



TEXAS ~ NEW MEXICO
HOSPICE & PALLIATIVE CARE ORGANIZATION

Fall Hospice & Palliative Care Conference **Billing & Reimbursement | Leadership & Marketing**



Day 1 — Tuesday, Oct. 7, 2025

8:00 – 9:00 a.m. Breakfast

EARLY Bird Billing: 7:30 – 8:30 a.m. I've Just Been Certified... Now, How Do I Get Paid? | David Schuerman, Chief Operations Officer, Schuerman Business Consultants | You have just completed your survey, what is next? A discussion of timeline from survey to submission of claim 1 for each patient as well as the required documentation, election requirements, certifications and claim items to ensure accurate and timely payment. In addition will discuss high level CAP awareness for keeping your payments once you receive them.

BREAKOUTS - Session I – 9:00 – 10:00 a.m.

Billing 1 – Room: Veranda – Don't Go Overboard ~ Staying Audit-Ready in Hospice Care | Chris Gallarneau, Senior Education Consultant, MAC Legacy | Set sail with confidence as we explore what auditors are really looking for in hospice medical reviews. This session will break down the variety of hospice audits occurring, common audit triggers, and the critical role of a proactive audit response plan. Don't go overboard. Learn how to keep your hospice shipshape and fully audit ready.

Leadership 1 – Room: Music Hall – Preparing for the HOPE Tool: Leadership's Role in Organizational Readiness | Tracy Page, VP of Sales, Curantis Solutions | Beginning October 2025, the Hospice Outcomes and Patient Evaluation (HOPE) tool will become a required component of the hospice assessment process. This session is designed to help hospice leaders understand the significance of the HOPE tool and their critical role in preparing their teams for successful implementation. We'll explore what the HOPE tool measures, how it fits into quality reporting and care planning, and the operational shifts organizations may need to make. Attendees will gain practical strategies for leading change, fostering staff engagement, and ensuring their organization is equipped for compliance, efficiency, and improved patient outcomes.

BREAKOUTS - Session II - 10:15 – 11:15 a.m.

Billing 2 - Room: Veranda – Understanding Hospice CAP: Calculations, Timeframes & Requirements | David Schuerman, Chief Operations Officer, Schuerman Business Consultants | Does Medicare keep asking for money back? A detailed look at the CAP methodologies in place with Medicare, calculations of Medicare proportional CAP with multiple patient scenarios to ensure you can keep the money paid by Medicare.

Leadership 2 - Room: Music Hall – Panel Discussion: Building a High-Accountability Culture in Hospice Teams | Rosalind Nelson-Gamblin, Founder of RJNG Home Care Consulting, Robyn Chavez, CEO, Red Willow Hospice, and Demetress Harrell, CEO, Hospice in the Pines |

BREAKOUTS - Session III – 11:30 – 12:30 p.m.

Billing 3 - Room: Veranda – *Demystifying Hospice Cost Reports* | Amy Taylor, CEO, Knight Home Care Financial | Does the idea of preparing your annual Medicare cost report break you out in hives? it doesn't have to! In this session you will learn how to set up your accounting and other needed records so that at year-end, you have exactly what you need for your cost report. We will discuss what you can do throughout the year to simplify that process at year-end and lessen the stress on you and your team. We will cover the proper format for your Chart of Accounts, your payroll segregation and billing records so that everything is far more manageable come cost reporting time.

Leadership 3 - Room: Music Hall – *How to Avoid and Manage Governmental Scrutiny in an Era of Increased Competition* | Marie Berliner, JD, Reed Claymon | This session will address the intersection of marketing, ethics, and legal issues in the hospice industry as it becomes a more competitive and business-driven space. Topics will include recent trends under scrutiny by the OIG, such as unethical marketing practices, long lengths of stay, and improper patient transfers to maximize reimbursements. The speaker will also provide strategies for maintaining ethical marketing practices, improving documentation, and defending against governmental investigations related to these issues.

LUNCH 12:30 – 1:45 p.m.

BREAKOUTS – Session IV – 1:45 - 2:45 p.m.

Billing 4 - Room: Veranda – *Transfers, Appeals, ADRs & Dispute Resolution* | Colleen Bryan, MSNEd, RN, Chief Consulting Officer, JCC Texas | This session will guide hospice agencies through ensuring compliant patient transfers, appeal protocols, and dispute filing when transferring or receiving agencies fail to meet regulatory obligations. This session will also discuss current Additional Documentation Request (ADR) initiatives and how to prepare for them, with a focus on documentation that protects your agency, preserves patient rights, and supports successful payer-review audits.

Leadership 4 - Room: Music Hall – *Working Together: Bridging the Gap Between Clinical and Marketing* | Sarah Harris, CHSP, Managing Director of Marketing, Visiting Nurse Association of Texas | This presentation highlights the importance of fostering collaboration between clinical and marketing teams in hospice care. It emphasizes strategies for improving communication, understanding each team's unique contributions, and creating a unified approach to patient care and outreach. By aligning goals and efforts, both teams can enhance patient experience and organizational success, while working to attract new business, retain existing clients, and secure future growth opportunities.

BREAKOUTS – Session V – 3:00 - 4:00 p.m.

Billing 5 – Room: Veranda – Hospice Billing & Documentation: Let's Work Together to Bill and Document Right the First Time!

Speakers: Charles Canaan, RN & Dan George, Palmetto GBA

This informative session brings together billing and documentation best practices to support compliant, accurate hospice claims. Attendees will learn how to properly bill after an election is opened, including guidance on transfers, submitting monthly claims, coding for levels of care, and other key billing requirements. In addition, the session will cover how to effectively document the terminal status of a hospice patient, meeting the regulatory expectations of the Hospice Medicare Benefit. Join us as we work together to improve accuracy and compliance—right from the start.

Leadership 5 - Room: Music Hall – Transforming Hospice Care: Harnessing AI for Compassionate Excellence | Lenny Jensen, MSN, FNP-C, CEO of Firenote. This insightful session covers AI integration in clinical operations, HR, financial management, staff training, and EMR compliance, ensuring adherence to HIPAA, CMS, and other regulations while prioritizing compassionate care. Perfect for hospice leaders, staff, and stakeholders committed to innovative, compliant end-of-life solutions.

Day 2 — Wednesday, Oct. 8, 2025

8:00 – 9:00 a.m. Breakfast

BREAKOUTS – Session VI – 9:00 - 10:00 a.m.

Billing 6 - Room: Veranda – Private Pay vs Medicaid vs Medicare: Credentialing, Contracting, Pre-auths & More | Delaine Henry, CEO, Advanced Revenue Cycle Management (ACRM) and Nikki Dennis, AAPC, Head of Contracting and Credentialing, ACRM | Communication and research are vital to setting up efficient contracting and reimbursement processes. Proficient contracting and credentialing processes on the front end will set hospices up for success when billing and collecting from various insurances on the back end.

Leadership 6 - Room: Music Hall – How to Stay Out of the Weeds: Strategies for Strategic Leadership| Lainie Caldwell, RN, BSN, Managing Director at VNA Hospice, and Michelle Donnell, RN, Managing Director at VNA Hospice, South | Discover practical tactics to escape the “quicksand” of day-to-day operations. Learn how to streamline routine tasks, delegate effectively, and carve out space for high-impact initiatives that drive growth and innovation in your hospice agency.

General Session – 10:15 – 11:15 a.m.

Billing 7 – Room: Veranda – How Managed Care will Affect Hospice – Destiny Quiñones, BSW, CEO, Managed Care Consultants | This session will explore emerging trends in the managed care space and how these shifts impact hospice agencies operationally and financially. Attendees will gain insights into navigating payer expectations and preparing for what's ahead.

Leadership 7 - Room: Music Hall – Hospice Myths: Overcoming Misconceptions to Encourage Early Referrals, Lee Grumbles, M.D., Medical Director at Grumbles Geriatric Home Visit Program | Hospice staff will learn to influence earlier referrals by addressing common myths and misconceptions that cause referring physicians to hesitate. Participants receive evidence of the patient benefits of timely hospice involvement, learn how to reframe hospice in referral conversations, and take away ready-to-use talking points and clinical triggers to prompt action.

CONFERENCE INFORMATION

TX Joint Accreditation Statement



In support of improving patient care, this activity has been planned and implemented by Amedco LLC and Texas New Mexico Hospice & Palliative Care Organization. Amedco LLC is jointly accredited by the Accreditation Council for Continuing Medical Education (ACCME), the Accreditation Council for Pharmacy Education (ACPE), and the American Nurses Credentialing Center (ANCC), to provide continuing education for the healthcare team. Amedco Joint Accreditation Provider Number: 4008163 Professions in scope for this activity are listed below.

Physicians

Amedco LLC designates this live activity for a maximum of 7.00 AMA PRA Category 1 Credits™ for physicians. Physicians should claim only the credit commensurate with the extent of their participation in the activity.

Nurses

Amedco LLC designates this activity for a maximum of 7.00 ANCC contact hours.

Target Audience: CEOs, CFOs, Hospice Leaders, Marketing/Sales Staff, Administrators, Billers, HR, Compliance staff, Nurses and Support Staff

Overview:

The TNMHPO Fall Hospice & Palliative Care Conference — Billing & Reimbursement | Leadership & Marketing is a focused, dual-track event bringing together hospice leaders, billers, administrators, and clinical staff to strengthen both the financial and strategic sides of care. Attendees will get practical, timely guidance on audit readiness, reimbursement mechanics (including CAP, cost reporting, transfers/appeals, and managed care), and the operational leadership and marketing practices needed to advance their organizations. The program also addresses referral optimization—equipping hospice teams to influence earlier, appropriate hospice engagement by dispelling myths and improving communication with referring clinicians. This combination ensures agencies leave better positioned for compliance, sustainable growth, and improved patient outcomes.

Learning Objectives / Outcomes:

- Identify and prioritize common audit triggers and outline a proactive response plan to maintain audit readiness in hospice operations.
- Explain the requirements and leadership actions needed to prepare for the HOPE tool implementation and drive organizational readiness.
- Interpret Hospice CAP calculations and cost reporting best practices to retain payments and simplify year-end financial workflows.
- Apply compliant billing, documentation, transfer, appeals, and ADR processes, including credentialing and managed care implications, to optimize revenue cycle performance.
- Develop and reinforce a high-accountability culture while integrating ethical marketing and responsible use of innovation (such as AI) to protect against scrutiny and support sustainable growth.
- Use tailored talking points and clinical triggers to address hospice misconceptions and influence providers toward earlier, appropriate hospice referrals.

Texas & New Mexico Hospice Organization is an approved provider of continuing education for Hospice Administrators by the Texas Health and Human Services Commission.

CANCELLATION POLICY:

Cancellations received by email, on or before 5:00 p.m. on September 16th, 2025, will be entitled to a refund, less a \$25 administrative fee. Cancellations after September 16th, 2025, and conference “no-shows” forfeit their entire registration fee. Substitutions are welcome.

Please advise TNMHPO by email at kparker@txnmhospice.org if a substitute will be attending in your place. Telephone cancellations CANNOT be accepted.