

# HCAF 2009 ANNUAL CONFERENCE & TRADE SHOW

## PRESENTER BIOGRAPHIES

### **NANCY E. ALLEN BSN,RN-C**

Experience July 2001 Solutions for Care, Inc. –Owner/CEO to present Specializing to the home health care industry in areas of analysis of operations, compliance, start ups and training. Consultant for Marrelli and Associates, Inc. specializing in areas of due diligence for clinical operations, analysis, regulatory compliance and government applications. Adjunct professor at Florida Community College at Jacksonville, Florida.

### ***(CHERYL JORGENSON WILL SUBSTITUTE FOR KEITH BAUMGARN)***

### **~~KEITH BAUMGARN, CLU, ChFC, QPA, CRC, FLMI~~**

~~Mr. Baumgarn is vice president of pension sales with Lafayette Life Insurance Company, located in Lafayette, Indiana. He has been in the pension industry for 25 years, 17 of those with Lafayette Life. Keith is approved in 18 states to conduct CE seminars for insurance agents. Nationally thru NASBA, he leads CE accredited seminars for CPAs.~~

### **DEXTER BRAFF**

Dexter W. Braff President 1665 Washington Road Suite 3 Pittsburgh, PA 15228 Dexter is the President of The Braff Group, a leading investment banking firm specializing in the home health care, hospice, infusion therapy, specialty pharmacy, health care staffing, and home medical equipment market sectors.

### **GLENDA A. BURKE, RN, BS**

Is a registered nurse with 37 years extensive experience in the health care industry. Glenda is founder, owner and primary nurse consultant for Alternatives, a consulting and education service. Her company provides expertise in consulting services to health care organizations throughout the Northeastern United States and she is a recognized expert in the areas of federal compliance issues, agency fraud and abuse clinical defense as well as agency compliance planning, program development, education and implementation. She is a featured speaker on the state and national levels. Glenda believes that humor can be found in all things, even in the federal government's concept of compliance for home health organizations.

### **CHARLES CANAAN, RN, MPH**

Has over 20 years of diverse nursing experience in a variety of health care settings, to include inpatient, outpatient, home and organizational settings. His education includes a Bachelor of Science Degree in Nursing from Old Dominion University in Norfolk, Virginia and a Master of Public Health Degree in Health Promotion and Education from the University of South Carolina. He currently provides education and consultation to new hospice and other Medicare Part A providers and those with learning needs.

### **ARNIE CISNEROS**

Arnie Cisneros, P.T., President of Home Health Strategic Management, has provided clinical services, program development and management consultation in geriatric rehab and home health since 1979. He is renowned for his refinement of clinical delivery mechanisms, the integration of new protocols at the staff level and the adaptation of traditional care philosophies to address current health care initiatives. Arnie presents nationally on utilization review for homecare, best practice adaptation and clinical management for quality outcomes. He authors "Home Health Forum", a bi-weekly column addressing contemporary homecare issues. He is a graduate of The Ohio State University School of Physical Therapy.

### **CHRISTINA CRUMBLEY, RN, BSN**

Clinical Consultant Reingruber & Company, P.A. Educational Institutions St. Petersburg Junior College, Associate in Nursing 1991 University of Phoenix, Bachelors of Nursing 1998 Walden University, currently enrolled for Master of Nursing Florida Nursing RN License 2580322 Positions Held: Clinical Consultant, Reingruber and Company, 1 year Regional Director of Nursing, Medi Home Health - 4 years Regional Performance Improvement Coordinator, Visiting Nurse Association - 2 years Clinical Manager, Care One - 5 years Director of Nursing, Maxim Home Health - 3 years

### **DONALD CUMMINS**

President, Stoneridge Partners, a merger and acquisition firm that specializes in brokering home health agencies and hospices. Since 1983, Don has brokered hundreds of businesses. In 1996 he began specializing in brokering home health companies and in 2001 founded Stoneridge Partners. In 2001, Don received the highest designation available for his profession, Merger & Acquisition Master Intermediary (M&AMI).

### **JOSE DAVILA**

Billing Consultant Reingruber & Company, P.A. University of Puerto Rico, Bachelor in Business Administration and Industrial Management Positions Held: Billing Consultant, Reingruber & Company, 3 years Billing Manager, Medi Home Health, 3 years Billing Manager, Gentiva Home Health 2 years

**BILL DOMBI, ESQ.**

Director for the National Association for Home Care's Center for Health Care Law, Bill is responsible for class action litigation, representation of patients and providers on individual legal issues, Medicare and Medicaid regulatory reform issues and counsel on legislative matters. Mr. Dombi received his Juris Doctorate, cum laude from the University of Connecticut. He is a featured speaker with home care associations throughout the United States.

**MICHELLE ENGER, MBA**

Is the CEO and founder of Optimal Reimbursement Strategies, ([www.optimalreimbursementstrategies.com](http://www.optimalreimbursementstrategies.com)) which is a Florida based company that specializes in home health reimbursement. She formed Optimal Reimbursement Strategies, LLC after observing the need for home health agencies to be fully reimbursed for services they provide. She was selected to work with CMS on the implementation of PPS in October 2000 and has more than 10 years of home health reimbursement experience, which includes her former position as Director of Reimbursement for Senior Home Care, Inc. Clearwater, FL. Her educational achievements include a BA in Business Management from Eckerd College (August 2003) and an MBA in Management from the University of Miami (May 2006). Her knowledge and expertise in home health reimbursement has been requested and quoted often in home health publications such as Eli's Home Care Week. She also provides monthly webinars and training sessions through her own company and has presented two teleconferences for Eli's Research titled, Home Health PPS 2008 Reimbursement Issues and How to Deal With Them Effectively, May 21, 2008 and Introduction to Home Health Medicare PPS, June 4, 2008.

**DR. ROBERT FAZZI**

Is President and Chief Executive Officer of Fazzi Associates; a national consulting, planning, benchmarking and research firm that specializes in the unique needs of home care, hospitals and other health related systems. Bob was also the former President / CEO of the Center for Human Development, one of the largest health and human service agencies in New England. Bob has been involved with the home care field for nearly thirty years. In addition to providing consulting and organizational services to agencies throughout the country, he has been deeply involved in operational and best practice research studies. He was the Co-Director of the 3M National OASIS Integrity Project and the Briggs® National Quality Improvement / Hospitalization Reduction Study. Most recently, he has served as the co-director of the Philips National Study on the Future of Technology and Telehealth in Home Care.

**MELINDA GABOURY**

Ms. Gaboury has over 16 years of experience in Medicare Home Health. She has been vigorously analyzing the PPS Reform regulation and is set to prepare agencies for what lies ahead. She has been a workshop presenter for 24+ State Home Health Associations and is interviewed frequently for national home health publications. Gaboury is also the author of *Home Health Pocket Guide to OASIS: A Reference Guide for Field Staff*.

**MICHAEL A. GUIDICISSI, CSC, CHCSP, CPDSP**

Has spent the past 16 years working in sales, sales management, and home care leadership. Michael served as Vice President of Business Development for a \$40 million regional home care company in the southwestern United States before forming his company, Power Shot Training in 2006. He coaches home care sales managers in business development and sales performance, and trains home care sales representatives. During his career he has taken literally hundreds of sales representatives from start up to success. Michael is the author of three books, *"Making the Approach: Advanced Sales Training for Home Care Professionals"*, *"Changing Lives: Achieving Your Untapped Potential"* and *"ALF 360, Global Sales, Marketing & Customer Service For The Assisted Living Industry"*. Michael is also the editor of *Homecare Sales Strategies*, the bi-weekly email newsletter for home care sales and marketing managers and sales reps. He also holds the Certified Sales Coach, Certified Home Care Sales Professional and Certified Private Duty Sales Professional designations. In his personal life, Michael's drive and endurance for success doesn't slow down. He is a 4x Ironman Triathlete and has competed in multiple marathons. With advanced industry knowledge and experience, together with Michael's powerful personality and motivational history, he's quickly become one of home care's most sought after speakers.

**ELIZABETH E. HOGUE, ESQ.**

An attorney in private practice with extensive experience in health care. Prior to becoming an attorney, she was employed as a personnel manager by a Blue Cross – Blue Shield Plan. Following her admission to the Bar, she developed an active practice in health law. Her clients throughout the country include: Professional associations, managed care providers, and institutional health care providers, including hospitals, long-term care facilities, home health agencies, durable medical equipment companies and hospices. Ms. Hogue is a member of the American Health Lawyers Association.

**STEVEN R. JONES**

Is a 1978 Graduate of UF, (BSBA Accounting) and has been a practicing CPA since 1980 (Cert # 9115). He's a Shareholder at Moore Stephens Lovelace, P.A. CPAs and Director of the Firm's Long Term Care Practice Group. Steve has over 29 years of experience in serving the accounting, reimbursement and regulatory needs of clients in the Long Term Care industry. He focuses his practice on home health agencies, skilled nursing facilities, and hospice organizations

#### **CHERYL JORGENSON, QPA, APA, QKA**

Cheryl has twenty seven years in the pension industry, 22 with Lafayette Life Insurance Company. She has experience in both the administration and marketing sides of the pension arena. She is currently the department head for the Retirement Services department of Lafayette Life Insurance Company and has both the administrative staff and the internal sales staff reporting to her. Cheryl has earned three pension designations, QPA and QKA from the American Society of Pension Actuaries and APA from the National Institute of Pension Administrators. In addition, she participates on the Small Employers and Individual Pension Committee (SEIPC) of Life Office Management Association (LOMA) and is a Past President.

#### ***(JIM LINDAHL WILL SUBSTITUTE FOR GARRY KEUTE)***

#### **GARRY KEUTE**

~~Is the Director of Business Development at VisionShare Inc. Garry has been the lead project manager for statewide Medicare Administrative Contractor transition events in 10 states. Garry has in depth knowledge of Medicare Reform and has been helping healthcare providers deal with the overwhelming prospect of re-establishing an EDI relationship with a new Medicare contractor while experiencing no downtime with their current Medicare reimbursement process. Prior to his role as Business Develop Manager at VisionShare, Garry spent over 15 years working in various sales, marketing, and project management roles for 3M Company and Imation. Today Garry leads a team of nine specialists who work directly with healthcare providers establishing direct EDI connectivity for batch claims/remits, Direct Data-Entry (DDE), eligibility verification, and any supported ANSI reimbursement transactions.~~

#### **DIANA L. KORNETTI, MA, PT, HCS-D, COS-C**

Owner/Administrator, Integrity Home Health Care, Inc. BS - Physical Therapy, Boston University, 1985. MA - Health & Human Services Administration, Rider University, 1991. Practicing physical therapist for 23 years, with management experience in hospital, outpatient and ownership experience in home health settings. Current co-owner of a Medicare-certified home health agency in central FL. Responsible for hiring and training staff members in all work settings.

#### **~~CINDY KRAFFT PT MS COS-C~~**

~~Assistant Director of Operational Consulting Fazzi Associates, Inc Northampton, MA Contact Address: 502 Sagewood Drive Peoria, IL 61604 309-657-1458 Andrews University Berrien Springs, MI Graduated in 1992 with MS PT Cindy Krafft PT, MS, COS-C is the current Vice President of the Home Health Section of the APTA and the Assistant Director of Operational Consulting for Fazzi Associates, Inc. With thirteen years of Home Health experience, she works with agencies and state home care associations to improve understanding and utilization of therapy services via consultation and education.~~

#### **LINDA KRULISH, PT, MHS, COS-C**

A physical therapist in home care since 1988, is a nationally recognized expert on OASIS and home health quality improvement. She serves as a consultant to the **Centers for Medicare & Medicaid Services (CMS)** and its contractors, assisting in the development and refinement of the OASIS data set and resources, quality improvement measures and practices, and PPS-related models, tools and training materials. Currently she oversees the contract managing the national **CMS OASIS Q&A Mailbox** and overseeing the annual training of the state **OASIS Education Coordinators**, and is assisting with refinement of items, process measures and support materials related to the **OASIS-C**. She is the **President** and a **Founding Member** of the **OASIS Certificate and Competency Board (OCCB)**, serving as **Chair** of the **OCCB's Clinical Advisory Panel** and **Exam Review Task Force**. Linda is **President** and **Founder** of **OASIS ANSWERS, Inc.**, in Redmond Washington.

#### **JIM LINDAHL**

Southeast Regional Manager, VisionShare, Inc. - Jim has in-depth knowledge of Medicare Contracting Reform and has been helping healthcare providers deal with re-establishing an EDI relationship with a new Medicare Administrative Contractor while experiencing no downtime with their current Medicare reimbursement process. Prior to his role as Regional Manager at VisionShare, Inc., Jim worked companies that sold software, hardware and services for LAN/WAN networking and storage. He also has experience with commercial, education, governmental and healthcare organizations, including Home Health and Hospice.

#### **SHARON M. LITWIN, RN, BS, MHA**

President, 5 Star Consultants, LLC 1978 - RN Graduate, Reading Hospital School of Nursing 1992 - Bachelor of Science, Health Science, Chapman University 2005 - Master in Health Administration, Rushmore University Licensed Registered Nurse - Missouri and California 2003 - present - Founder - 5 Star Consultants 2007 - present - ACHC Surveyor 2003 - 2006 - CHAP Site Visitor 1997 - 2003 - Executive Director, Home Services - Unity Health Services 1993 - 1997 - Regional Director - NMC Homecare

**BOBBY LOLLEY, RN**

Is currently Executive Director for the Home Care Association of Florida. He has worked in the home care industry for the past 15 years. His experiences in homecare have ranged from being a per diem staff nurse providing care to patients in a small rural community, to a Regional Director for a large national chain. Bobby often says he has done just about every job there is in homecare but still remembers his first home visit and the feeling he gave him. "It was like I was standing there in this little old ladies house and a feeling came over me that I had finally come home. I knew then and there this would be where I would spend the remainder of my professional life." His faith and passion for homecare has never wavered since. Bobby graduated Cum Laude from the Valdosta State University in 1992 with a Bachelors Degree in Nursing.

**JOHN PAUL MAROSY**

President, Bringing Elder Care Home, a training and consulting firm specializing in elder care / work balance and the author of two award-winning books on elder care / work balance.

**ANNE MENARD**

Anne Menard has a vast knowledge of home-based programs, policy and program development and the legislative process as the Home Health Director at the Agency for Health Care Administration. She has worked for the Departments of Elder Affairs, and Health & Rehabilitative Services, The Florida Association of Homes for the Aging and The Area Agency on Aging of North Florida.

**CORY MERTZ**

Vice President and Partner of Stoneridge Partners. University of Florida, Gainesville, FL, Bachelor of Mechanical Engineering, 1992. He received his engineering degree from the University of Florida and began his career in the high technology sector where he was instrumental in the hyper-growth of a Fortune 500 electronics manufacturing provider. His ten years of experience managing the acquisition of multiple businesses taught him the skills to quickly recognize opportunities, skillfully negotiate business terms, and successfully close transactions. He joined Stoneridge Partners in 2006 and has become one of their premier dealmakers. His careful analysis of business information and his collaborative negotiation style produces a win-win for both the buyer and the seller.

**RICHARD MITCHELL**

Director of Employee Relations, Integrity Home Health Care, Inc. BA - American Studies, University of Florida, 1991. Work history includes Community Liaison, Director of Memory Care, Regional Director of Alzheimer's Association, ALF Consultant, Dept. of Elder Affairs (DOEA) and Program Specialist I and II, Mid-FL Area Agency on Aging, Inc.

**RICHARD A. ONORATO, CSA**

Principal of Willow Financial Services, LLC BA earned at University of Baltimore, class of 1972 Patrick L. Brown, CSA, MBA Principal of Willow Financial Services, LLC MBA earned at Loyola College of Maryland, class of 1978 Willow Financial Services is a prior presenter at HCAF conferences. Formerly, our subject matter was retirement planning (before the Pension Protection Act of 2006). We have been HCAF members since 1993.

**MERRILY ORSINI, MSSW**

Managing Director, corecubed Founded, grew & sold a care managed home care company 1981-1998. B.A. University of Kentucky 1969 M.S.S.W. Kent School of Social Work, University of Louisville 1977 Recently elected for the 2009-2010 Board of Directors, National Association for Home Care and Hospice. Speaking and writing on a national level since 1988. On editorial board, a regular contributor and guest editor of Home Health Care Management and Practice Journal (Sage Publications). Monthly contributor to Caring magazine (NAHC). Chapter editor of the Handbook of Geriatric Care Management (Jones & Bartlett). Annual conference presenter to NAHC, NPDA, PDHCA. Specialty is marketing for private duty in-home care, home health, and geriatric care management. Currently owns and operates corecubed, an integrated marketing communications agency that uses Web-based marketing as one component. Developed MOSTSM, a turn-key monthly marketing communications program designed for in-home care agencies that uses Web-based resources as one communications component.

**FRED SCHAFFER**

Known across America for his striking presentations, Fred Schaffer is a Performance Improvement Expert dedicated to moving others to Perform Better, Live Stronger and Dream Bigger. His message comes from the heart of 35 years of experience and studying high performance in order to overcome mediocrity and achieve better results. Fred (A.K.A the "Fit Food Dude") has held management/executive positions and demonstrated the ability to achieve extraordinary results in the **food/nutrition, healthcare, public education, health/safety, human performance, fitness therapy, and wellness promotion professions**. His further success as an author, business owner and nationally acclaimed conference speaker are a demonstration of his ability to continually apply the latest findings in maximizing human potential.

**KRISDEE A. SCHMALE**

As the Senior Regional Home Health and Hospice (RHHI) Ombudsman with Palmetto GBA, Krisdee serves as the liaison between Palmetto GBA, Centers for Medicare and Medicaid Services (CMS) and the provider community. Krisdee has been with the Provider Outreach and Education Department at Palmetto GBA educating providers regarding Medicare Coverage and billing policies and procedures since 2003. She represents Palmetto GBA as a keynote speaker at many conferences throughout 16 states. Krisdee earned a Bachelor of Science degree from the University of South Carolina. She is a Langevin Certified Instructional Designer and Developer and has completed several other Langevin courses in adult education and training. She is a graduate of the Greater Columbia Chamber of Commerce 2007 Leadership Columbia class and currently serves on the Leadership Columbia Committee.

#### **SANDRA A. SMITH**

Sandra A. Smith has a long and accomplished career in healthcare human resources management. Certified as a Senior Professional in Human Resources Management by SHRM and as a Master Trainer by Development Dimensions International, Ms. Smith is the founder and President of **HRpathways+**, a consulting firm that specializes in HR management issues in the home health and private duty arenas. Her areas of expertise include: Training and Learning Assessment; Training Program design and delivery; Improving Organizational Communication; Supervisory Success Strategies; Recruitment and Retention Strategies; Compensation Plan Document design (Sales/Business Development); Performance Management systems; HR Policy and Procedure development; Ethics and Compliance Program design and implementation. Career highlights include writing and producing turn-key ethics and compliance training programs for Tenet Healthcare's 150,000 employee population; designing creative recruitment and talent management programs for AllianceCare; managing multi-site offices for Sunrise Senior Living's private duty business; and serving as a Regional Vice President for HR for Tenet Healthcare.

#### **CRAIG SMITH**

Craig Smith rejoined the firm in 2008 after serving as General Counsel for Florida's Agency for Health Care Administration. Craig is Board Certified in Health Law by the Florida Bar, and he represents health care industry clients on a wide range of regulatory, transactional, and litigation matters. As General Counsel of the agency with a budget of over \$17 billion that regulates more than 32,000 health care facilities, Craig supervised over 40 in-house lawyers in four different offices across Florida and was a member of the agency's Senior Management Team. Craig oversaw significant class action and other complex litigation against the agency at the trial court and appellate court levels, and he addressed many critical health care issues, including statewide Medicaid managed care reform and the appropriate expansion of electronic health information. While serving as the chief legal officer of one of the nation's largest Medicaid programs, Craig coordinated frequently with federal officials at the Centers for Medicare and Medicaid Services and the Department of Justice. He was a member of the South Florida Health Care Fraud Task Force, and he represented the agency in its recovery of Medicaid overpayments, including one of the largest Medicaid overpayment recoveries in history. Craig also worked closely with Governor Crist's administration on legislative initiatives and to create innovative health care programs such as Cover Florida and Florida's Prescription Drug Discount Card Program. Craig originally joined Hogan & Hartson in 2001 and became a partner in 2005. While at Hogan & Hartson, Craig has represented health care clients in a wide range of matters, including class action litigation, internal compliance investigations, and in corporate transactions such as mergers, acquisitions, and joint ventures. Craig is a frequent speaker at national health law conferences, and he also served in a special temporary role as in-house counsel for one of Florida's leading health care

#### **SANDRA A. SMITH**

Has spent her entire career (20+ years) in various facets of human resources in the healthcare industry. She has been a Regional Vice President for HR for a Fortune 100 hospital operator company and she has designed countless training programs that get to the heart of the matter for all levels of team members. She has devoted the last year and a half to refining processes and systems to attract and keep certified nursing assistants and home health aides. Ms. Smith is certified as a Senior Professional in Human Resources Management by SHRM; a Certification in Healthcare Compliance; and as a master trainer by Development Dimensions, International.

#### **MICHELE THOMAS**

Regional Director of Development Edison Community College – Psychology Major 1990 Manatee community College – Early Childhood Associate 1999 True Colors – Certified Trainer Family Home Health Regional Director of Development HCR Manor Care Manager of Market Development Kelly Home Care Marketing Director

#### **GENE J. TISCHER, ESQ.**

Has served as the Executive Director for the Home Care Association of Florida (HCAF formerly AHHIF) since 1993. In this role, he has offered consultation and advice to home health members and represented them on a state and federal level. He holds a J.D. from Georgetown University Law Center (1969), and operated a home health agency for thirteen years prior to his work with HCAF.

#### **STEPHEN TWEED, CSP**

has been a pioneer in the development of **Private Duty Home Care** in America. Through his extensive experience, research, and writing, he has been a leader in helping owners of **Private Duty Home Care** companies grow their businesses and get ready for the future. He was the opening keynote speaker at the first ever **Private Duty Boot Camp** sponsored by ... **home health line**, and was a featured speaker at many of their programs. He was the opening keynote speaker at the first two annual conventions of the **National Private Duty Association**, and helped their Board of Directors develop their very first association strategic plan. Stephen is the CEO of **Leading Home Care ... a Tweed Jeffries company**, based in Louisville, Kentucky. He is the Publisher of **Private Duty Today**, the national electronic newsletter for the Private Duty Home Care Industry. He can be reached at:

[www.leadinghomecare.com](http://www.leadinghomecare.com) or [www.privatedutytoday.com](http://www.privatedutytoday.com)

**JENNIFER WARFIELD, RN, BSN, HCS-D, COS-C**

Education Director, PPS Plus Software. As a registered nurse, homecare coding specialist (diagnosis), and certified OASIS specialist, Jennifer Warfield is an informational source for agencies seeking insight on the most up-to-date ICD-9 coding conventions and guidelines. Well known as an expert in her field, she frequently conducts educational seminars through PPS Plus Software's educational division, PPS Plus University ([www.ppsplusu.com](http://www.ppsplusu.com)) and has been a guest speaker at numerous home care conferences throughout the United States. Her expert knowledge plays an integral role in the analysis development of PPS Plus - Home Health Edition (HHE), a market leader in OASIS analysis software.

**JOEL WEINTRAUB**

Joel Weintraub is a "humorous educator" who has managed to merge the formerly disparate worlds of comedy, business and education. By combining his professional comedy experience with his masters degree in Exercise Physiology and his bachelors in Health Education from Temple University, Joel has entertained and educated audiences as diverse as Physicians, Nurses, Hospital Associations, Attorneys, Accountants, Superintendents, Dietitians, Cooperative Extension, the PTA and even Burglar Alarm Installers. From the "World Bank" to Dangerfield's Comedy Club to major radio stations, the local news and the Food Channel ... they have all laughed and learned with "Humor for the Health of it".

**RHONDA WILL, RN, BS, COS-C, HCS-D**

Assistant Director of Home Care Quality Institute Fazzi Associates Saint Leo University, Saint Leo, FL, BS in Health Care Administration 1998 Westmoreland School of Nursing Greensburg, PA RN 1970 Employed in home health care since 1979 in various clinical, administrative and management roles. Has extensive experience as a trainer. Works with agencies and state associations developing staff for various roles and responsibilities in home care through education and consultation. Developed training programs related to OASIS education, ICD-9 CM coding, case management, patient outcomes, regulatory compliance and home care orientation. She provided clinical leadership for the 2003 3M National OASIS Integrity Project, has developed a reputation in the home health industry as an OASIS Expert and is currently an editorial board member for Home HealthCare Nurse: The Journal for the Home Care and Hospice Professional.

**LAURA WILSON**

Holds an MBA from Florida State University has over ten years of experience with Florida LTC providers.