

+ education in action

2011 educational series brochure

our approach

Cleverley + Associates is happy to share its hospital industry expertise in a speaking capacity through our “Education in Action” series. Our staff collectively boasts vast experience on the following topics:

- Improving Medicare profitability
- Developing justifiable and profitable pricing
- Leveraging performance metrics to enhance profitability
- Analyzing market-specific indicators of the hospital industry
- Answering top questions for healthcare financial management
- Recovering missed reimbursement via improved coding and billing



In addition, our extensive hospital databases allow us to create custom presentations to address relevant issues in your market.

Whatever your executive educational needs, we have a suitable platform, from 1-hour web-based educational sessions to board presentations to full-day seminars.

Not only will we travel on-site to deliver our educational component, but each of our presentations incorporates hospital-specific data.

Top-notch education delivered by industry experts that leverage the power of your hospital’s data - this is how we consistently deliver bottom line: absolute value.

our programs

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education in action

Cleverley + Associates is pleased to present our 2011 seminar series: Education in Action. Each year, we present at national and regional professional association meetings, executive board retreats, industry roundtables, and instructional webinars. Our work in education began with thirty years of graduate-level instruction in healthcare finance by our president, Bill Cleverley. These roots continue to drive our commitment to the education of healthcare professionals today.

We would enjoy the opportunity to work with your group to provide a valuable education program. Our current list of session topics appears below. The sessions are categorized into three primary areas:

1. Healthcare financial management
2. Hospital pricing and reimbursement issues
3. Performance measurement and enhancement

Following the descriptions of the education sessions, you will find information on our firm, our speakers, and how to reach us to discuss your upcoming education program. Thank you for your interest in our educational series.

+ Topics in Healthcare Financial Management

on-site or webinar

Ten Critical Questions for Healthcare Financial Management

DESCRIPTION

This session will identify ten critical financial questions that are often raised by healthcare boards and executives. The questions address areas of financial performance, profitability and cash targets, and facility-level operational issues of overall cost and price defensibility. The presentation will address each question using actual case-hospital data.

EDUCATIONAL OBJECTIVES

- 1) To highlight ten critical questions frequently asked by US hospital governing boards
- 2) To determine relevant financial metrics to help answer the question
- 3) To illustrate how the use of comparative benchmarking can impact current and future organizational performance

Going Green: Strategies for Financial Sustainability

New for 2010!

DESCRIPTION

In an increasingly challenging operating environment, healthcare executives need to focus on fundamentals to ensure financial viability. Critical in this process is the understanding of current financial position, the creation of realistic financial targets, and the identification of performance improvement areas. This session will address these issues with the following objectives:

EDUCATIONAL OBJECTIVES

- 1) To define critical financial target areas and their relationship to sustainable growth
- 2) To present tools that can be used in the design of an organization's financial plan
- 3) To illustrate strategies for performance enhancement to reach targets in the financial plan

+ Topics in Hospital Pricing & Reimbursement Issues

on-site or webinar

Regional/Operational Effect on Hospital Pricing and Strategies for Price Defense

DESCRIPTION

Hospital executives often consider the extent to which various environmental factors impact the organization's price position. Using a national hospital study, these factors and their associated impact will be explored. Further, strategic responses will be discussed to address how a hospital can defend its price structure in light of its unique operating environment. This session will address these issues with the following objectives:

EDUCATIONAL OBJECTIVES

New for 2010!

- 1) Understand the relationships of operating environment factors on hospital price through a national data study
 - 2) Assess current price position with critical performance metrics for inpatient and outpatient areas
 - 3) Defend hospital pricing in light of unique operating environments by implementing appropriate policies and strategic models
-

Establishing Defensible Pricing in Transparent Times

DESCRIPTION

Hospital pricing continues to receive scrutiny from media and community groups. In light of this increased attention, how do hospitals create a pricing strategy that is not only defensible to the community, but also profitable?

EDUCATIONAL OBJECTIVES

- 1) To provide information regarding critical hospital pricing relationships
 - 2) To present hospital pricing trends in the US
 - 3) To describe how a hospital can implement a defensible pricing strategy that respects the bottom line
-

Billing & Coding: A Focus on Missed Reimbursement & Data Quality

DESCRIPTION

Examining patterns in the coding and billing of patient claims data can yield valuable information that assesses the accuracy of payment, as well as, data quality. Most facilities utilize either an internal or external claim 'scrubber' to ensure their claims are as accurate as possible, but many opportunities may be missed by not comparing patterns to industry standards.

EDUCATIONAL OBJECTIVES

- 1) To demonstrate the value in examining patterns in coding and billing data
- 2) To provide benchmarks for data quality
- 3) To explore root causes of coding and billing errors

+ Topics in Performance Measurement & Enhancement

on-site or webinar

Ten Ways to Improve Medicare Profitability

DESCRIPTION

Medicare is the largest payer for most US acute-care hospitals, however, contract negotiation is not an option to enhance profitability. This session will identify ten actionable ways to improve the margin on treating patients within this critical payer group without sacrificing quality or ethical standards.

EDUCATIONAL OBJECTIVES

- 1) To highlight US averages for Medicare profitability for inpatient and outpatient care
- 2) To understand the key drivers for improved Medicare profitability
- 3) To identify ten actionable strategies for enhancing Medicare profitability

Building Value in Your Community Hospital

DESCRIPTION

As hospital information becomes more transparent, it is critical to strengthen the value-position of the organization. Hospitals that are able to increase value and communicate that position to residents should realize benefits in community perception and selection for services.

EDUCATIONAL OBJECTIVES

- 1) To illustrate importance of value in community perception of hospital services
- 2) To identify key dimensions of hospital value and related findings from a national hospital-value study
- 3) To provide ways hospitals can enhance value in their community

about cleverley + associates

key staff



William O. Cleverley, PhD
President

William O. Cleverley, Ph.D., has been the President of Cleverley & Associates since its formation in January 2000. Prior to forming Cleverley & Associates, Dr. Cleverley was the President of CHIPS (Center for Healthcare Industry Performance Studies). He formed CHIPS in 1992 with Dr. Roger Harvey. United Healthcare acquired the firm in March 1998 and Dr. Cleverley remained on staff as a part-time employee until December 1999. Dr. Cleverley is also Professor Emeritus at The Ohio State University where he has taught courses in healthcare finance since 1973.

Dr. Cleverley is the author of over 40 books dealing with the application and use of financial management principles and data in healthcare organizations. In addition, he has authored over 160 articles on healthcare financial issues in a wide variety of both academic and professional journals.



James O. Cleverley, MHA
Principal

Mr. Cleverley serves as a Principal for Cleverley & Associates, where he has worked since September 2003. Mr. Cleverley consults with hospital and healthcare organizations to identify financial and operating opportunities, as well as related strategies for performance improvement. Prior to joining the firm, he directed a statewide health services program for a medical association.

Mr. Cleverley has written several articles dealing with healthcare financial analysis and application, including the annual Community Value Index hospital survey. He was the recipient of the Healthcare Financial Management Association's Yerger/Seawell Best Article award.

Mr. Cleverley received his Masters in Health Administration from The Ohio State University in 2004. He received his Bachelors of Science in Business Administration from The Ohio State University in 1999.

key staff

Scott Houk, CPA Senior Strategic Advisor



Scott Houk, CPA serves as a Senior Strategic Advisor for Cleverley + Associates. Mr. Houk consults with hospital and healthcare organizations to identify financial and operating opportunities, as well as related strategies for performance improvement. Prior to joining the firm, Mr. Houk was a Senior Manager in the Health Sciences Advisory Services division of Ernst & Young.

Mr. Houk has over 15 years of experience working with hospital financial managers across the United States. His experience includes performing Medicare Disproportionate Share Services; completing financial audits of hospitals and healthcare systems; and managing other projects including Medicare bad debt analysis, various financial reviews, third party contractual reviews, Ohio HCAP reviews, and Medicaid payment appeals.

Mr. Houk received his B.A. in Business Administration with Accounting emphasis from Transylvania University in Lexington, KY in May 1993. He is a current member of the Healthcare Financial Management Association and Ohio Society of CPAs.

Lauree E. Handlon, MS, RHIA, CCS, CPC-H Director, Data Quality & Reimbursement



Lauree E. Handlon, MS, RHIA, CCS, CPC-H, has been the Director of Data Quality & Reimbursement for Cleverley + Associates since July 2002. Prior to joining the firm, Ms. Handlon was the OCE/NCCI Auditor at The Ohio State University Medical Center. Her primary focus was to investigate and resolve the Outpatient Code Editor errors related to coding and medical necessity issues. She worked closely with APC regulations, guidelines, and updates provided by CMS and the local Fiscal Intermediary. She was the primary source connection between Patient Accounts and Medical Information Management to insure accuracy of outpatient claims.

key staff



Kim L. O'Neil, RHIA
Data Quality & Reimbursement Consultant

Ms. Kim O'Neil, RHIA has been a Data Quality & Reimbursement Consultant for Cleverley + Associates since October 2005. Prior to joining the firm, Ms. O'Neil was a Charge Description Master Analyst at The Ohio State University Medical Center. She joined OSUMC in 2001 as the Outpatient Coding/File Services Manager in Medical Information Management. She spent the majority of her time managing the outpatient coding and file services area for the Arthur G. James Cancer Hospital. Ms. O'Neil also monitored unbilled accounts, provided education to the James outpatient coding staff and investigated outpatient claims that were holding for NCCI and OCE edits.

Ms. O'Neil received her degree in Health Information Management and Systems at The Ohio State University in 2001. She was certified as a Registered Health Information Administrator in the fall of 2001. She is also a member of the American Health Information Management Association.



Ann M. Zuchowski, RHIA
Data Quality & Reimbursement Consultant

Ms. Ann Zuchowski, RHIA has been a Data Quality & Reimbursement Consultant for Cleverley + Associates since September 2007. Prior to joining the firm, Ms. Zuchowski was an Assistant Director of Health Information Management at The Ohio State University Medical Center East. She joined OSUMC in 1999 as a Senior Coding Specialist and moved into the Inpatient Coding Manager position in 2000. In this position, Ms. Zuchowski spent the majority of her time managing the inpatient coding for the Medical Center. She also reviewed focused, paired, and transfer DRGs for coding accuracy to ensure proper billing as well as investigated and resolved outpatient claims that were holding for NCCI and OCE edits.

Ms. Zuchowski received her degree in Health Information Management in 1995. She was certified as a Registered Health Information Administrator in the fall of 1995. She is also a member of the American Health Information Management Association.

about cleverley + associates

Cleverley + Associates exists to enhance the financial position of hospitals so that they can better serve their communities. We accomplish our mission by working with healthcare leaders to provide them with industry and hospital-specific intelligence and by educating them on the changing face of the healthcare industry. Our firm is committed to education as validated by our experience in the area.

It is our belief that significant opportunities for financial improvement remain available to the vast majority of hospitals through insightful review and education, and interpretation of data. Our primary goal is to provide solutions and recommendations to clients that will enhance their financial performance through better pricing decisions, improved coding, capital restructuring, cost and productivity enhancements, and/or investment management changes.

We believe that many hospitals can double their current level of profitability through a thorough, critical review of operations. Our staff of professionals is well qualified to assist in these reviews and help identify areas for substantial improvements in hospital financial performance.

Our Web Site

www.cleverleyassociates.com

Free Hospital Data

www.hospitaldx.com

Web Educational Sessions

cleverleyevents.webex.com

Cleverley + Associates' Events Calendar

www.cleverleyassociates.com

How to Schedule an Educational Session

To schedule any of the Expertise in Action sessions outlined in this brochure, simply fill out the form below and mail or fax to Cleverley + Associates. For pricing, availability, or general questions, please email us at info@ca-education.com or call us at **888.779.5663**.

1 CONTACT INFORMATION

RETURN THIS FORM:

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By Fax:

614.413.3455

By Phone:

888.779.5663

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info@ca-education.com

First Name / Last Name

Title / Organization

Address

City / ST / Zip

Phone / Email

2 EVENT DETAILS

Please provide us with some brief details regarding your educational session, so that we can ensure your needs are met.

Tentative Date(s)

Audience Size

Audience Titles

Event Location

Budget

Topics in which you are interested

Additional Comments/Questions

Please note: fees for educational sessions will vary based on duration and format.
Please contact Cleverley + Associates for additional details.

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