



Overview Schedule and Session Descriptions

(Updated 08/22/2017)

Monday, September 11th	Pre-Conference Training Sessions begin at 1 p.m. (http://www.carevoyant.com/training.aspx)
Tuesday, September 12th	Pre-Conference Training Sessions from 9 a.m. to 5 p.m. Pre-Conference Kick-Off Pizza Party 6 p.m. to 8 p.m. At Moretti's Schaumburg
Wednesday, September 13th	Registration 9 a.m. to 9:30 a.m. Opening Sessions 9:30 a.m. to Noon Lunch Noon to 1 p.m. Breakout Sessions 1 p.m. to 5 p.m.
Thursday, September 14th	Breakout Sessions 9 a.m. to 12 p.m. Lunch Noon to 1 p.m. Breakout Sessions 1 p.m. to 4:50 p.m. Mexican Fiesta Dinner at the Embassy 6 p.m. With the band Exit 147 7 p.m. to 10 p.m.
Friday, September 15th	Breakout Sessions 9.30 a.m. to 11.30 a.m. Closing Session 11.30 a.m. to Noon

Below are the tracks and descriptions for the User Group Conference, September 13th – 15th.

Keep in mind that all attendees are welcome to attend any sessions.

*This is an updated draft and some speakers and topics are still pending so check back regularly, as this session list will be updated as new speakers are confirmed!
Note that all sessions are subject to change.*

All Tracks

Opening Session: Kandasamy “Pasu” Pasupathy

- Year in review
- Update on new enhancements
- Certification and Meaningful Use Update
- Roadmap for 2017/2018

Assessment Building

A popular repeat session! Learn the basics on how to build custom forms in CareVoyant for clinical documentation in CareVoyant. See how it’s done and get the tools you need to get started! Presented by the CV Implementation team.

Clinical Roundtable

Back by popular demand, the roundtable will give all of you an opportunity to sit at a table with your peers and discuss how you use the CareVoyant clinical applications. Discussions will include what features of clinical you use as well as areas you would like to see enhanced.

Configuring Dashboards

The Dashboard module is one of the most underutilized modules in CareVoyant. Sit in on this session to learn about what’s available in the Dashboards and how to configure them

Configuring Events and Alerts for your organization

Events and Alerts is one of our most popular features, and this session will look at some of the most effective alerts that can benefit your organization, and how they can be deployed.

CV Messaging

Curious about the new CV Messaging? Learn what it is and how to use it at this informative session. Note that messaging is used in the main CareVoyant application as well as in the Intuitive and Mobile apps.

Deep Dive Into Eligibility

Find out how eligibility works with our clearinghouse partners and learn more about the new screens that have been introduced to look similar to what is seen on partner websites. Instant eligibility, batch eligibility and the setup will be reviewed in depth.

eBriggs

Have you heard about the new partnership between Briggs and CareVoyant? Attend this session to learn more about how CareVoyant will be incorporating eBriggs to improve our user experience with assessments in clinical documentation.

Family Portal

The CareVoyant Family Portal enables Home Health/Home Care agencies to allow patients and families to access their records and communicate with the agency using a secure and HIPAA compliant portal. CV Inbox will be available through the Portal to communicate with the agency. Even if you are not a Home Health Agency join this session as it will become available later for Outpatient and Long Term Care.

Financial Roundtable

A popular first time session last year, the roundtable will give all of you an opportunity to sit at a table with your peers and discuss how you use the CareVoyant application from start to finish (eligibility, charge capture, claims, collections, reporting, etc.).

Intake/Scheduling Roundtable

Back by request, the roundtable will give all of you an opportunity to sit at a table with your peers and discuss how you use the CareVoyant application for intake and scheduling. Discussions will include what features you use like PreAdmit, Eligibility, etc. and what you would like to see as enhancements in those areas.

Making the best use of Zendesk and CareVoyant Support

CareVoyant staff members will share tips and tricks on how to help us give you the best support through use of the customer portal on Zendesk.

Mental Health Providers Trends and Topics

Moderated by a guest panel to discuss issues, share problem solving strategies and ideas with other users and CV development and implementation team members. To be discussed: clinical and operational challenges of agencies who provide Mental Health Services. For outpatient and homecare based mental health providers. Facilitated by Susan Martin and James Jensen from Optimae LifeServices.

Paylocity

Attend this session to hear more about the payroll and human resources management functions that our newest partner, Paylocity offers.

Reporting Services Reports and Report Scheduler

Review of Reporting Services Manager and an in-depth look at the under-utilized Report Scheduler introduced previously.

ZirMed Presentation

Attend this session to learn more about the ZirMed Denials Management Solution. With this solution, you can track and manage denial workflow from start to finish, quickly access all data and drill down as needed, transparently oversee team and user productivity, and understand the types of denials being worked. Presented by Amy Blackburn, Strategic Account Management, ZirMed.

Technical/Integration Track

CareVoyant Hosting

Introduction to and information regarding the CareVoyant hosting environment. This is a good session if you've been thinking about moving your installation of CareVoyant to a hosted where you don't have to keep up with the latest equipment and versions of operating systems, SQL, etc. Presented by CareVoyant technical staff.

Database Structure in CV for report writing and Events and Alerts

A review of the tables you need to get you a jump start on successfully design your own reports, plus a look at how to modify existing CareVoyant reports. Also, a review of SQL statements that are the drivers of the Events and Alerts system. Presented by the CareVoyant development team. (If you want an in-depth look at this, look at the training session offered prior to the conference.)

Maintaining and Optimizing your CV Instance on SQL

This session will focus on best practices and tips for your SQL instance and databases. Presented by the CareVoyant technical services staff.

Tech Corner

Bring your questions and ideas for this Open Forum with our Tech Services staff

Also to be covered: SQL Versions supported, Mobile Device Questions, CV Messaging configuration, NFC and more.

Outpatient/Physician/Medical Billing Track

New features in CareVoyant for Outpatient

Many new features have been introduced in the past year and a half, and others are on the way. This session will highlight many, including: the new Patient Inquiry, Patient Intake, Cash Posting changes, CV Messaging and new reports.

Outpatient Clinical and the Intuitive App

If you're using outpatient clinical documentation or just thinking about it, this session will concentrate on the new outpatient Intuitive app. Presented by CareVoyant staff

Overview of Outpatient Scheduling

In the last two years, many enhancements have been made to Outpatient Scheduling module including a complete change to the Referral In module now called Authorizations. This session will include a brief overview of scheduling with a concentrated focus on the new changes.

Upcoming Features/Networking/Sharing session for Outpatient

A discussion of upcoming features for Outpatient in CareVoyant like eFax, browser based clinical documentation and more. Next, bring your best ideas, questions, resources, forms you've developed, reports you've developed and this session will allow for sharing of resources and ideas.

Home Health/Home Care/Hospice Track

CareVoyant Intuitive for Home Health

Intuitive is the Windows App-based Point of Care solution from CareVoyant. This session will give you the opportunity to touch and feel the application on tablet device and learn what is new in the last year. Offline synchronization and CV Messaging will also be reviewed.

CareVoyant Mobile including Home Health Aide Care Planning

This session will review the setup and entry of the Home Health Aide Care Plan as well as related reports. HHA documentation with the new CareVoyant Mobile App will also be shown including new changes that have been made since last year.

CareVoyant Telephony Powered by Dial-n-Document

Did you know that CareVoyant now offers telephony service? Attend this session to learn more about this new partnership and how it can be useful for your agency. Presented by CareVoyant's Martin Edgar and Dial-n-Doc representatives.

Hourly Home Care Trends and Topics

Moderated by a guest panel to discuss issues, share problem solving strategies and ideas with other users and CV development and implementation team members. To be discussed: clinical and operational challenges of agencies who provide private duty, hourly, extended hourly services through Medicaid private pay. The Development team will be on hand for feedback and idea suggestions.

Value Analysis of a Home Health Episode: A Step-By-Step Guide to Successful Outcomes

A favorite speaker from last year is returning. The focus of recent healthcare reform efforts for CMS Providers is the shift from "Volume to Value", and that includes Home Health agencies who deliver care to homebound clients. A review of the latest program updates all reveal a consistent effort to address and improve the value quotient of homecare services; rebasing, value-based purchasing (VBP), pre-claim review, and Alternative Payment Models (APM). In addition, other proposed refinements, such as Episodic Bundling for ACOs, reflect a value – based expectation from Home Health Providers.

HHSM presents the development of a Value – Based Home Health episode in this progressive presentation. By employing a chronologic, step – by – step review of the value construction of a contemporary homecare program, attendees can identify opportunities to evolve their care programs in value terms. From Intake to Admissions, OASIS to POC, Care delivery to In – Episode Management, Patient Satisfaction to quality Discharges; all aspects of the Home Health episode are addressed in terms of compliance with The Medicare Benefit Policy Manual Home Health Chapter 7.

The panel of presenters will outline how they assure the value development of Home Health programs, including the production of care targets and program delivery paths that are managed towards a greater than 4.0 Star Rating along with desired Patient Satisfaction scores. Case Studies and Interactive demos are employed; don't miss this important opportunity to gain insight into value care production. Presented by Kimberly McCormick, Executive Clinical Director and Melissa Couty, Home Health Clinical Director from Home Health Strategic Management.

How Best to use Google Travel Options in CareVoyant/ Employee Portal App for Home Care

In the last year, we have introduced many options that utilize Google services either through distance for searches, travel miles for Verifying Schedules or seeing where the employee is currently at in the Schedule Monitor. This session will review these areas and point out the potential cost advantages for utilizing this service. Also get a preview of the new app being developed for employees. They will be able to view schedules, shift offers, and more!

New features in CareVoyant for Home Care

Trusted NFC Tags for Visit Verification

Learn more about NFC (Near Field Communication) tags and how they will work with the CareVoyant Mobile app for visit verification in your patient's home.

New and Upcoming Enhancements for Home Care

Many new features have been introduced in the past year, and others are on the way. This session will highlight many, including updated Patient Inquiry, Cash Posting Enhancements, Schedule Charge Creation enhancements, CV Messaging, and much more. Hear about upcoming changes like the exciting new Scheduling changes, eFax, and browser based clinical documentation.

Long Term Care Track

Long Term Care Clinical Implementation Case Study

Hear about how one pediatric Long Term Care Facility implemented their clinical documentation. They will review how they did it and tips and trips for what helped and what didn't. Presented by Steve Bargar, Administrative Manager and Kristina Huntsman, Director of Health Information at ChildServe, Inc.

Long Term Care Clinical Tips and Tricks

Review of LTC Clinician Desktop features and setup of buttons and icon for best use. Review of use of text builder for standardizing documentation and using measurements for tracking clinical items.

New features in CareVoyant for Long Term Care

Many new features have been introduced in the past year, and others are on the way. This session will highlight many, including Patient Intake, updated Patient Inquiry, Cash Posting Enhancements, CV Messaging, and new reports.

The RoPs are Here – Are You Ready?

Join us on to look at the details of the updated Requirements of Participation (RoPs) that became effective November 28, 2016. These RoPs – also known as the Mega or Final Rule – are the 1st comprehensive changes made to the requirements for long-term care providers participating in the Medicare and Medicaid programs since 1991.

During this session, you'll learn:

- The CMS goals behind these updated regulations
- Implementation and timelines
 - Phase 1 focus areas
 - Phase 2 focus areas
 - Phase 3 focus areas
- Tips on working with these RoPs
- Valuable resources

Presented by Mary Madison, RN, RAC-CT, CDP Clinical Consultant, LTC/Senior Care Briggs Healthcare

The Survey Process is Changing – Will You Be Ready?

Do you know that the long-term care survey process is changing this November? Do you know that we will have all new F-Tags? We invite you to join us to examine what this new survey process looks like and how we can start preparing for this change. During this session, you'll learn:

- A brief history of the LTC survey process to date
- What the new survey process involves and when it will start
- New F-Tags and the crosswalk between the old and new tags
- Tips on how to prepare for the new survey
- Valuable resources

Presented by Mary Madison, RN, RAC-CT, CDP Clinical Consultant, LTC/Senior Care Briggs Healthcare

Upcoming Enhancements, and Peer to Peer Networking For Long Term Care

Bring your best ideas, questions, resources, forms you've developed, reports you've developed and this session will allow for sharing of resources and ideas. Also to be discussed: LTC Intuitive Clinical App and other upcoming changes like eFax, and browser based clinical documentation. Presented by the CV Implementation team.

Dynamics GP University

Presented by Rob Gillespie, Premier Computing, Inc.

Dynamics-GP Independent Software Vendor's Budgeting and Module Enhancements

This session will focus in providing information regarding tools from Independent Software Vendors to provide Enterprise Level budgeting and reporting, as well as other ISV Tools to assist with processing various other functions within GP, i.e., Alba Spectrum AutoPosting Server. A listing of these ISV products will be reviewed and provided to all attendees. This is an informative class only, as no demonstrations will be provided during this session.

GP 2016 Employee Self Service (ESS) and Work Flows

This session continues part of the Payroll and Human Resources session. It will focus on the out-of-box features and new work flows included within GP. Learn more about how a Payroll and Human Resources person can delegate HR routines through Work Flows, provide on-line information to employees to access their individual payroll information, and other things. The ESS module will help to reduce costs of mailing payroll information to employees.

GP 2016 General Ledger Overview

This session will focus on the core functionality of the GP General Ledger, with lessons surrounding how to use the Mass Change features. Learning about how to use the Copy-and-Paste function, how Fixed and Variable Allocations work, as well as other features of the General Ledger, to help an end-user more efficiently use the GL module. Learn how to set up a Budget and your EFT for Accounts Payable and eBank Reconciliation will also be discussed.

GP 2016 Home Page Features

We will focus on teaching the end-user how to take advantage of many of the out-of-box features of the home page. You'll learn how to modify your own home page to work more efficiently for the individual user. Taking advantage of many of the Home Page features will make you a Home Page "wizard" enabling you to help other's in your organization.

GP 2016 Native Business Intelligence Tools

Learning how to take advantage of the built-in reporting tools will be the primary focus of this session. Focusing on how to take advantage of the GP Business Analyzer, Management Reporter, Excel Reports, Standard Reports and SmartList Designer will be the primary focus of this session.

GP 2016 Payroll and Human Resources

This session will focus on features that will assist the Payroll and Human Resources directors to take advantage of the myriad features already included in the Payroll and Human Resources modules. Managing onboarding processes, terminations, annual reviews, property and many more functionality will be part of this session. You will also learn about how to turn on the Pre-Payroll Report so you can see exactly what will post, prior to actually doing a payroll run.

GP Professional Services Tools Library commonly known as the PSTL

This session is a must for all GP users. There are many tools available in the PSTL module so this session will focus mainly on the tools that will help streamline the General Ledger, Accounts Payables, Payroll, Human Resources and IT Manager Roles.

GP Tips and Tricks.

The GP Tips and Tricks sessions have always been well attended. Due to time, we'll be compacting the Tips and Tricks into a single hour, but we'll focus more on tips that will help the day-to-day GP user.

Greenshades Payroll Tax Services

Dylan Kantzler and his team from Greenshades, will remotely log in and provide this session. Greenshades offers a wealth of tax reporting services and many more services, including time and attendance tracking solutions. This session will help the Payroll and Human Resources employee to more efficiently learn how to utilize the modules to make their jobs easier. Greenshades can even file your tax returns and provide Employee Self Service features, and much more.

Increasing Employee Financial Wellness – Integrity Data - Guest Speaker – Ilyce Glink.

We will focus this session towards the needs of the C-Level and HR staff. Studies show that 63% of most employees don't have \$500 in savings, which causes financial stress for them. This session will help your company to reduce your employees' financial stress and get them back to focusing on your business. Join Ilyce Glink, award-winning syndicated columnist and radio show host and founder of Best Money Moves, to find out how you can help your employees identify their level of financial stress and dial it down, to create a more productive, more engaged and healthier workforce. This will ultimately reduce your hidden employee costs from absenteeism, low self-esteem and lost productivity.

Integrity Data – Comprehensive Leave Manager overview

Integrity Data will remotely provide this session. It will help your Payroll and HR staff better learn to deal with dealing with complex leave management scenarios, multiple user-defined leave codes, carry-over rules, complex rules dealing with waiting periods, and much more. A handout will be provided that delineates how the Comprehensive Leave Manager can help manage these complex processes.

myStaffingPro - Recruitment and Onboarding for Dynamics-GP

This remotely enabled session focuses on the Human Resources employee, providing a SaaS solution for Applicant Tracking and Onboarding into Dynamics-GP. MyStaffingPro offers a wealth of features to streamline the onboarding processes, and once completed, seamlessly links to Dynamics-GP Human Resources and Payroll. They offer a candidate-friendly experience, robust configurability, and award-winning service. MyStaffingPro is a comprehensive, Web-based applicant tracking system (ATS) offering full-featured candidate sourcing, screening, and tracking. Their SaaS model makes their system accessible from anywhere, at any time, and provides broad configuration and integration capabilities.

What's new in GP 2016 R2 and soon to be released GP 2018

This session will be beneficial to learn about new features that have been added to GP 2016 R2 and the soon to be released GP 2018. Many of these new features have been recommended by end-users, so it's nice to see that they have been included in the new releases.