



**Thursday, May 30**

12:00 pm – 12:45 pm

**Registration**

12:45 pm – 1:15 pm

**Welcome**

NC HIMSS & NCHFMA Presidents

1:15 pm – 2:15 pm

**EMERGING TECHNOLOGY IN HEALTHCARE**

**Rajiv Sabbharwal & Sidd Bhattacharya, PwC**

Provide an introductory-level overview of major emerging technologies impacting the healthcare industry, including underlying theories and technology solutions, as well as anticipated market-facing trends in the deployment of these technologies.

**Objectives:**

- Identify emerging technologies in the healthcare space.
- Review case studies on AI, blockchain, IoT, virtual and augmented reality.
- Discuss PwC's emerging technology presence.

**Rajiv Sabbharwal** is a principle in PwC's Health Industries Advisory practice. He has built and sold multiple products in healthcare and life science space in addition to servicing large government and commercial clients. His work has primarily focused on products supporting EMR/EHR, healthcare exchanges, ACO, value-based care, big data and associated analytics, clinical trials, and patient/member-centric solutions.

**Sidd Bhattacharya** is a principle in PwC's Health Industries Advisory practice. He has built and sold multiple products in the healthcare and life science space in addition to servicing large government and commercial clients. His work has primarily focused on products supporting EMR/EHR, healthcare exchanges, ACO, value-based care, big data and associated analytics, clinical trials, and patient/member-centric solutions. Sidd is a director in PwC's Pharma & Life Sciences practice based out of Philadelphia. He combines 10+ years of business and technology consulting experience in pharma R&D with AI experience ranging from strategy to large scale product development and implementation.



2:20 pm – 3:50 pm

### **REVENUE CYCLE LEADERSHIP PANEL**

*Moderator:* **Christine Sibley Hart**, Atrium Health  
**Garland Goins Jr.**, Duke University Health System  
**Matt Castellano**, UNC Health Care  
**Roman Perun**, Duke University Health System  
**April York**, Novant Health

Panelists will discuss the challenges and successes affecting North Carolina healthcare financial and technology revenue cycle professionals.

#### **Objectives:**

- Learn the latest healthcare revenue cycle challenges from financial and technology perspectives.
- Learn the latest healthcare revenue cycle successes.
- Learn about potential revenue cycle trends.

**Christine Sibley Hart** is assistant vice president of reimbursement for Atrium Health in Charlotte. She's also a contributing faculty member for the University of St. Augustine for Health Sciences. A member of the North Carolina HFMA, Christine earned the Certified Healthcare Financial Professional (CHFP) designation in 2008 and the Fellow of the Healthcare Financial Management Association (FHFMA) designation in 2015. She has served in various chapter leadership roles including director of education, director of management practices, and compliance committee chair. She has been co-facilitator of the NCHFMA Healthcare Finance Bootcamp for many years. Christine will assume the role of treasurer for the 2019-2020-chapter year.

**Garland Goins Jr.** is the health system director of revenue and documentation integrity for Duke Health. He's responsible for the preservation and enhancement of Duke Health's revenue through oversight and integration of mission-critical departments in clinical trials research billing, charge and revenue integrity and coding quality assurance. Garland has held progressive leadership roles in the revenue cycle for academic medical centers for over 14 years and is an active local and national member of HFMA, AAPC, NAHRI, and AHIMA.

**Matthew Castellano** is a system executive director for information services at UNC Health Care System, responsible for the enterprise business and revenue cycle application portfolio and the IT Innovation Program. In his 18 years at UNC, Matthew has been involved in various transformational technology initiatives bringing automation and solutions to the overall revenue cycle and enterprise resource planning operations. Current initiatives include meaningful use of mobile platforms and overall patient and provider engagement activities. Matthew serves as the 2<sup>nd</sup> vice president on the North Carolina Healthcare Information & Communications Alliance (NCHICA) board.



**Roman Perun** has 30 years' experience working in design, deployment, and support of revenue cycle IT solutions. He is currently a director in the Duke Health Technology Solutions group, overseeing a team of IT professionals responsible for providing new clinic acquisition and provider concierge services, deployment and support of the Epic Revenue Cycle suite of applications, and Hyland OnBase, EDCO/Solarity, Extract Systems/LabDE, and eHealth in support of content and document management.

**April York** is senior director of acute revenue cycle services for Novant Health, an integrated system of physician practices, hospitals, outpatient centers. She's directly responsible for enhancing the process capability and ensuring the integrity of Novant Health's acute revenue cycle system net revenue of \$3 billion annually. Certified in Epic HB administration, April recently led its successful operational implementation for Novant Health. She has spoken at state, regional and national levels regarding healthcare revenue cycle topics of interest and participates in multiple healthcare industry forums. April currently serves as board president of the North Carolina Chapter of HFMA.

3:50 pm – 4:00 pm

#### **Networking Break**

4:00 pm – 5:30 pm

#### **HEALTHCARE LEADERSHIP PANEL**

*Moderator: Tim Lea, Healthcare Systems Consulting, Inc.*

**David Ziolkowski**, Person Memorial Hospital

**Rasu Shrestha, MD**, Atrium Health

**Carla Parker Hollis**, Triangle Springs Hospital

Panelists will discuss the challenges and successes affecting North Carolina healthcare operational leaders.

#### **Objectives:**

- Learn the latest healthcare leadership challenges directly from the leaders themselves.
- Learn the latest healthcare leadership successes.
- Learn about potential healthcare leadership trends.

**Robert Timothy Lea** is founder of Healthcare Systems Consulting, Inc. His extensive political, business, and community service experience includes serving on the North Carolina Courts Commission and the Moore County Board of Commissioners. Tim is a long-standing member of HFMA, having received a Founders Medal of Honor and Muncie Gold Medal Award for Outstanding Service to HFMA. In 2016, he was awarded the prestigious Order of the Long Leaf Pine by Gov. Pat McCrory for exemplary service to the State of North Carolina.



**David Ziolkowski**, CEO of Person Memorial Hospital, has a strong leadership background in hospital administration that spans both coasts. He previously served as COO of Saint Joseph Health–Sonoma County, and was senior director of hospital affiliations and market development for Duke University Health System. In his role at Duke, David was instrumental in the development and successful launch of Duke LifePoint Healthcare, of which Person Memorial Hospital is a part. He earned a master’s degree in healthcare administration from the University of Minnesota in Minneapolis.

**Rasu B. Shrestha**, MD, MBA, is executive vice president and chief strategy officer for Atrium Health. As a member of the executive leadership team, he is responsible for Atrium Health’s enterprise strategy, including planning and tactical direction for the organization’s current strategic roadmap and beyond. Additionally, he spearheads a renewed focus on innovation, launching new healthcare inventions, discoveries, and ideas to benefit patients and the communities. Dr. Shrestha is a respected thought leader and visionary in the field of healthcare information technology and was recently recognized as “Executive of the Year” by Healthcare Dive and was acknowledged as one of the “Top 20 Health IT Leaders Driving Change” and as a “Top Healthcare Innovator” by *InformationWeek*. He serves on the board of HIMSS.

**Carla Parker Hollis** has over 20 years of executive-level experience in health care. She currently serves as CEO of Triangle Springs Hospital, a 77-bed behavioral health and chemical dependency facility located in Raleigh. Most recently, Carla served as president and CEO of Columbus Regional Healthcare System, a 154-bed hospital managed by Carolinas HealthCare System. Her prior healthcare experience comprised of leadership roles at Duke University Health System including chief strategy officer, vice president of operations and interim president.

5:30 pm – 6:30 pm

**Networking Reception**



## Friday, May 31

7:00 am – 8:00 am

### Registration & Breakfast

8:00 am – 9:00 am

### MANAGING HEALTHCARE-RELATED VENDOR & BUSINESS ASSOCIATE RISKS

**Zach Shelton & Tyler Leach**, DHG IT Advisory

Business associate relationships are vital to the management of electronically-protected health information. New and expanding relationships bring increased challenges to both the business associate and related covered entity. This presentation will assist business associates of healthcare entities through real-world scenarios of compliance reporting and implementation of service organization controls reports and Health Information Trust Alliance (HITRUST) frameworks.

#### Objectives:

- Discuss contract and business associate agreement management
- Assess and mitigate risk associated with being a business associate
- Analyze compliance reporting requirements and methods
- Identify considerations for staying up-to-date on compliance requirements and changes

**Zach Shelton**, CISA, is a principal at DHG IT Advisory with 14+ years of experience in information technology including 11 years with DHG IT Advisory. For clients in a variety of industries, he manages technology risk and controls assessments, SOC reporting, SOX compliance, HIPAA and GLBA privacy compliance, business process analysis, and internal audit assistance engagements.

**Tyler Leach**, CISA, CCSFP, is a manager at DHG IT Advisory with experience in IT Sarbanes-Oxley compliance (internal/external), FDICIA IT internal control attestation, SOC 1 (SSAE 18) and SOC 2 attestation, internal IT audit and IT risk assessments, IT review for external audits and PCI DSS compliance; client base primarily consists of technology, healthcare providers and financial institutions.

9:00 am – 9:15 am

### Networking Break



9:15 am – 10:45 am

### **TECHNOLOGY LEADERSHIP PANEL**

*Moderator:* **Gail Hinte**, Himformatics

**James Kluttz**, Novant Health

**Geoff Lawson**, Cone Health Information & Technology Services

**Joe Norris**, New Hanover Regional Medical Center

**Brent Lamm**, UNC Healthcare

Panelists will discuss the challenges and successes affecting North Carolina healthcare technology leaders.

#### **Objectives:**

- Learn the latest healthcare technology leadership challenges.
- Learn the latest healthcare technology leadership successes.
- Learn about potential healthcare technology leadership trends.

**Gail Hinte** is a partner at Himformatics, a national healthcare technology consulting firm and leads the Carolina practice. She brings a wealth of experience assisting health care executives with information systems initiatives to support the organization's strategic business plan. She has led numerous engagements in strategic planning, process redesign, system selection, and implementation, and has provided project management and interim management support. Based in North Carolina, Gail is well versed in statewide initiatives and serves as is an NCHICA board member.

**James Kluttz** is a senior information technology executive with over 30 years' experience in healthcare, including clinical, finance, technical architecture, operations, communications, business intelligence, and end user support. A technology champion and innovator who builds relationships that enable trust and confidence to empower the business to deliver the highest quality of care and service to its patients. James earned a BS degree in information technology and an MS degree in leadership from Walden University. He lives in Stanfield, NC with his wife and daughter.

**Geoff Lawson** is the vice president, chief technology officer, and chief information security Officer of Cone Health. He is responsible for the creation and maintenance of innovative, secure, and resilient technology platforms. He is also responsible for the delivery of world class customer service to support Cone Health staff in their mission to care for patients. He joined the health system 2012. After his military service as a nuclear-trained submarine officer, he worked in various IT leadership positions across multiple industries. Geoff is past president and current board member of the North Carolina Healthcare Information & Communications Alliance, better known as NCHICA.



**Brent Lamm**, MBA, serves as vice president and deputy chief information officer for the UNC Health Care System. In this role, he has responsibility for the enterprise application portfolio, IT project management office, and data and analytics infrastructure supporting the system. Brent also serves as the associate director of biomedical informatics for the North Carolina Translational and Clinical Sciences Institute (NC TraCS) at UNC. Before joining UNC, Brent served for 10+ years in various technical leadership, IT architecture, and software development roles in the Global Services and Software Group divisions of IBM. During this period, he worked extensively with clients in various industries, including financial services, health care, manufacturing, and telecommunications.

**Joe Norris** is currently the vice president and CIO for New Hanover Regional Medical Center, overseeing the information services division that delivers innovative solutions in support of consumers, physicians, clinicians, and staff. His current focus is transitioning the organization to a digital services strategy with an ever-increasing emphasis on cybersecurity programs and innovation. Joe currently serves as a member of the UNC Wilmington Information Systems Advisory Board, and the ECU College of Engineering & Computer Science Council, and Health Informatics Advisory Board.

10:45 am – 11:00 am

**Networking Break**

11:00 am – 12:30 pm

**FINANCIAL LEADERSHIP PANEL**

*Moderator:* **Ken Vance**, Bank of America Merrill Lynch

**Rick Carrico**, WakeMed Health & Hospitals

**Brian Dunn**, Vidant Health

**Kevin May**, Appalachian Regional Healthcare System

**Jeff Wakefield**, Marion General Hospital

Panelists will discuss the challenges and successes affecting North Carolina healthcare financial leadership professionals.

**Objectives:**

- Learn the latest healthcare financial leadership challenges.
- Learn the latest healthcare financial leadership successes.
- Learn about potential financial leadership trends.

**Ken Vance** is a senior vice president with Bank of America Merrill Lynch in its Healthcare, Education, and Not-For-Profit (HENFP) Industry Group. He manages the healthcare practice in the Carolinas and coordinates a dedicated healthcare team focusing on four key service areas: revenue cycle solutions; capital markets solutions, institutional investment solutions; and human resource solutions. His primary focus is on not-for-profit acute care hospitals and long-term care, principally continuing care retirement communities and skilled nursing facilities.



Ken is a past president of the North Carolina Healthcare Financial Management Association and is presently HFMA Region 4 Executive-Elect.

**Richard F Carrico**, CPA, MBA, is executive vice president and CFO of WakeMed Health & Hospitals in Raleigh. As CFO, Rick is responsible for the overall financial and accounting functions, including planning, financing, analytics, strategic sourcing, revenue cycle and ACO governance including managed care contracting. He is on the governing boards of Wake Key Community Care (ACO), Provider Led Patient Care LLC, PM Pediatrics/WakeMed JV, Technical Advisory Committee for North Carolina Hospital Association and Premier's Academic Innovation Alliance.

**Brian Dunn**, CPA, is VP of financial services at Vidant Health. His areas of responsibility include corporate and general accounting, payroll, treasury services, accounts receivables reserves, and cost reporting. Prior to Vidant Health, Brian spent 11 years in public accounting as an audit manager serving clients in all types of industries with experience in governmental, non-profit and healthcare. He is a member of the American Institute of Certified Public Accountants and NCHFMA and serves on the boards for Advanced Home Care and Access East, as well as the Accounting Advisory Group for ECU's Department of Accounting.

**Kevin May**, SVP of finance and chief administrative officer of Appalachian Regional Healthcare System, has 35 years' experience in healthcare finance, operations, and administration. An active member of various community boards, he is also a Fellow of the Healthcare Financial Management Association.

**Jeff Wakefield** is CFO of Marion General Hospital. His more than 20 years of healthcare financial experience includes capital planning, cost reporting, contract management (negotiations and reimbursement management), revenue cycle, cost accounting, budget, productivity reporting, and physician practice financial management. He specializes in HUD reporting as well as accounting for major construction projects.

12:30 pm

**Symposium Concludes**