variations and discussing strategies for navigating the process effectively. Additionally, we will explore how technology can be leveraged to optimize provider enrollment and streamline the overall workflow.

Join this session to enhance your knowledge of provider enrollment, compliance, and billing practices. By optimizing enrollment processes and ensuring compliance, community health centers can mitigate liabilities, maximize revenue, and prevent potential legal issues resulting from inadequate enrollment practices.

## Wednesday, October 25, continued

### Learning Objectives:

- Understand the varying multistep enrollment process and gain insights into tailoring your own enrollment strategies accordingly.
- Gain insights into compliance requirements and identify practical approaches to adhere to these guidelines effectively.
- Understand the role of the Council for Affordable Quality Healthcare (CAQH) in provider enrollment.

Presenter(s):

**Ray Jorgensen, MS**, Consultant, Ray Jorgensen Consulting, LLC

2:30pm – 3:00pm Registration O/D A&B Foyer  
Refreshment Break

### 3:00pm – 4:15pm EDUCATION SESSIONS

#### IWA3

##### The Federal Audits of the Present

Champagne 1-2

CPE: 1.5 CEU: 1.25

Level: Intermediate

Prerequisite: At least five years of finance experience.

Topic: Financial Sustainability - Federal Grants Management

While working to respond to the COVID pandemic, health centers received a tremendous amount of support. This support came in the form of grant funds, provider relief payments, and other resources. It is important that health centers approach all of the funds available to them, now and into the future, with the mindset that it is not if, but when federal auditors will review health center use of these funds and records because reconciliation and accountability will come.

During this session, presenters will review the administrative requirements attached to federal funding and discuss the recent results of COVID grant audits completed by the HHS Office of Inspector General (OIG) to assist health centers with preparing and maintaining auditable records related to all of their federal funding.

### Learning Objectives:

- Review HHS OIG and Division of Financial Integrity audit work plans of grant funds to understand how audits of COVID-19 stimulus funds were approached.
- Discuss the results of the recently completed OIG audits of health center COVID grant funds (May 2023).
- Identify financial management requirements of health center financial records to refresh knowledge surrounding record keeping and the use of grant funds.

Presenter(s):

**Jeffrey Allen, CPA**, Partner, FORVIS

**David Fields, CPA**, Partner, FORVIS

**Catherine Gilpin, CPA**, Managing Director, FORVIS

#### IWB3

Champagne 3-4

##### Innovating Together: Collaborative Strategies for Optimizing Electronic Health Records Systems (Interactive Session)

CPE: 1.5 CEU: 1.25

Level: Basic

Topic: Clinical Informatics - EHR Reporting and Systems Integration

This interactive session focuses on collaborative strategies to optimize electronic health record (EHR) systems. Presenters will address common challenges in EHR systems, such as interoperability, data integration, user interface design, and regulatory compliance. Real-world case studies and best practices will be shared, emphasizing successful collaborative approaches. Key topics include interdisciplinary collaboration, human-centered design, standards and interoperability, data governance and privacy, and change management strategies.

Through interactive discussions and exercises, attendees will have the opportunity to share experiences and insights. By the end of the session, participants will gain practical knowledge on how to improve EHR systems through collaboration and innovation. The session aims to foster a more efficient, user-friendly, and patient-centric future for EHRs. Join us in exploring collaborative strategies to optimize EHR systems and drive transformative change in healthcare organizations.

### Learning Objectives:

- Identify key challenges and pain points in EHR systems, such as interoperability issues, data integration complexities, and user interface design limitations.
- Apply collaborative strategies to address EHR system optimization, including interdisciplinary collaboration, human-centered design principles, and standardized data formats and protocols.
- Develop practical skills in change management techniques to overcome resistance to change, train staff, and engage stakeholders in the process of EHR system optimization.

Presenter(s):

**Nicole Kemper, MPH**, Vice President, Clinovations Government + Health

**Phillip Stringfield, MS**, Manager, Health Center Operations Training, NACHC

**IWC3** ▶

Concorde A-B

### **Leaving No Stone Unturned: The Quest for Excellence in Health Center Pharmacy Programs**

CPE: 1.5

CEU: 1.25

Level: Basic

Topic: Operations - Pharmacy Operations (340B, Contract Pharmacy, Integration Clinical Pharmacy Models, Pharmacy Residency Programs)

This session will address the importance of pharmacy services in a primary care medical home and the essential role 340B plays in enabling health centers to provide patients with comprehensive services. The basics of the program will be covered briefly to familiarize attendees who are new to 340B. Discussion will also include the ongoing assaults on the 340B program, and the resulting challenges health centers are facing. Experts will share how health centers are pivoting – both strategically and operationally – leaving no stone unturned and seizing every opportunity to best serve their patients and the communities that depend upon them.

The session will conclude with a discussion of strategies at the state and federal levels to support legislative and policy initiatives that protect the integrity of the 340B program and the value it brings to the patients and communities served.

#### **Learning Objectives:**

- Explain the challenges in the health policy and pharmacy marketplace and the impact on health center pharmacy programs.
- Outline opportunities for health centers to align strategy and operations in order to optimize the care of patients and service to communities.
- Discuss legislative and health policy strategies to protect the 340B program, and the importance of the health center advocacy message.

*Presenter(s):*

**Sue Veer, MBA, CMPE**, President and CEO, Carolina Health Centers, Inc.

**David W. Christian, RPh**, Pharmacy Director, Central Virginia Health Services, Inc.

**IWD3** ▶

Concorde C

### **From Disparities to Parities: How One LA Community Health Center Leveled the Healthcare Playing Field**

CPE: 1.5

CEU: 1.25

Level: Basic

Topic: Operations - Operationalizing Innovation

Are you tired of hearing about how the pandemic has set back progress in healthcare? Well, we've got a story that will restore your faith! This session will focus on how one health center in LA survived the pandemic and thrived by implementing operational improvements that had a cascading effect on their finances, staff satisfaction, and patient satisfaction. But that's not all – this health center also saw a dramatic decrease in health access disparities, proving that a focus on efficiency and effectiveness can go hand in hand with achieving equity in healthcare. Don't miss out on this feel-good success story!

Attendees will learn tactics to improve health access disparities by improving no-show rates, productivity, and missed opportunities. Leave this workshop with an understanding of the roadmap to success and concrete tactics that can be implemented immediately to improve disparities, operations, and patient access at your healthcare organization.

#### **Learning Objectives:**

- Define key indicators of access to care, the definition of each indicator, and how to measure disparities for these indicators.
- Explore tactics to improve health access disparities.
- Identify the leadership behaviors needed to make these process improvements successful.

*Presenter(s):*

**Ernesto Barahona**, Chief Development Officer, St. John's Community Health

**Wendy Moncada, LCSW**, Associate Director of Dramatic Performance Improvement Initiative, St. John's Community Health

**Adrienne Mann, RN, BSN**, Chief Innovation Officer, Coleman Associates