



17th Annual Workshop for Transplant Financial Coordinators

2022



MEETING AGENDA

Early Registration Opens SUNDAY, SEPTEMBER 11, 2022 – 4:00 PM to 6:00 PM

TRANSPLANT FINANCIAL COORDINATORS:

Ensuring we provide accurate financial information to our patients and their families in a compassionate and tactful manner, while maximizing reimbursement for our transplant centers.

DAY 1: MONDAY, SEPTEMBER 12, 2022

7:00 AM - 7:00 PM
*International Ballroom
Foyer*

REGISTRATION OPEN

7:00 AM - 5:00 PM
5:30 PM - 6:30 PM
Garden Pavilion

EXHIBIT AREA OPEN

7:00 AM - 8:00 AM
Garden Pavilion

BREAKFAST

7:00 AM – 8:00 AM
Marseilles/Portofino

TFC Certification Test Study Group
Moderator: *Laura Aguiar*

GENERAL SESSIONS



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~~ Please sit with your transplant specialty - signs on tables ~~

8:00 AM - 8:30 AM

Welcome

International Ballroom

WELCOME to San Diego!

Deidra Simano, *TFCA President, Transplant Financial Coordinator, Dartmouth Hitchcock Medical Center, Lebanon, NH*

8:30 AM - 9:30AM

KEYNOTE ADDRESS

International Ballroom

KEYNOTE ADDRESS

Heart Transplant Survivor

Gabrielle Bolden, *Heart Transplant Recipient, Birmingham, AL*

Gail Dennis, *Mother of Gabrielle Bolden, Birmingham, AL*

Moderator: Deidra Simano, *TFCA President, Transplant Financial Coordinator, Dartmouth Hitchcock Medical Center, Lebanon, NH*

9:30 AM - 10:00 AM

Garden Pavilion

BREAK with EXHIBITORS

10:00am – 10:30 AM

Sponsor Session

International Ballroom

VELOXIS PHARMACEUTICALS - SPONSOR SESSION

Fast Facts About Insurance for Kidney Transplantation

Andrea Tietjen, *AVP of Transplant Finances, Quality and Data, Saint Barnabas Medical Center, Livingston, NJ*

Moderator: Deidra Simano, *TFCA President, Transplant Financial Coordinator, Dartmouth Hitchcock Medical Center, Lebanon, NH*

10:30 AM – 12:00pm

Round Tables

International Ballroom

ROUND TABLES: *Building Blocks of Best Practices—Different Programs: Same Patient Concerns & Dynamics*

◆ BMT ◆ Heart ◆ Kidney ◆ Liver ◆ Lung/Thoracic ◆ Multi-visceral ◆ Pediatric ◆ KPD

- *Communicating and collaborating*
- *Learning together*
- *Round table session*



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Moderators:

Lisa McDermott, *Transplant Operations Analyst, TFCA Trustee, Methodist Healthcare, Memphis, TN*

Lisa Donovan, *Transplant Financial Coordinator, TFCA Trustee, SUNY Upstate University Hospital, Syracuse, NY*

12:00 PM - 1:00 PM

Garden by the Bay

LUNCH generously sponsored by **VELOXIS PHARMACEUTICALS**

CONCURRENT BREAKOUT SESSIONS I

1:00 PM - 2:00 PM

2 topics – choose one to attend

UNOS

St. Tropez

UNOS: UNOS Update

Dianne LaPointe Rudow, *ANP-BC, DNP, FAAN, Vice President/President-Elect, United Network of Organ Sharing (UNOS) and Organ Procurement and Transplant Network (OPTN), Director of the Zweig Family Center of Living Donation, Professor Department of Population Health Science and Policy Recanati Miller Transplantation Institute, Mount Sinai Hospital, New York, NY*

Moderator: Deidra Simano, *TFCA President, Transplant Financial Coordinator, Dartmouth Hitchcock Medical Center, Lebanon, NH*

BMT Super Session

Riviera – Monte Carlo

FY 2023 Medicare stem cell transplant therapy updates with a focus on obtaining cost reimbursement

Valerie Rinkle, *Principal MPA, CHRI, Nimitt Consulting, Medford, OR*

Moderator: Lisa McDermott, *TFCA Trustee, Transplant Global Billing Specialist, Methodist Healthcare, Memphis, TN*

SESSION OBJECTIVES:

- Review 2022/2023 Medicare payment rates for HSCT



- Review steps to obtaining cost-based reimbursement of donor costs for Medicare inpatient allogeneic HSCTs
- Differentiate requirements for reporting expense and revenue for donor costs
- Steps to conduct your own self-audit

CONCURRENT BREAKOUT SESSIONS II

2:00 PM - 3:00 PM

3 topics – choose one to attend

NLDAC
St. Tropez

Increasing Access to Financial Aid for Living Donors through the National Living Donor Assistance Fund (NLDAC)

April Bruce, LCSW, Senior Program Assistant, NLDAC, Arlington, VA

Moderator: Lisa Donovan, TFCA Trustee, Transplant Financial Coordinator, SUNY Upstate University Hospital, Syracuse, NY

Many living donors are motivated to help a family member or friend by donating, but concerned about out-of-pocket costs like travel, lost wages, and dependent care. The National Living Donor Assistance Center (NLDAC) is a federally funded program that help these donors overcome financial barriers to donation by reimbursing their out-of-pocket expenses. About half of living donors are eligible. Learn how NLDAC helps and how to get your patients the assistance they need.

SESSION OBJECTIVES:

1. Describe the assistance available through NLDAC
2. Describe how financial coordinators can apply on behalf of patients and collaborate with colleagues to increase access to this program

BMT Super Session
International Ballroom

FY 2023 Medicare stem cell transplant therapy updates with a focus on obtaining cost reimbursement – Part 2: Panel discussion to share EMR tips to improve processes and reimbursement.

Valerie Rinkle, Principal MPA, CHRI, Nimitt Consulting, Medford, OR



Moderator: Lisa McDermott, *TFCA Trustee, Transplant Global Billing Specialist, Methodist Healthcare, Memphis, TN*

SESSION OBJECTIVES:

- Review 2022/2023 Medicare payment rates for HSCT
- Review steps to obtaining cost-based reimbursement of donor costs for Medicare inpatient allogeneic HSCTs
- Differentiate requirements for reporting expense and revenue for donor costs
- Steps to conduct your own self-audit

VAD/Heart
Riviera – Monte Carlo

Oh, and one more thing....the constant change navigating heart and VAD authorizations

Erin Davis, BSN, RN, Nurse Manager, Cardiothoracic Transplant, MCS & AHF Program Manager, University of Utah Health, Salt Lake City, UT

Moderator: Joan Douglas, *TFCA Trustee, Transplant Financial Coordinator, Children’s Hospital of Alabama, Birmingham, AL*

An interactive presentation including case discussions to engage & educate attendees on the policy/regulatory changes impacting financial coverage for heart transplant and MCS therapies.

SESSION OBJECTIVES:

1. Recognize MCS/VAD device updates impacting coverage
2. Review UNOS Heart Transplant Allocation changes
3. Discuss challenging authorization scenarios and best practices to ensure optimal patient & program financial outcomes

3:00 PM – 3:30 PM
Garden Pavilion

BREAK with EXHIBITORS

CONCURRENT BREAKOUT III

3:30 PM - 4:30 PM



Improving Patient Experience

St. Tropez

COVID Self-Help: How to Stay Engaged and Recharge from Home

Shanda Ross, MSN, RN, Director, Engagement Outreach and Belonging, Nebraska Medicine, Omaha, NE

Moderator: Windy Wyche, CTFC, B.S.C of Healthcare Management, Blood and Marrow Transplant Department, Aflac Cancer & Blood Disorders Center, Children’s Healthcare of Atlanta, GA

SESSION OBJECTIVES:

This session will share the importance of staying engaged and how to recharge while working remote during the pandemic and beyond. Sometimes we unintentionally create an environment where we are disengaged and begin to reach burn out. Shanda Ross will share the connection between inclusive integrity and cultural humility as well as present tools that can assist everyone no matter their role in the workplace that will promote engagement and recharge.

Lung

International Ballroom

Lung Transplant: Transplant Financial Coordinator (TFC) Review of Processes

Anita Ihasz, Lung Transplant Financial Coordinator, Bachelors of Science, Health Studies, UCSD Medical Center, La Jolla, CA

Nicole Vachon, Heart Transplant & LVAD Financial Coordinator, UCSD Medical Center, La Jolla, CA

Moderator: Lisa McDermott, TFCA Trustee, Transplant Global Billing Specialist, Methodist Healthcare, Memphis, TN

SESSION OBJECTIVES:

- Lung Transplant – Overview of processes of a UCSD TFC
- Work Flow and Team Communication
- Review of Patients Insurance and Insurance “MUST DO’s”
- TOOLS to do our JOB
- Insurance Websites – Log-ins and Phone Lists
- Lists of Codes



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- Documentation of Patients insurance benefits, Authorizations, and communications with payors,...
 - Counseling Patients – document all phone calls
1. Discuss Team workflow and how we communicate regarding authorization approvals, denials and any insurance issues important to the Patient's care.
 2. I will discuss how a Lung TFC works with Health Plans Transplant Case Management, meeting protocol requirements to secure approvals and revenue for all phases of transplant.

BMT

Riviera – Monte Carlo

The Ever-Changing World of the BMT TFC

Raj Dhami, *Patient Advocate III, Sutter Medical Center Sacramento, Sacramento, CA*

Moderator: Tanya Perrin-Selden, *MBA, BS, CTFC, TFCA Trustee, BMT Financial Coordinator, New York Presbyterian Hospital-Columbia, Trustee, TFCA, New York, NY*

The purpose of this session is to provide New and seasoned TFCs information on BMT insurance verification process, tips on how to be proactive in your role, and discuss BMT financial barriers. This session will also provide TFCs the opportunity to collaborate with other fellow TFCs.

SESSION OBJECTIVES:

- Verifying BMT Benefits
- Take-charge as a TFC
- Financial Barriers in the BMT World
- Open Discussion

5:30 PM – 7:00 PM
Garden by the Bay

“Beach Luau” WELCOME RECEPTION – Mix and Mingle with your fellow TFCs



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DAY 2: TUESDAY, SEPTEMBER 13, 2022

7:30 AM - 4:45 PM
Foyer

REGISTRATION OPEN

7:15 AM - 2:30 PM
Garden Pavilion

EXHIBIT AREA OPEN

7:15 AM - 9:00 AM**
Garden Pavilion

BREAKFAST

**** Note**** TFCA Business Meeting starts at **8:00 AM** for all TFCA Members

8:00 AM - 9:30 AM
TFCA Annual Business Meeting
International Ballroom

22nd Annual TFCA (Transplant Financial Coordinators Association) Business Meeting [*Session Attendance Limited to TFCA MEMBERS*]

The *TFCA Business Meeting* is for active TFCA members only. In this meeting the TFCA governing body is charged with disseminating association business information: Officer Reports, Financial Reports, and Committee Reports: Certification, Fundraising, Elections, Planning, and Resource Guide. Open discussion will follow officer reports and committee updates for members to ask questions and seek clarification on subjects and topics pertinent to our organization.



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9:30 AM - 9:45 AM
Garden Pavilion

BREAK with EXHIBITORS

GENERAL SESSIONS

9:45 AM - 10:45 AM
Fundraising Organizations
International Ballroom

Fundraising for Transplants: Financing a Transplant During a Pandemic: How to get patients to make the call for fundraising

Rick Lofgren, *CFRE, MBA, President & CEO, Children's Organ Transplant Association-COTA Bloomington, IN*

Kelly Green, *Executive Director, Help Hope Live, Radnor, PA*

Samantha Palazolo, *Senior Director of Patient Services, National Foundation for Transplants (NFT), Memphis, TN*

Moderator: Lisa McDermott, *TFCA Trustee, Transplant Global Billing Specialist, Methodist Healthcare, Memphis, TN*

TFCs work daily to help patients and their families prepare for the significant out-of-pocket costs associated with transplantation, including both pre- and post-transplant expenses. The nonprofits Help Hope Live, the National Foundation for Transplants, and the Children's Organ Transplant Association, each partner with families and communities across the country to help raise funds to overcome financial hurdles to transplant. Funds raised help cover medical costs for the evaluation, deductibles and co-pays, benefit caps, post-transplant insurance difficulties, medication costs, and other related expenses. Additionally, families face lost wages, daily household expenses, transportation and lodging costs—all the while dealing with the emotional and physical challenges to transplant care during the pandemic.

SESSION OBJECTIVES:

- Learn how to help your patients and families reach out to our organizations for fundraising support, which is beneficial for their success and that of your transplant program.
- This session includes details about why fundraising is a valued benefit; specific tips and examples for TFCs about how to talk with families about fundraising;



- Useful updates about the growing number of online fundraising options.

10:45 AM - 11:45 AM
Pharmacy
St. Tropez

340B Program Navigation and Best Practices for Pharmacy

Kristin Fox-Smith, MPA, Senior Vice President, Visante, Salt Lake City, UT

Moderator: Michelle McCardell, Certified Transplant Financial Coordinator, University of Utah Health, Salt Lake City, UT

SESSION OBJECTIVES:

What is the 340B Drug Discount Program, and why is it critical for those it serves?

Why does the Federal Government require these discounts be provided, and why are they currently in jeopardy and shrinking?

Kristin Fox-Smith has focused on the compliance requirements to support 340B Covered Entities for more than 20 years, and will provide foundational information about this Program that provides critical support, both medical and pharmacy, to hospitals and transplant programs alike.

12:00 PM - 1:00 PM
Garden Pavilion

LUNCH

CONCURRENT BREAKOUT SESSIONS IV

1:00 PM - 2:00 PM

3 topics – choose one to attend

Cost Report Basic
St. Tropez

Overview of Reimbursement for Organ Acquisition Costs: Medicare Cost Report, SAC, Monitoring Reimbursement

Robert Howey, Senior Director, CPA, MBA, MHA, CHFP, Toyon Associates, Inc., Concord, CA

Moderator: Joan Douglas, TFCA Trustee, Transplant Financial Coordinator, Children’s Hospital of Alabama, Birmingham, AL



SESSION OBJECTIVES:

The basic session will provide an overview of Medicare reimbursement for organ acquisition costs and discuss the key drivers for Medicare reimbursement. Case studies will highlight the common and not so common findings based on reviews of various transplant centers.

BMT
International Ballroom

Be Careful What You Ask For: Implementing Medicare Cost Reporting for Allogeneic Donor Services

Gary Goldstein, *Director, Transplant Services Operations, BMT Cellular Therapy and Solid Organ Transplantation, Stanford Health Care, Milano Park, CA*

Moderator: Laura Aguiar, *CTFC, TFCA Trustee, Principal & Managing Partner, Transplant Solutions, LLC, Phoenix, AZ*

Kidney Paired Donations
Riviera – Monte Carlo

Tools, Tips and Tricks for KPD Financial Coordination

Andrea Tietjen, *AVP of Transplant Finances, Quality and Data, Saint Barnabas Medical Center, Livingston, NJ*

Moderator: Kara Hovatter, *BS, CTFC, TFCA Treasurer, Director of Transplant Finance and Regulatory Compliance, Virtua Health, Camden, NJ*

SESSION OBJECTIVES:

- Present background on financial/operational aspects of paired exchange and how this program differs from standard living donation
- Present issues and barriers identified with operationalizing paired exchange from an administrative and financial perspective. Include guidelines on regulatory compliance and quality initiatives.
- Impart strategies to assist centers in to effectively implement and manage kidney paired exchange. Describe and demonstrate processes, procedures, and tools.

2:00 PM-2:30 PM
Garden Pavilion

BREAK with EXHIBITORS



CONCURRENT BREAKOUT SESSIONS V

2:30 PM - 3:30 PM

2 topics – choose one to attend

**COST REPORT
ADVANCED**
St. Tropez

Cost Report Advanced

Robert Howey, *Senior Director, CPA, MBA, MHA, CHFP, Toyon Associates, Inc., Concord, CA*

Moderator: Joan Douglas, *TFCA Trustee, Transplant Financial Coordinator, Children’s Hospital of Alabama, Birmingham, AL*

SESSION OBJECTIVES:

In the advanced session, we will take a closer look at the CMS regulatory changes to organ acquisition payment policies, highlight the financial impacts to Medicare reimbursement for organ acquisition, and discuss needed process changes within the transplant center to comply. We will also discuss how the TFC can assist in the cost report preparation process and compliance with the regulatory changes.

TFC 101
Riviera – Monte Carlo

So Now You’re a Financial Coordinator....A Beginners Guide for the New TFC

Nyellka Jemmott, *Transplant Financial Coordinator, CPC, SUNY Upstate University Hospital, Syracuse, NY*

Tanya Perrin-Selden, *BMT Financial Coordinator, MBA, BS, CTFC, New York Presbyterian Hospital-Columbia, Trustee, TFCA, New York, NY*

Moderator: Laura Aguiar, *CTFC, TFCA Trustee, Principal & Managing Partner, Transplant Solutions, LLC, Phoenix, AZ*

SESSION OBJECTIVES:

The presentation will provide a broad conspectus of the daily role of a financial coordinator and work as a beginners guide to those who are new to transplant and to the role of a transplant financial coordinator. The spectrum will cover from the role of solid organ and bone marrow transplant.



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CONCURRENT BREAKOUT SESSIONS VI

3:30 PM - 4:30PM

3 topics - choose one to attend

Liver
St. Tropez

Liver Transplant & Finance

Angela M. Smith, MSN, RN, CNML, Abdominal Transplant Program Manager, St. Joseph's Hospital & Medical Center-NTI, Phoenix, AZ

Moderator: *Diane Bethea, Transplant Financial Coordinator, Children's Healthcare of Atlanta, GA*

SESSION OBJECTIVES:

Overview of how the clinical team can partner with the TFC to facilitate access to liver transplant and continuity of care. Discussion of how the TFC is a key component to the interdisciplinary transplant team. Review of clinical definitions, insurance requirements, contracting, and patient education needs.

VA
International Ballroom

The Mission Act: Access to Transplant for Veterans

Michelle McCardell, Certified Transplant Financial Coordinator, University of Utah Health, Salt Lake City, UT

Moderator: *Sharon Walls, CTFC, TFCA Secretary, Transplant Financial Coordinator, Providence Sacred Heart Medical Center & Children's Hospital, Spokane, WA*

SESSION OBJECTIVES:

People with access to Veterans Health benefits have been required to utilize the VA Transplant contracted centers until the Mission Act was implemented. Now, Veterans have the choice to use their local transplant facility. After this presentation, the TFC will be able to assist the patient in utilizing "Community Care" to access transplant services at their local facility.



AKF
Riviera – Monte Carlo

American Kidney Fund: Charitable Assistance for Recently Transplanted Kidney Patients

Michael Spigler, *MCHES, American Kidney Fund, Rockville, MD*

Moderator: Lisa Donovan, *TFCA Trustee, Transplant Financial Coordinator, SUNY Upstate University Hospital, Syracuse, NY*

SESSION OBJECTIVES:

The American Kidney Fund (AKF) has been providing charitable assistance to low-income kidney patients since 1971. In this presentation, transplant financial coordinators will learn about the variety of financial assistance programs available to their patients from AKF, the eligibility requirements for each program, and tips for how to best utilize AKF’s online Grants Management System to apply on their patients’ behalf.

4:30 PM – 5:30PM
Marseilles - Portofino

TFC Certification Test Study Group

DAY 3: WEDNESDAY, SEPTEMBER 14, 2022

7:30 AM - 1:30 PM
Foyer

REGISTRATION OPEN

7:00 AM - 8:30 AM
Garden Pavilion

BREAKFAST

7:30 AM - 9:30AM
St. Tropez

TFC CERTIFICATION TEST

Must be an active 2022 member in TFCA to participate in certification testing.

General Session
9:30 AM - 10:30 AM



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CMS-Virtual Session
International Ballroom

Medicare Eligibility, Enrollment, and Coverage for Transplant Services (Virtual Session)

David Santana, *DHHS-CMS, Health Insurance Specialist, Department of Health and Human Services, Centers For Medicare and Medicaid Services CMS, Washington, DC*

Moderator: Deidra Simano, *TFCA President, Transplant Financial Coordinator, Dartmouth Hitchcock Medical Center, Lebanon, NH*

SESSION OBJECTIVES:

This session will provide a detailed overview of Medicare program policies and rules, including eligibility, covered services, and order of payers; emphasis on transplant and disability related policies and programs.

10:30AM - 11:00AM

BREAK – *use this time for check out of your hotel room and bring your luggage to sessions in the Boardroom*

**General Sessions Special prize drawing during 12:30PM
General Session -- not to be missed –**

MUST BE IN ATTENDANCE TO WIN!

GENERAL SESSION

11:00 AM - 12:00 PM

CMS – Virtual Session
International Ballroom

Current Topics: Updates and What to Expect for 2023 (Virtual Session)

David Santana, *DHHS-CMS, Health Insurance Specialist, Department of Health and Human Services, Centers For Medicare and Medicaid Services CMS, Washington, DC*

Moderator: Deidra Simano, *TFCA President, Transplant Financial Coordinator, Dartmouth Hitchcock Medical Center, Lebanon, NH*

SESSION OBJECTIVES:



Current Topics contains some of the Centers for Medicare & Medicaid Services' (CMS') priorities, initiatives, and programmatic updates. A summary of new laws, regulations, and guidance affecting Medicare, Medicaid, CHIP, and the Private Health Insurance Marketplaces.

12:00 PM - 1:00 PM
Contracting
International Ballroom

What You Should Know (& Do) About Transplant Contracting

Jennifer Milton, *Chief Administrative Officer – University Health Transplant Institute*

Moderator: Laura Aguiar, *CTFC, TFCA Trustee, Principal & Managing Partner, Transplant Solutions, LLC, Phoenix, AZ*

Sweeping finance changes continue in the healthcare and transplant. This session will explore the rise of Value Based Health Care initiatives, issues surrounding Centers of Excellence designations and the potential impact of proposed changes for Medicare reimbursement policies on the horizon. We will focus on the role Transplant Financial Coordinators should play in aiding their centers in recognizing needs and improvements in managed care contract management to improve access and outcomes for patients.

SESSION OBJECTIVES:

- Summarize key elements of Value Based Care models for kidney care and transplantation.
- Describe the status of Centers of Excellence criteria for solid organ transplant programs
- Discuss three strategies to improve Managed Care Contract collaboration

Wrap-Up
1:00 PM - 1:30 PM
International Ballroom

2022 TFCA Workshop Wrap-Up & Evaluations

Lisa McDermott, Transplant Operations Analyst, Methodist Healthcare, Memphis, TN; TFCA Trustee, TFCA Workshop Planning Committee Co-Chair

Lisa Donovan, Transplant Financial Coordinator, SUNY Upstate University Hospital, Syracuse, NY; TFCA Trustee, TFCA Workshop Planning Committee Co-Chair



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THANKYOU!