

HEALTHCARE SUMMIT

Program guide



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Dear attendees:

We're thrilled to welcome you to Nashville, Tennessee, for the 13th annual Crowe Healthcare Summit, a premier educational and networking event for healthcare leaders.

Along with the intensive focus on industry trends in areas including finance, reimbursement, risk, business growth, and technology, we hope you will join us for some fun at several networking events. You will have numerous opportunities throughout the week to learn from, share ideas with, and get to know your peers from hospitals and health systems across the United States. And don't forget to check out this year's Innovation Hub, which will feature an exclusive, interactive look at Crowe RCA Next, the next evolution of net revenue reporting. We'll also share more about the recent news of TPG and Crowe LLP establishing Crowe Healthcare Consulting as an independent company, Kodiak Solutions.

In this guide, you will find highlights of our programming for your Healthcare Summit experience. For more detailed information on educational sessions, presenters, and other special events, we encourage you to download the Crowe Events app. Learn more on page 10.

If you have any questions or need assistance, please look for Crowe event staff members (indicated by their white lanyards). They are here to help make your Summit experience productive and enjoyable.

We hope you enjoy all this incredible week has to offer and that you leave Summit inspired to lead your teams with confidence – no matter what this dynamic industry throws our way. Whether you're a first-timer or a returning attendee, we are so glad you have joined us.

Sincerely,

Derek Bang
Managing Partner,
Crowe Healthcare Consulting
Future CEO, Kodiak Solutions

Dan Gautschi
Principal,
Crowe Healthcare Consulting
Future COO, Kodiak Solutions

INFORMATION

Registration

Registration will take place at the Renaissance Nashville Hotel in the Event Hub on Meeting Space Level 1.

Registration/concierge desk hours*:

Sunday, Sept. 17, 5:30-7:30 p.m.

Monday, Sept. 18, 7 a.m.-3 p.m.

Tuesday, Sept. 19, 7 a.m.-3 p.m.

Wednesday, Sept. 20, 7 a.m.-3 p.m.

Thursday, Sept. 21, 8-10 a.m.

* Nashville is in the Central time zone.

Location and lodging

Renaissance Nashville Hotel
611 Commerce St.
Nashville, TN 37203
+1 615 255 8400

If you plan to drive, please note that valet parking at the hotel is available, as is a convenient self-parking option at the library garage, located across the street from the hotel. This garage is unaffiliated with the hotel property and the Crowe Healthcare Summit, and self-parking is not included in registration fees.

We hope you make the most of your time in the Music City. Visit visitmusiccity.com for more information about entertainment and dining options around Nashville.

CPE credit

New this year, CPE attendance monitoring will be conducted using the Crowe Events app. To participate, you will need to have your mobile phone fully charged and with you throughout the day to access the Crowe Events app at each session you attend. Session instructors will provide in-app polls at various times throughout the training.

In order to earn credit for a session, you will open the app and select the “CPE/Polls” icon. Then you will submit the correct response as displayed for the session you are attending. CPE will not be granted for those who do not submit the correct poll response in the Crowe Events app.

Evaluations

Please note specific sessions may have evaluations, but shortly after the Crowe Healthcare Summit, all attendees will receive an electronic evaluation about the overall experience. Your participation will help us continue to improve Summit to meet your evolving needs.

Innovation Hub

While attending the Crowe Healthcare Summit, you will have the opportunity to experience an immersive collaboration space designed for exploration of new products, solutions, and ideas. The highly interactive Crowe Healthcare Summit Innovation Lab will showcase technology-centric and innovative approaches to addressing some of our clients' most pressing challenges. The space will also feature a focus on mental and physical well-being, including a Zen Zone and mindfulness-related takeaways.



Health and safety

The safety of our attendees, exhibitors, sponsors, and event staff is a top priority. We encourage all in-person Summit attendees to monitor their daily health and to refrain from participating in events if they feel unwell or are exhibiting symptoms of illness. Attendees can find the latest health and safety information, along with complimentary safety and testing supplies, at the concierge desk in the Event Hub on Meeting Space Level 1.

Corporate responsibility

At Crowe, our corporate responsibility practices are rooted in deep values and a consistent commitment to our people, our clients, and our communities. Some of the corporate responsibility pillars in action at Summit this year include strengthening our communities through our philanthropic efforts.

Environmental stewardship

We are establishing environmentally conscientious practices and decision-making in every element of our business to minimize negative environmental impact. Leading up to and during our event, the Crowe Healthcare Summit team is committed to the efficient use of resources, such as increased recycling efforts. We also are moving more of our Summit-related materials to a digital-only format.

Strong communities

We believe in supporting causes our employees care about and strengthening the communities in which we do business. We cultivate volunteerism by making it part of the Crowe experience. At Summit, we encourage attendees to get involved in numerous philanthropic activities to support the local Nashville community. Learn more about these events on page 29. Find out more about Crowe corporate responsibility practices at crowe.com/about-us/corporate-responsibility.

Event app and social media



The Crowe Events app is available at no charge from your app store. This app is your main hub during Summit, where you can view your sessions, learn more about presenters and sponsors, take part in session polls, and more. Check the Crowe Events app often for updates to your schedule or other events and be sure to turn on push notifications.

App login: your registration email

Password: your registered last name

For your convenience, our event app help desk will be open during registration hours at the registration desk in the Event Hub on Meeting Space Level 1.

The Crowe Events app is your source for information about the Crowe Healthcare Summit in Nashville. If you are attending any virtual post-Summit sessions on Sept. 21, please visit the Healthcare Summit virtual lobby to launch those sessions:

Username: your registration email

Password: your registered last name

Please follow **@Crowe** on LinkedIn and **@CroweUSA** on X, formerly known as Twitter, to stay updated during the event, and use **#HCSummit** and **#CroweHC** to live-tweet while in attendance.

Wi-Fi

The Crowe Healthcare Summit provides complimentary wireless internet in guest rooms, at the lobby level, and in conference rooms.

To access the Wi-Fi in the conference space use:

Network: HCSummit23

Password (case sensitive): HCSummit23

To access Wi-Fi in your guest room or lobby level use:

Network: Renaissance_Guest

Password: HCSummit23

Note: You will *not* be charged.



Electronic recording and photography policy

Portions of the Crowe Healthcare Summit may be electronically recorded by Crowe. By registering, you agree to permit audio, video, and photographic recording of your participation in Summit sessions, and you authorize Crowe to use any audio, video, and photographic recordings of you at Summit in any format and for any lawful purpose, such as editorial content, publicity, illustrations, advertising, and web content. You hereby waive your right to inspect and/or approve any finished product. No individual or entity may electronically record any portion of the Crowe Healthcare Summit without the prior written consent of Crowe.

Sponsors

We're happy to announce sponsor support for this year's Healthcare Summit.

Gold sponsor



Collaborative Data Inc. is a Michigan-based healthcare consulting firm specializing in data-based patient accounting and reimbursement solutions for hospitals nationwide. They offer a best-in-class, completely automated, and comprehensive Medicare bad debt solution to assist providers with their annual Medicare cost report filing.

Silver sponsors



Capio helps healthcare providers and physician organizations increase cash flow while lowering their bad debt expense and delivering compassionate, flexible resolution solutions to patients burdened by medical debt. Capio is an advocate for patient-centered collections and offers tools to help patients pay what they can afford and achieve long-term financial wellness.



Knowtion Health helps health systems resolve COB and clinical denials, recover low balance accounts, and resolve complex claims. We help hospitals win the claims game by resolving insurance claims and low balance accounts, accelerating and increasing revenue, solving the labor crisis, and optimizing the patient experience. Our technologies and claim experts arm providers with innovative ideas, meaningful feedback and reimbursement trends driving better automation and outcome in insurance claim resolution and the often-neglected low balance A/R inventories that can reduce bad debt impactfully.



SparkChange is solving revenue cycle challenges by working with our clients to find the optimal human and machine collaboration level. Through analytics that identify disruptions from presentation to payment, automated actions that reduce both labor required and complexity of getting paid, and a rich set of services that help clients get the most from their systems, SparkChange is producing better financial outcomes in health systems across the United States.



UASI has a 40-year track record of delivering outcomes in revenue cycle through operational excellence. We help health systems address resource gaps, improve reimbursement accuracy and quality, ensure adherence to compliance standards, and optimize performance of risk-based patient populations. Our consulting, outsourcing, and risk adjustment offerings are customized to the needs of our healthcare provider clients. What challenges can we help you overcome?



Wellness sponsors



Firstsource Solutions Limited, an RP-Sanjiv Goenka Group company (NSE: FSL, BSE: 532809, Reuters: FISO.BO, Bloomberg: FSOL:IN), is a leading provider of transformational solutions and services spanning the customer lifecycle across healthcare, banking and financial services, communications, media and technology, and other industries. The company's 'digital first, digital now' approach helps organizations reinvent operations and reimagine business models, enabling them to deliver moments that matter, and build competitive advantage. With an established presence in the US, the UK, India, and the Philippines, Firstsource acts as a trusted growth partner for over 100 leading global brands, including several Fortune 500 and FTSE 100 companies.



With more than 50 years of experience, Hall Render is dedicated to advancing the vision of our clients across the country through our collaborative, solutions-oriented approach to client matters. Because the scope of our clients' needs can encompass multiple niche areas of health law, our attorneys often collaborate to share their diverse insights, providing our clients with comprehensive, contemporary legal advice and business consultation. While we continue to adapt our services and structure to accommodate current trends and changes within the health care industry, our firm has never wavered from the tradition of excellence on which it was founded. Client service is the cornerstone of Hall Render, and with more than 150 attorneys throughout the country singularly focused on serving the health care industry, there isn't a health care issue we haven't solved.

Community collaborators



Tennessee Alliance for Kids (TAK) engages the community to meet the emergent and ongoing needs of children in foster care, those at risk of coming into foster care, and those aging out.



Pinksocks Life, Inc. is a tax exempt 501(c)(3) charitable organization focused on promoting human connection around the world. The pinksocks movement empowers people from all walks of life to connect with anyone, anywhere, by creating a global tribe of pinksocks-wearing people who are focused on kindness, empathy, connection, and love. The movement has been decommoditized from its beginning in 2015 – all pinksocks are gifts. Every connection made between the gift giver and recipient is based on an authentic connection, not a transaction.



SweetAbility bakery's mission is for people with disabilities to have fun, create, and be empowered. We offer everything from cookies to cakes, pies, and more. We use the highest quality ingredients and add some love to each item we bake.

Special thanks to our event collaborators



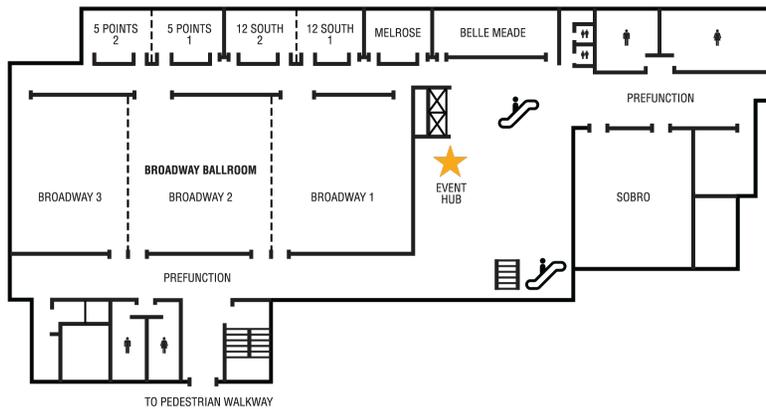
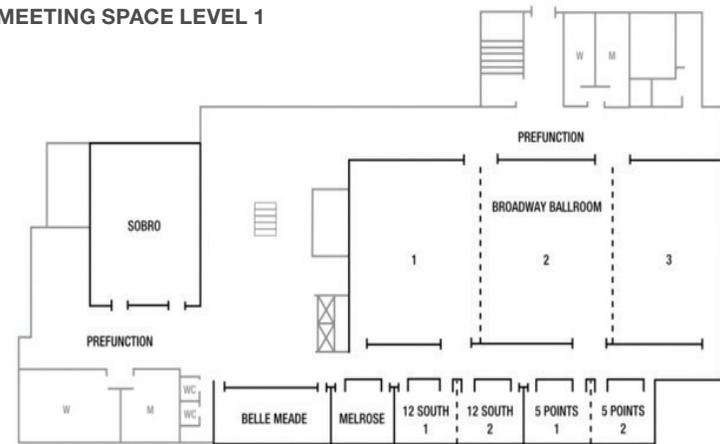


Renaissance Nashville floors

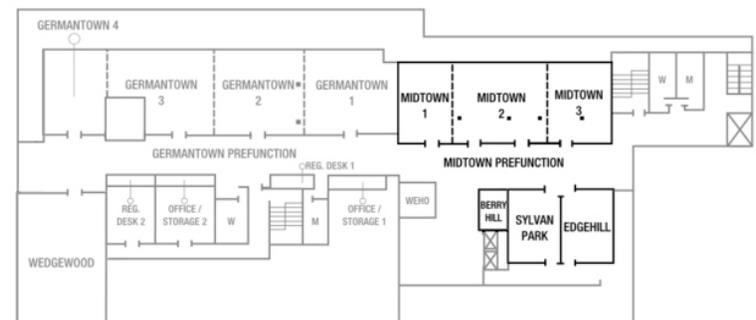
Room locations and maps

The maps on the following pages provide details about the Renaissance Nashville Hotel conference space designated for the Crowe Healthcare Summit.

MEETING SPACE LEVEL 1



MEETING SPACE LEVEL 2



SCHEDULE

All times listed are in the Central time zone.

Sunday, Sept. 17

5:30-7:30 p.m. **Registration reception hour** // Event Hub, Meeting Space Level 1
• See page 27 for details.

Monday, Sept. 18

7 a.m.-3 p.m. **Healthcare Summit registration and concierge** // Event Hub, Meeting Space Level 1

7-8 a.m. **Breakfast** // Midtown 1,2,3, Meeting Space Level 2

8 a.m.-noon **Workshop: Crowe RCA: Creating information and insight out of data** // Edgehill
4.0 CPE credit hours • Sara Hoshaw, Peter O'Neill, and Greg Schroeder, Crowe

Workshop: Crowe RCA: Understanding MRA results // Sobro
4.0 CPE credit hours • Camryn Buhr, Marko Guzina, Jen Heck, and Cailynn Holm, Crowe

10-10:30 a.m. **Break** // Broadway Foyer, Meeting Space Level 1

Noon-1 p.m. **Lunch** // Midtown 1,2,3, Meeting Space Level 2

1-3 p.m. **Workshop: Crowe RCA: Innovative approaches to reserve modeling** // Edgehill
2.0 CPE credit hours • Marko Guzina and Abby Susko, Crowe

Workshop: Crowe RCA: Analyzing change in prior-period estimates // Sylvan Park
2.0 CPE credit hours • Brett Butts and Connor Barclay, Crowe

1-5 p.m. **Workshop: Crowe RCA: Understanding VA results** // Sobro
4.0 CPE credit hours • Tony Dodaro, Sara Hoshaw, Jenna Kleinrichert, and Joe Ravotto, Crowe

Payor scorecard design sprint – session 1 (invitation only) // Gospel, Hotel Level 4
Colleen Hall and Preston Kelly, Crowe

3-3:30 p.m. **Break** // Broadway Foyer, Meeting Space Level 1

3:30-5:30 p.m. **Workshop: Crowe RCA: Ad hoc reporting module and Tableau – intermediate** // Edgehill
2.0 CPE credit hours • Thor Peterson and Allie Kleimola, Crowe

Workshop: Net revenue: Developing a meaningful narrative using the custom net revenue package from Crowe // Sylvan Park
2.0 CPE credit hours • Ryan Herr and Abby Susko, Crowe

6-9 p.m. **Networking and social event: Wildhorse Saloon**
See page 27 for details.

Tuesday, Sept. 19

7 a.m.-3 p.m.	Healthcare Summit registration and concierge // Event Hub, Meeting Space Level 1
7-8 a.m.	Breakfast // Midtown 1,2,3, Meeting Space Level 2
8-9 a.m.	Attendee favorite! Breakout session: Hot topics in government reimbursement // Broadway 3 1.0 CPE credit hour • Amy Duncan, Collaborative Data Inc.; Liz Elias, Hall Render, Killian, Heath & Lyman P.C.; and Nick West, Crowe Breakout session: Net revenue through the looking glass: Planning, budgeting, and forecasting // Edgehill 1.0 CPE credit hour • Dan Bonner and Fred Lewis, Crowe Breakout session: Understanding change in prior period adjustments // Sobro 1.0 CPE credit hour • Amber Schon, Geisinger Health; and Connor Barclay and Abby Susko, Crowe Breakout session: Your guide to navigating the M&A landscape // Sylvan Park 1.0 CPE credit hour • Adnan Qureshi, Kaufman, Hall & Associates, LLC; Rick Greene, Specialized Dental; Lynn Shapiro Snyder, Epstein Becker Green; and Todd Spaanstra, Crowe
9 a.m.-noon	Payor scorecard design sprint – session 2 (invitation only) // Gospel, Hotel Level 4 • Colleen Hall and Preston Kelly, Crowe
9:15-10:45 a.m.	Breakout session: The future unveiled: Crowe RCA Next showcase // Broadway 1,2 1.5 CPE credit hours • Lucas Coleman, Brad Heaton, Michele Losekamp, Andrew Obaseki, and Bryan Rector, Crowe
10:45-11 a.m.	Break // Broadway Foyer, Meeting Space Level 1
11 a.m.-noon	Breakout session: Worksheet S-10 reporting: What's next? // Broadway 3 1.0 CPE credit hour • Jill Fusco and Nick West, Crowe Breakout session: Completing close in Crowe RCA Next – fewer clicks, faster results // Sobro 1.0 CPE credit hour • Brad Heaton and Michele Losekamp, Crowe Breakout session: Focus group: Employer contract management and value-based contracting // Sylvan Park 0 CPE credit hours • Dr. Adrienne Moore, Banner Health; and Tracey Coyne and Eric Proctor, Crowe
Noon-1 p.m.	Lunch // Midtown 1,2,3, Meeting Space Level 2 Healthcare Women Connexxt luncheon (invitation only) // 5 Points 1, 2
1-2:15 p.m.	Keynote: Going on offense: Mapping success for the year ahead // Broadway 1,2 1.0 CPE credit hour • Dr. Adrienne Moore, Banner Health; Aaron Stapp, CommonSpirit Health; Joanne Alig, Wisconsin Hospital Association; Tim Balasia, Eskenazi Health; and Derek Bang, Megan Beasley, Eric Boggs, Sarah Cole, Dan Gautschi, Colleen Hall, and Ryan Hartman, Crowe
2:15-3 p.m.	Innovation Hub // Event Hub, Meeting Space Level 1
2:30-3 p.m.	Break // Broadway Foyer, Meeting Space Level 1



3-4 p.m.	Breakout session: An insider's guide to Medicare bad debt reporting and coming changes // Broadway 3 1.0 CPE credit hour • Amy Duncan, Collaborative Data, Inc.; and Nick West, Crowe Breakout session: Building, editing, and sharing reports in Crowe RCA Next // Sobro 1.0 CPE credit hour • Lucas Coleman and Andrew Obaseki, Crowe Breakout session: Unapplied cash – addressing unique finance, revenue cycle process, and general ledger pain points // Sylvan Park 1.0 CPE credit hour • Mendy-Sue Drew, Scripps Health; and Tracey Coyne, Ryan Herr, and Eric Proctor, Crowe
4-5 p.m.	Wellness Focus Hour: Chair Yoga/Chair Massages* // Event Hub, Meeting Space Level 1 5 Points Room 1 and 2 <i>*Sign-up and waiver required on-site.</i>
4:30-9 p.m.	Networking and social event: Grand Ole Opry Meet in Renaissance Nashville Hotel lobby. First bus to the event leaves at 4:30 p.m.; final bus leaves at 4:45 p.m. See page 28 for details.
6-9 p.m.	Networking and social event: Ole Red Rooftop This event is an approximately 10-minute walk from the Renaissance Nashville Hotel lobby; shuttle buses also will be available. Meet in hotel lobby at 5:50 p.m. See page 28 for details.

Wednesday, Sept. 20

6:30-7:30 a.m.	Wellness Movement hour – sunrise yoga 5 Points Room 1
7-10 a.m.	Wellness: Chair massages* // Event Hub, Meeting Space Level 1 5 Points Room 2 <i>*Sign-up and waiver required on-site.</i>
7 a.m.-3 p.m.	Healthcare Summit registration and concierge // Event Hub, Meeting Space Level 1
7-8 a.m.	Breakfast // Midtown 1,2,3, Meeting Space Level 2
8-9 a.m.	Breakout session: Length of stay case study: The power of Crowe RCA data // Broadway 3 1.0 CPE credit hour • Susan Searcy, UnityPoint Health; and Megan Beasley and Megan Galvan, Crowe Breakout session: Leveraging Crowe RCA data to deliver actionable net revenue insights // Sobro 1.0 CPE credit hour • Ben Hayhurst, Manager - Reimbursement; Gary Simkus and Michael Tokash, UHS; and Brett Butts and Peter O'Neill, Crowe Breakout session: Crowe Financial Control Analytics finds errors sooner to save you time and money // Sylvan Park 1.0 CPE credit hour • Sarah Cole and Andrew Perez, Crowe Payor scorecard design sprint – session 3 (invitation only) // Gospel, Hotel Level 4 Colleen Hall and Preston Kelly, Crowe
9:15-9:45 a.m.	Innovation roundtable: Navigating the distributed workforce era // 5 Points 1 Eric Boggs, Crowe
9:45-10:30 a.m.	Innovation Hub // Event Hub, Meeting Space Level 1
10-10:30 a.m.	Break // Broadway Foyer, Meeting Space Level 1
10:30 a.m.-noon	Keynote: Developing and sustaining high performance in turbulent times // Broadway 1,2 1.5 CPE credit hours • Dr. Wendy Borlabi, Chicago Bulls; and Melissa Dill and Colleen Hall, Crowe
Noon-1 p.m.	Lunch // Midtown 1,2,3, Meeting Space Level 2 Off the court: A deep dive to your A-game (invitation only) // 5 Points 1, 2 Wendy Borlabi, Chicago Bulls

1-2 p.m.	Breakout session: Crowe RCA for physicians: Challenges and best practices // Broadway 3 1.0 CPE credit hour • Tom Alwine and Eric Busch, Crowe Breakout session: Peer insights into Crowe RCA month-end close process // Sobro 1.0 CPE credit hour • Susan Fisher, PeaceHealth; Jennie Rhoads, Geisinger Health; and Ryan Herr and Abby Susko, Crowe Breakout session: Are you ready? Preparing for your Crowe RCA Next conversion // Edgehill 1.0 CPE credit hour • Derek Ellis, Jenna Haworth, Brad Heaton, and Jenna Kleinrichert, Crowe Breakout session: Crowe RCA best practices for AR account resolution with machine learning (credit and debit balances) // Sylvan Park 1.0 CPE credit hour • Alex Boone, Ryan Hartman, and Chad Oakley, Crowe
2-2:30 p.m.	Break // Broadway Foyer, Meeting Space Level 1
2:30-4 p.m.	Keynote: The power of the CFO team: A modern-day playbook // Broadway 1,2 1.5 CPE credit hours • Rick Carrico, Baptist Health; Cecelia Moore, Vanderbilt University Medical Center; James Porter, ThedaCare; and Dan Gautschi, Colleen Hall, and Dan Yunker, Crowe
4:15-5:15 p.m.	Breakout session: Net revenue reporting ideation (key reporting metrics) // Broadway 3 1.0 CPE credit hour • Tom Alwine and Brett Butts, Crowe Breakout session: Executive roundtable: Strategic leadership – building the 2024 playbook // Sobro 0 CPE credit hours • Rick Carrico, Baptist Health; Cecelia Moore, Vanderbilt University Medical Center; James Porter, ThedaCare; and Dan Yunker, Crowe Breakout session: Questions and answers: New Crowe RCA Next features // Sylvan Park 0 CPE credit hours • Derek Ellis, Brad Heaton, and Bryan Rector, Crowe
5:30-7:30 p.m.	Networking and social event: Farewell reception // Event Hub, Meeting Space Level 1 See page 28 for details.



Thursday, Sept. 21

(post-Healthcare Summit encore sessions)

Note: Events on Thursday are virtual only. Please log in via the Summit virtual lobby at the scheduled times to attend these sessions.

8-10 a.m.	Healthcare Summit registration and concierge // Event Hub, Meeting Space Level 1
10-11 a.m.	Breakout session: Net revenue through the looking glass: Planning, budgeting, and forecasting 1.0 CPE credit hour • Dan Bonner and Fred Lewis, Crowe
	Breakout session: Are you ready? Preparing for your Crowe RCA conversion 1.0 CPE credit hour • Derek Ellis, Jenna Haworth, Brad Heaton, and Jenna Kleinrichert, Crowe
	Breakout session: Crowe RCA best practices for AR account resolution with machine learning (credit and debit balances) 1.0 CPE credit hour • Alex Boone, Ryan Hartman, and Chad Oakley, Crowe
11:15 a.m.-12:15 p.m.	Breakout session: Crowe Financial Control Analytics finds errors sooner to save you time and money 1.0 CPE credit hour • Sarah Cole and Andrew Perez, Crowe
	Breakout session: Leveraging Crowe RCA Data to deliver actionable net revenue insights 1.0 CPE credit hour • Ben Hayhurst, Manager - Reimbursement; Gary Simkus and Michael Tokash, UHS; and Brett Butts and Peter O'Neill, Crowe
	Breakout session: Length of stay case study: The power of Crowe RCA data 1.0 CPE credit hour • Susan Searcy, UnityPoint Health; and Megan Beasley and Megan Galvan, Crowe



JOIN US

Networking and social events

Sunday, Sept. 17

Registration reception hour 5:30-7:30 p.m. | Event Hub, Meeting Space Level 1

Stop by registration located in the Event Hub on Meeting Space Level 1 at the Renaissance Nashville Hotel. Check in, grab a drink, and stay for a quick bite to eat.

Monday, Sept. 18

Wildhorse Saloon 6-9 p.m.

Put on your boots and step out for line dancing at the Wildhorse Saloon, led by the Mustang Dancers. This event will be an approximately 10-minute walk from the Healthcare Summit venue – or a quick shuttle ride for those who require transportation. Meet in the Renaissance Nashville Hotel lobby at 5:40 p.m. The evening also will include a delicious buffet of assorted Southern-style cuisine and a philanthropic activity supporting the Tennessee Alliance for Kids.



Tuesday, Sept. 19

Grand Ole Opry 4:30-9 p.m.

Join us for a live music showcase at the world-famous Grand Ole Opry. Two buses will depart the Renaissance Nashville Hotel lobby at 4:30 p.m. and 4:45 p.m., respectively, for the half-hour drive to the Opry theater. This event will include a Southwestern-style meal on the portico overlooking Opry Plaza followed by the Grand Ole Opry show. Estimated return to the hotel will be 9:30 p.m. Please note this event required prior sign-up.

Ole Red Rooftop 6-9 p.m.

At the Lookout at Ole Red, take in the sights and live music while overlooking Broadway as you enjoy a Southwestern-style meal. This event will be an approximately 10-minute walk from the Healthcare Summit venue; shuttle buses also will be available for those who prefer that option. Meet in hotel lobby at 5:50 p.m.

Wednesday, Sept. 20

Farewell reception 5:30-7:30 p.m. | Event Hub, Meeting Space Level 1

Connect with other industry leaders and share your Healthcare Summit takeaways at our farewell reception hosted in the Event Hub on Meeting Space Level 1 at the Renaissance Nashville Hotel.

Health and wellness activities

Take some time to reenergize your mind and body during these wellness-centered events.

Zen Zone: Located under the stairs in the Event Hub, Meeting Space Level 1, for the entirety of the event with comfortable seating options, tranquil lighting, and aromatherapy.

Tuesday, Sept. 19

Wellness focus hour: Chair yoga/chair massages*

4-5 p.m. 5 Points Room 1 and 2, Event Hub, Meeting Space Level 1
**Sign-up and waiver required on-site.*

Wednesday, Sept. 20

Movement hour – sunrise yoga

6:30-7:30 a.m. 5 Points Room 1, Event Hub, Meeting Space Level 1

Wellness: Chair massages*

7-10 a.m. 5 Points Room 2, Event Hub, Meeting Space Level 1
**Sign-up and waiver required on-site.*

Philanthropic activities

We welcome your participation in the following opportunities to support the local Nashville community and beyond during your time at Summit. On Monday night at the Wildhorse Saloon, join us for a hands-on activity to benefit the **Tennessee Alliance for Kids (TAK)**. Get to know other Summit attendees as you put together TAK PAKS – backpacks filled with hygiene and personal products and handwritten notes for children in foster care.

Be sure to visit the Healthcare Women Connexxt/Pinksocks booth to learn more about **Pinksocks Life**. Meet Healthcare Women Connexxt founder Colleen Hall, from Crowe, and Nick Adkins, co-founder of Pinksocks Life. We also look forward to welcoming attendees to the Healthcare Women Connexxt luncheon on Tuesday, Sept. 19 (invitation only). Crowe Healthcare Summit/Healthcare Women Connexxt is proud to donate to Pinksocks Life to support Holcomb Elementary School in Oregon City, Oregon, so they can all get their “Pink Socks.”

And while you’re exploring the Crowe immersive Innovation Hub, stop by the CFO mind map booth to enjoy a sweet treat from **SweetAbility**, a bakery with a mission to empower people with disabilities. Find out more about these amazing charitable organizations on page 15.

BIOGRAPHIES

Keynote speakers

Crowe presenter biographies can be found in the Crowe Events app.



Joanne Alig

Joanne Alig is responsible for leading the development of public policy in the areas of Medicaid and commercial insurance, healthcare coverage, overall hospital reimbursement, transparency, and other regulatory matters affecting hospitals and health systems. Joanne brings a unique perspective to healthcare issues with her experience working for the state, payors, and providers.

Tim Balasia

Tim Balasia is responsible for leading all phases of the financial cycle, including financial reporting, accounts payable, payroll, auditing, federal and state grant compliance, and revenue cycle support services as the corporate controller for Eskenazi Health. With more than 20 years of experience, Tim has had success leading audits, budgeting and forecasting, physician practices, revenue cycle, compliance, cost reporting, strategic planning, and with implementing information technology solutions aligned with best financial acumen. Tim earned his MBA and finance degree from Purdue University.



Dr. Wendy Borlabi

Dr. Borlabi is widely respected as an innovator whose data-backed, mindset-based approach to success inspires high performance in teams and helps individuals unlock their full potential. As director of performance and mental health for the Chicago Bulls, she shapes the mental aspects of elite athletes' games to prepare them for success on the court. She also serves as an independent consultant for the NBA and is the founder of performance psychology firm Borlabi Consulting. Dr. Borlabi was previously a senior sports psychologist for the United States Olympic Committee, preparing America's top athletes for dominant performances at two winter Olympics and one summer Olympics. Before that, she was a senior athletic consultant at James Madison University and spearheaded the development of its sport psychology department. Dr. Borlabi has shared her insights on high performance in top publications, including ESPN, CBS Sports, CNN, and the Chicago Sun-Times. She's a sought-after expert who adapts high performance strategies from the world of sports to help organizations operate at a championship level.



Rick Carrico

Rick Carrico is CFO of Baptist Health, overseeing finance, financial strategy and integration, revenue cycle management, information technology, analytics, and business intelligence for the Louisville, Kentucky-based system. Rick has nearly 40 years of healthcare-related experience. He most recently served as executive vice president and CFO for WakeMed Health and Hospitals in Raleigh, North Carolina. Prior to joining WakeMed, Rick was vice president and CFO of Greater Hudson Valley Health System in Middletown, New York. Prior to that, he was executive vice president and CFO of Springstone LLC in Louisville and associate CFO at Norton Healthcare. He joined Norton after 15 years of increasing responsibility at Kindred Healthcare, where he rose to vice president of internal audit. Rick began his healthcare career in the internal audit department at Humana, followed by a stint in Florida with Basic American Medical at its flagship hospital in Fort Myers. He is a CPA and has a bachelor's degree in accounting from Bellarmine University and a Master of Business Administration degree from the Mendoza College of Business at the University of Notre Dame.



Dr. Adrienne Moore

Dr. Adrienne Moore serves in an executive leadership role for many front and middle revenue cycle areas. She also leads strategy and execution for several large-scale revenue cycle transformation projects. Previously, Adrienne held roles with Adventist Health West, HonorHealth, and Banner Health, giving her experience in most areas of healthcare finance, strategic planning, and revenue cycle. She holds a doctorate in public health from Loma Linda University (California) and degrees in healthcare management, finance, and accounting.



Cecelia Moore

Cecelia Moore is CFO and treasurer of Vanderbilt University Medical Center, a role she has held since 2013. She directs financial operations for the \$4.8 billion medical center, which includes five hospitals, a faculty practice plan, the Vanderbilt Medical Group, a large academic research enterprise, and clinical joint ventures. In 2016, she led the financial transition of VUMC to a separate 501(c)(3) organization, distinct from Vanderbilt University. This separation included the issuance of more than \$1.2 billion in debt. Prior to her appointment at Vanderbilt, Cecelia worked in a variety of roles at Duke University Health System and its faculty practice plan, the Private Diagnostic Clinic. Prior to her work at Duke, Cecelia consulted with numerous hospitals in chargemaster optimization and coding and worked in physician practice and receivables management. She earned her bachelor's degree with honors from Duke University and a master's degree in health administration from Duke's Fuqua School of Business. She is a CPA in North Carolina and a Certified Healthcare Financial Professional through the Healthcare Financial Management Association.



Jim Porter

Jim Porter is responsible for leading the finance, treasury and supply chain functions for ThedaCare, Inc., a \$1 billion integrated health system with seven hospitals and over 35 ambulatory and physician practices in northeast Wisconsin. Jim is an accomplished healthcare revenue cycle executive leader and chief financial officer, known for excellence in revenue cycle, strategy, planning, balance sheet management, physician relations, finance, forecasting, patient engagement, budgeting, and reimbursement. He is an innovative problem-solver with a proven ability to streamline operations, maximizing quality, efficiency and financial performance. Prior to joining ThedaCare, Jim was CFO of Humboldt Park Health, a safety-net hospital in Chicago. Jim earned his bachelor of arts from Augustana College, and is a fellow in the Healthcare Financial Management Association.



Aaron Stapp

Aaron Stapp is a system vice president in revenue cycle for CommonSpirit Health. He leads analytics, finance, and innovation for revenue cycle and has been with CommonSpirit Health since the organization was created from the merger between Catholic Health Initiatives and Dignity Health. Aaron has over 20 years of healthcare finance experience with more than 15 years focused on revenue management and has held leadership positions with Catholic Health Initiatives, SCL Health, Exempla Healthcare, and Florida Hospital.



Guest speakers



Mendy-Sue Drew

Mendy-Sue Drew is responsible for leading all accounting, tax, and payroll functions for Scripps Health, an integrated healthcare delivery system in San Diego. Mendy-Sue has spent her career at Scripps Health in the corporate finance team, most currently as the assistant vice president of accounting and payroll, working to improve operations and processes within the corporate finance functions and consolidated entities. Prior to joining Scripps Health, Mendy-Sue has had experience in finance operations of a large nonprofit and gained internal and external audit experience in nonprofits, hospitals, and banks. Mendy-Sue earned her bachelor's degree in public accounting from Husson College in Bangor, Maine. She earned her CPA license and is a fellow of the Healthcare Financial Management Association. She has also earned her certified net revenue analyst certification.



Amy Duncan

Amy Duncan is the president of Collaborative Data Inc., located in Clarkston, Michigan. Amy has more than 20 years of reimbursement experience and specializes in Medicare bad debt reporting.



Liz Elias

Liz Elias is a shareholder and the managing partner of Hall Render's Indianapolis office. She assists providers with Medicare and Medicaid administrative appeals, assists with strategy for federal court litigation, and provides reimbursement compliance guidance for providers ranging from major healthcare systems to solo practitioners. Liz earned her undergraduate degree at Purdue University and her law degree at Indiana University McKinney School of Law, but she will always be a Boilermaker first and foremost.



Susan Fisher

Susan Fisher is responsible for revenue cycle analytics support and reserve posting for PeaceHealth's 10 acute care medical centers. PeaceHealth serves communities across Washington, Oregon, and Alaska through its medical centers, home health and hospice, and 800-plus provider medical groups. Susan has worked in healthcare for more than half a decade in universities, community, and nonprofit medical centers in various

clinical care areas as a senior analyst in finance, reimbursement, contract management, and revenue cycle and as a project manager. Susan's project management experience includes working on a multihospital revenue cycle initiative and serving as team lead on a national benchmarking data build, as a project manager on a physician electronic medical record implementation, and as lead on a patient perioperative and trauma center tracking board with a community trauma alert system. Susan earned her Bachelor of Arts degree in economics and finance at the University of Arizona.



Rick Greene

During the past 35 years, Rick Greene has worked in public and private companies as well as national and regional consulting firms. He recently joined Specialized Dental Partners, based in Franklin, Tennessee, where he serves as CFO. Specialized Dental is the parent company of US Endo Partners, the nation's first and largest endodontic dental service organization, and Specialized Dental Partners. Specialized Dental currently manages approximately 135 practices in 34 states. Prior to Specialized Dental, Rick served for five years as CFO of Epiphany Dermatology, based in Austin, Texas. During that time, Epiphany completed more than 30 acquisitions and grew from 20 locations in five states to 78 locations in 13 states with annual revenue growing more than 10 times from approximately \$20 million to more than \$200 million. Rick also led Epiphany through a successful sale to Leonard Green & Partners in January 2022. Rick is a CPA and holds a Bachelor of Science degree from Carson-Newman University, where he serves on its board of trustees. He also serves on the board of directors for HCW Biologics Inc.



Ben Hayhurst

Ben Hayhurst is a father, continuous learner, simplifier of complex data, political and economic junkie, outdoor enthusiast, and a stubbornly idealistic friend.





Adnan Qureshi

Adnan Qureshi is a senior vice president with the Partnerships, Mergers, and Acquisitions practice at Kaufman Hall. He provides merger, acquisition, joint venture, and other strategic advisory services for healthcare clients. He also serves on Kaufman Hall's Diversity, Equity, and Inclusion Steering Committee. Mr. Qureshi has nearly 15 years of healthcare transaction experience spanning across M&A advisory and corporate development roles. Prior to joining Kaufman Hall, he was a director of development at Surgical Care Affiliates, a subsidiary of Optum/UnitedHealth Group. In that role, Mr. Qureshi led market entry strategy in several geographies and sourced, structured, and executed ambulatory surgery center acquisitions and partnerships with health systems and risk-bearing care delivery organizations. He previously served as an associate in the Healthcare M&A Group at Houlihan Lokey and as a manager of strategic development at DaVita. Mr. Qureshi holds a dual Bachelor of Science degree in finance and accountancy from the Gies College of Business at the University of Illinois at Urbana-Champaign.



Jennie Rhoads

Jennie Rhoads is the manager of Geisinger Health's revenue recognition team. In this role, she is responsible for leading the valuation of patient receivables and related analytics for five facilities. Prior to Geisinger, Jennie spent four years as an internal auditor for a manufacturing company, CSS Industries, and four-and-a-half years as an external auditor for KPMG. Jennie has three kids: 7-year-old twins, Elijah and Aubrey, and 3-year-old Cora.



Amber Schon

Amber Schon is the director of Geisinger Health's revenue recognition team. She is responsible for leading the valuation of patient receivables and related analytics for eight facilities, two medical groups, one surgical center, one pharmacy entity, and one emergency medical services entity. Prior to Geisinger, Amber spent 5 1/2 years as a legislative auditor for the state of Maryland. Amber is a CPA, a certified healthcare finance professional, a certified fraud examiner, and an avid violist.



Susan Searcy

Susan Searcy is executive director, revenue integrity, at UnityPoint Health. In her role, she has responsibility for revenue cycle analytics and reporting for the hospital and physician services, chargemaster maintenance, price transparency reporting, revenue cycle training, and service line revenue cycle leadership. She also serves as the CFO liaison for revenue cycle shared services at UnityPoint. Susan has more than 30 years of healthcare finance and revenue cycle experience. She has been an active Healthcare Financial Management Association member, holding leadership and committee roles at the state and national levels.



Gary Simkus

Gary Simkus is vice president, financial analytics and system, for the Acute Division at Universal Health Services Inc. He has been with the organization since 2017. Gary brings more than 15 years of financial management experience and expertise to his current role, with 13 of those in the acute care setting. Gary was recognized as a 2017 fellow of LEADERSHIP Philadelphia and nominated for the Philadelphia Business Journal's 2015 "40 Under 40" awards. He holds a green belt in Lean Six Sigma and his black belt certificate is pending final project review. He has received his designation as a certified net revenue analyst. For the past four years, Gary has been leading a centralized team of four director/managers who manage the Crowe RCA tool across 26 UHS acute care facilities in addition to training CFOs and controllers at those sites. This year the team will be implementing physician billing on Crowe RCA for more than 400 physicians. Additionally, he leads a team of 15 director/managers who oversee contract modeling, cost accounting, financial systems, and analytics.



Lynn Shapiro Snyder

Lynn Shapiro Snyder is a senior healthcare regulatory lawyer and strategic adviser for healthcare and life sciences companies. She has more than 45 years of experience at Epstein Becker Green, navigating clients through healthcare regulatory, reimbursement, billing, health policy challenges, healthcare mergers and acquisitions, and healthcare fraud enforcement, including anti-kickback and false claims investigations. As one of the earliest healthcare lawyers—and one of the first women in the field—Lynn has guided the strategic growth of leaders and innovators in the healthcare industry. She most recently has been advising clients on the appropriate and compliant creation and use of artificial intelligence tools in the healthcare and life sciences industries. Lynn's long-lived commitment to healthcare clients started with working in her family's retail pharmacy/home medical equipment business and extends today to service on several boards of directors. A champion of inclusion, Lynn also founded the Women Business Leaders of the U.S. Health Care Industry Foundation.



Michael Tokash

Michael Tokash serves as director of net revenue management for Universal Health Services Inc. He has been with the organization for more than five years. With an extensive background exceeding 20 years in healthcare financial management, Michael contributes a wealth of experience to his ongoing responsibilities. Functioning as a forward-looking leader, he provides direction across the spectrum of financial operations. His analytical leadership centers on his approach of optimizing results through collaborative cross-functional efforts.

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