



## Essentials for Utilization Review

### DATE and Time

Wednesday, July 12, 2023  
8:00 a.m. - 4:00 p.m.

### LOCATION

LHA Conference Center  
2334 Weymouth Drive  
Baton Rouge, LA 70809

### WHO SHOULD ATTEND

Case managers, utilization review specialist, directors and managers who oversee case management programs, and anyone who wishes to have a better understanding of the case management role and program

### CONTINUING EDUCATION

**Nursing:** 6.75 contact hours will be awarded for this offering by the LHA for complete attendance and evaluation of the program. The LHA is approved by the Louisiana State Board of Nursing – CE Provider #39.



**Case Management:** This program has been approved by the Commission for Case Managers Certification (CCMC) to provide board certified case managers with 6.75 clock hours, upon complete attendance and evaluation of this program.

**Other Participants** will receive, upon completion of this workshop and evaluation, a certificate documenting the completed continuing education/clock hours.

### [EDUCATION CALENDAR](#)

### [HOTEL WITH LHA GROUP RATE](#)

### OVERVIEW:

This is a comprehensive foundational presentation on the history of utilization review (UR) and the basics of how to excel in your role as a UR Specialist. The course will ensure a clear understanding of Medicare guidelines and the expectations of the UR Committee according to the Conditions of Participation (CoP). The course will expand and dive into a forward-thinking process on how to optimize daily workflows and manage the ever-changing payer requirements. The lesson will be a blend of lecture and case scenarios with group discussion regarding the medical necessity of patient admissions, concurrent reviews, and what to do when the denial occurs from the payer. The course content is modeled after best practices, from the 3rd edition of *The Hospital Guide to Contemporary Utilization Review* (2021)

### PROGRAM OBJECTIVES:

Upon completion of this program, participants will be able to:

- Explain the four parts of Medicare and coverage by each entity that affects patient care, placement, and copays;
- Enhance knowledge of required advance Medicare notices and the optimal time to deliver these to patients during their stay; and
- Describe three techniques used to improve communications and relationships with team members to create a successful UR process.

### AGENDA

7:30 a.m.	Registration
8:00 a.m.	Introductions and Overview of Session
8:30 a.m.	History of UR with CoP Centers for Medicare & Medicaid Services (CMS) Regulations and Payer Requirements
10:00 a.m.	Break
10:15 a.m.	Understanding the UR Process and the Role of a UR Specialist; Discussion of Medicare Advantage (MA) Final Rule and 2024 Inpatient Prospective Payment System (IPPS)
11:15 a.m.	Case Reviews and Small Group Activity
12:15 p.m.	Lunch (Provided)
1:00 p.m.	Review Required CMS Notices
2:30 p.m.	Case Reviews and Small Group Activity
3:15 p.m.	Break
3:30 p.m.	Examining Advance UR Practices
4:00 p.m.	Adjourn

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### MEET YOUR FACULTY:

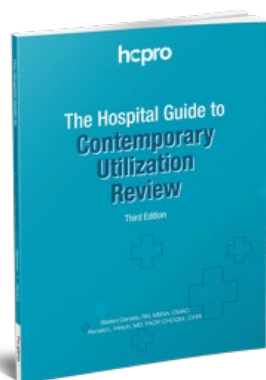
**Tiffany Ferguson** is the CEO of Phoenix Medical Management, Inc., serves as an adjunct professor at Northern Arizona University Department of Social Work, and serves on the American College of Physician Advisors (ACPA) Observation Subcommittee. She is a regular contributor to RACmonitor and Case Management Monthly; serves on the editorial board for CMSA Today; is a commentator for Finally Friday; and is a weekly correspondent on SDoH for the news podcast, Monitor Monday. After practicing as a hospital social worker, she went on to serve as Director of Case Management and quickly assumed responsibilities in system-level leadership roles in health and care management, which includes case management, utilization review, clinical documentation improvement, health information manager, and coding. She has experience with a large employed medical group, which included value-based arrangements, patient-centered medical home, and outpatient care management. Ferguson is a graduate of Northern Arizona University and received her MSW at UCLA. She is a licensed social worker, and is ACM and CMAC certified.

**Linda O'Donnell, RN, BSN, MHA, CMAC**, has more than 35 years of nursing experience and is currently the Senior Director of Operations for Care Management and Ambulatory Services at a multi-state large healthcare system. She formerly served as the Director of Care Management at a large community hospital and tertiary hospital. In the past, she served as an Administrative Director of Senior Services and opened several hospital-based Skilled Nursing Units. O'Donnell has extensive experience in leadership, case management, and utilization review, including implementation of industries best care management models that serve across the care continuum. She has authored several articles and has spoken at national conferences.

### COURSE MATERIAL:

Attendees can purchase the text at the HCPro.com store or Amazon.

<https://hcmarketplace.com/contemporary-utilization-review>





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REGISTER ONLINE AT: <https://lhaonline.org/Event.aspx?EventKey=M2307001>

**DATE/TIME:**

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**PRICE:**

- Hospital Member: \$195 (Per Person Rate)
- Associate/Corporate & Attorney Member: \$250 (Per Person Rate)  
(2023 dues must be up to date to qualify for this discounted rate.)
- Non-Member Hospital: \$400 (Per Person Rate)

**REGISTRATION:**

Registrations are accepted online only, and VISA, Master Card, Discover, and American Express are accepted. Email confirmations will be sent to registrant upon completion of registration. Program material and access information are not meant to be shared with anyone other than registered participants. This is intellectual property of the speakers and as such, is intended only for those who registered and participate in the seminar. Sharing of this information with others within your organization will result in an additional registration fee.

**CANCELLATION POLICY:**

Individuals who cancel **more than seven business days prior to a scheduled event** will be charged a cancellation fee of \$50 per person. Written notice of the cancellation must be emailed to [marthur@lhaonline.org](mailto:marthur@lhaonline.org). No refunds will be issued for cancellations received **within seven business days of the event or for no-shows**.

**SUBSTITUTION POLICY:**

Registrants who are unable to participate in an LHA educational event are permitted, and encouraged, to have an eligible substitute; however, written notice of the substitution must be emailed to [marthur@lhaonline.org](mailto:marthur@lhaonline.org) **at least seven business days in advance of the event**. The substitution option is not available if written notification is received by the LHA less than seven business days prior to the scheduled program.

**ACCOMODATIONS:**

Please contact the LHA if you have a disability that may require special accommodations for this educational opportunity. The LHA is committed to ensuring full accessibility for all registrants.

**LHA Code #M2307001**