



# HIPAA Collaborative of Wisconsin Winter Conference

## “FOR THE LOVE OF EHR and NPI”

February 17, 2006

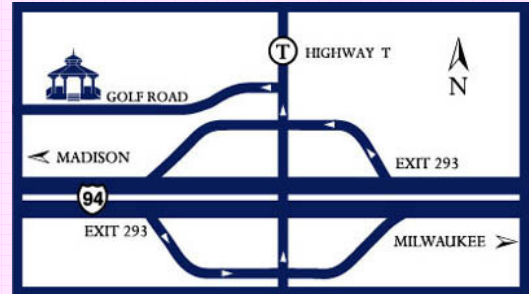


### PROGRAM SUMMARY

- 8:00-8:30 Registration & Continental Breakfast
- 8:30-8:45 Welcome & Introductions
- 8:45-10:00 Session 1 EDI or Privacy/Security
- 10:00-10:10 Break
- 10:10-11:15 Session 1 Discussion
- 11:15-12:00 Lunch
- 12:00-1:00 Session 2 EDI or Privacy/Security
- 1:00-1:30 Session 2 Discussion
- 1:30-1:45 Break
- 1:45-2:30 Session 3 EDI or Privacy/Security
- 2:30-3:15 Discussion on Session 3
- 3:15-3:30 Wrap up

### The Country Springs Hotel

2810 Golf Road  
Pewaukee, WI 53072  
262-970-5411



From Milwaukee: I-94 West to Hwy T; 1/4 mile to Golf Road; West on Golf Road to the Country Springs Hotel  
From Madison: I-94 East to Hwy G (Exit 291); North on Hwy G to Golf Road; East on Golf Road about 1/2 mile to the Country Springs Hotel.



Please circle the breakout you will attend in each session:

- Session 1: Security/Privacy: Legal Considerations for EHR Implementation  
EDI: The Ins and Outs of NPI
- Session 2: Security/Privacy: Practical steps taken by a large Organization to implement an EHR  
EDI: The Minnesota HIPAA Collaborative Initiatives to Plan and Implement the NPI
- Session 3: Security/Privacy: Assisting the small physician practice in the implementation of an EHR  
EDI: Case studies on NPI implementation from a provider's and payer's perspective



**\$100 Early Bird Registration** - postmarked or faxed on or before **Friday, February 3, 2006**

**\$125 Registration** after February 3, 2006

Method of Payment:

- Check - Payable to HIPAA COW
- Credit Card (Visa or MasterCard)  
credit card # \_\_\_\_\_  
expiration date \_\_\_\_\_  
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Send payment & registration to:  
HIPAA COW  
Attn: Wendy Ellwein  
P.O. Box 372  
Watertown, WI 53094  
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Name \_\_\_\_\_ Email Address \_\_\_\_\_  
Organization \_\_\_\_\_ Title \_\_\_\_\_  
Phone Number \_\_\_\_\_ Mailing Address \_\_\_\_\_

\*\*\* This conference may apply toward continuing education credits. Please contact your accrediting organization for application information .

## **Privacy/Security Session 1 - Legal Considerations for EHR Implementation**

This presentation will review the relevant state and federal requirements for a legal healthcare record and how these requirements impact EHR implementation. We will explore the need to define ownership of the components of the EHR, define control and legal duties which attach with ownership. We will explore the requirements that must be met for sharing access to the EHR and required processes for privacy and security. We will then explore specific scenarios related to legal issues that are common to implementation of the EHR such as formation of a RHIO, providing access to non-ownership entities and providing access to patients.

### **Susan Manning, J.D., RHIA**

Susan has over 20 years of experience in the health care field and has performed physician practice evaluations and coding reviews in a variety of health care facilities. Her expertise is in health information management and she has worked extensively on state and national legislation on confidentiality of health care information. Susan has been an instructor in workshops on documentation, coding, compliance, and legal guidelines for medical records. She is an attorney focusing on health law and is a member of the State Bar of Wisconsin. Susan is a Registered Health Information Administrator and a member of the American Health Information Management Association for which she serves on the National Task Force on Compliance. She is a Certified Professional Coder and a member of the American Academy of Professional Coders and its Madison Chapter.

## **Privacy/Security Session 2 - Practical Steps Taken by a Large Organization to Implement an EHR**

- Vendors and EHR
  - Discuss approaches to communicate and implement various security designs into an EHR
  - Discuss implications associated with patients exercising HIPAA rights and the EHR
  - Discuss implications of sharing data within a corporation but across state lines
- Users & EHRs
  - Discuss the various confidentiality breaches that occur by users of EHRs and how education can reduce those incidents
  - Recognize that consumerism in healthcare will include confidentiality
  - Identify strategies to implement a Proactive Audit Methodology

### **Eric Klavetter, J.D., Compliance & Privacy Officer, Mayo Clinic - Rochester**

Eric has been with the Mayo Clinic since 2001. During this time, he has also served as the Information Security Administrator, the Privacy Officer & Compliance Coordinator as well as his current position. Eric has been instrumental in developing and managing the institutional compliance program, policies, standards and guidelines. Eric is the key liaison between IT, HR Legal, Administration, Research, Education and patients in regards to compliance and privacy issues within Mayo. Eric holds a J.D. and a M.S. in Administrative Studies, Health Emphasis from the University of South Dakota. He has played a key role in the implementation of EHR's at Mayo, and an MA in Health Information Management. He is a published author of various HIPAA Privacy, Security, TCS, and Compliance topics.

## **Privacy/Security Session 3 - Assisting the Small Physician Practice in the Implementation of an EHR - What's Different?**

MetaStar works with a number of physician practices to assist in implementation of the electronic health record. Many of the practices are small 1-3 physician organizations. These organizations do not have extensive infrastructure to assist in the selection, implementation and training required to successfully install and sustain an electronic health record. This presentation will focus on assistance provided to the small physician practice in order to offer the interim resources required to bring the project to a timely completion. Emphasis will be placed on practice assessment, office redesign, training of the office staff and selection of the electronic health record application.

### **William R. French, M.B.A., B.S., R.H.I.A., C.P.H.Q., Vice President, eHealth Strategies MetaStar, Inc.**

Mr. French has over 27 years experience in managing health information in the inpatient and ambulatory acute care setting. As MetaStar's Vice President of eHealth Strategies, he leads two Medicare contracted projects, Doctor's Office Quality Information Technology (DOQ-IT) and Systems Improvement Organizational Culture Change (SIOC), which assist physician offices and hospitals to adopt electronic health records, computerized physician order entry (CPOE), bar-coding and telehealth technologies. Mr. French also developed and staffed a Medicare contracted program to reduce payment error through accurate assignment of Diagnosis Related Groups (DRGs) and placement of the patient in the setting appropriate to the patient's severity of illness. Mr. French has held senior information management level positions in seven acute care facilities ranging from 200 to 1000 beds and ambulatory census of over 500,000 visits a year. Areas of responsibility included development of information systems to record medical documentation and provide it to multiple locations for continuity of patient care, appropriate payment and quality of care improvement. He has extensive program level experience in utilization management and quality improvement programs.

## **EDI Session 1 - The Ins and Outs of NPI: Enumeration, Dissemination, Impacts Outside of EDI, Project Planning, Subparts and NPI specific Updates**

Dr. Suarez will provide the basics around the NPI, including the core elements of the final NPI Rule and key planning and implementation concepts. As the Co-chair to the WEDI NPI Workgroup efforts and Chair of the Steering Committee of WEDI's National Provider Identifier Outreach Initiative (NPIOI), Walter will share with Roundtable participants some insights on what is happening within the industry with NPI efforts.

## **Walter G. Suarez, MD, MPH**

Dr. Suarez is a physician and a public health and medical information systems specialist, and President and CEO of SGA, LLC and the Midwest Center for HIPAA Education (MCHE). SGA/MCHE is a Minnesota-based health care education and research company established in 2002 to assist health care organizations plan, manage and implement large-scale projects in the areas of quality measurement, patient safety, health disparities and HIPAA. Before establishing SGA, Dr. Suarez was the Executive Director and CEO of the Minnesota Health Data Institute, a non-profit, public-private partnership. He is a Founding Member and President of the Public Health Data Standards Consortium; member of the National Uniform Claims Committee, the Workgroup on Electronic Data Interchange (WEDI), the WEDI Strategic National Implementation Process (WEDI/SNIP), and the recently created WEDI NPI Outreach Initiative, where he serves as Co-Chair of the Steering Committee. Dr. Suarez is a frequent writer, lecturer and speaker to university, business, government and health care groups on a variety of issues related to health disparities, quality measurement, data privacy, and HIPAA administrative simplification. Over the past four years, Dr. Suarez has delivered more than 120 one-day and half-day provider workshops, seminars and training programs in Minnesota, the Midwest and throughout the country. Dr. Suarez received his M.D. degree from the Colombian School of Medicine in 1985, and his Master in Public Health from Tulane University in 1986.

## **EDI Session 2 - The Minnesota HIPAA Collaborative Initiatives to Plan and Implement the NPI**

Planning and implementing the new National Provider Identifier (NPI) will require close communication, collaboration and coordination between providers, payers, clearinghouses and vendors at the regional and local level. This session will highlight the Minnesota HIPAA Collaborative initiatives underway to ensure the successful adoption, transition and implementation of the NPI. Special emphasis will be placed on the key planning steps and coordinating areas, including enumeration guidelines, establishment of common timelines for transition, communication of NPI information, and other aspects of the transition to the NPI which should be considered. From this session, HIPAA COW may learn of ways to help within the state of Wisconsin in moving forward with the NPI.

## **Tom Polhemus - Principal Operations Architect, Blue Cross Blue Shield of Minnesota**

Tom Polhemus has been involved in healthcare EDI, medical outcomes analysis and other aspects of healthcare IT for over 20 years. He is currently a member of the Blue Cross Blue Shield of Minnesota HIPAA Program Management Office and has been working on implementing many of the HIPAA mandates within BCBSMN and its affiliate organizations. He also serves as a BCBSMN representative to the Minnesota HIPAA Collaborative, which is a joint effort of the state's largest payers and providers. He chairs or co-chairs a number of the Collaborative Workgroups to establish a community-based approach to implementing HIPAA standard transactions, connectivity and security, and most recently a coordinated approach to transitioning to the National Provider Identifier.

## **Michael J. Ubl**

Mike Ubl has been with Blue Cross and Blue Shield of Minnesota over 30 years. In that time, he has served in a variety of technical and management positions within the company. Mr. Ubl is currently responsible for the implementation of federal regulations associated with the "HIPAA - Administrative Simplification (HIPAA-AS)" at Blue Cross Blue Shield of Minnesota. Mike has also been involved with a consortium of providers and health plans in Minnesota that is continuing to work on strategies to implement community based solutions that support the HIPAA regulations regarding transactions, code sets, and unique identifiers. Mike is currently on the Board of Directors for Workgroup for Electronic Data Interchange (WEDI). He serves as a Vice-Chair of Programs/Services, a Co-Chair on the WEDI Education Committee and is on the steering committee for the National Provider ID Outreach Initiative (NPIOI). More recently, Mr. Ubl has been actively involved with various healthcare industry groups focused on the federal government's National Health Information Network (NHIN) vision as well as participating on the Minnesota e-Health Initiative as a co-chair for the Technology Standards Workgroup. He also served as a Co-Chair of the Standards & Technology workgroup of the Minnesota e-Health Initiative in 2004 and 2005.

## **EDI Session 3 - Case Studies on NPI Implementation from a Provider's and a Payer's Perspective**

How the NPI will impact internal systems and external communications and trading partner relationships will be different for providers, payers and their trading partners. This session presents case studies from Aurora Health Care and the Department of Family and Health Services (DHFS - WI Medicaid) on how they are preparing organizationally, administratively and systems-wide, to adopt, transition, and implement the new NPI. Special attention will be paid to the steps taken by organizations to organize their resources to address the NPI, assess their NPI needs, and identify internal and external systems that will be affected by the NPI.

## **Jean Feinstein-Lyon, Chief of Systems & Reporting, DHHS, Div of HealthCare Financing**

Jean has over 20 years of experience working in the Wisconsin Medicaid Program in policy, systems and operations. She is currently Chief of Systems and Reporting with responsibilities including oversight of the Fiscal Agent/MMIS contract, managed care systems and federal reporting. Jean was previously HIPAA Project Manager for health care programs administered by the State Division of Health Care Financing, including Medicaid, BadgerCare and SeniorCare, and is currently on the Project Management team for implementation of a new MMIS.

## **Suzanne Stewart, Aurora Health Care, EDI Coordinator**

For the past seven years, Suzanne has been employed and worked with various healthcare entities ranging from health plans, clearinghouses and providers. Her duties have ranged from EDI Analyst, HIPAA Compliance Officer, Health Care Consultant to Project Manager. She has a Bachelor's Degree in Office Systems and Technologies from the University of Wisconsin-Whitewater's Business School. Suzanne has been at Aurora Health Care, for the past 3 years and in her current role at Aurora Health Care as the EDI Coordinator, she works very closely with related Revenue Cycle Initiatives. She is the project lead for the National Provider Identifier project, handles compliance items with the HIPAA TCS and coordinates EDI projects across the system with new electronic transactions such as Eligibility and Claim Status Inquiry. Suzanne actively participates in WEDI SNIP, recently as a co-chair for the NPI Subparts Sub Workgroup and assisting with other NPI Whitepapers. Suzanne is also the HIPAA Collaborative of Wisconsin (HIPAA COW - a WEDI Regional Affiliate) EDI Taskforce Co-chair and board member. She has presented at conferences regarding ROI with EDI, NPI Subparts and other HIPAA related topics for various organizations and associations.

## **Lu Anne Green, Project Manager, Electronic Data Systems**

Lu Anne is the project manager for Wisconsin Medicaid's NPI implementation and one of several project managers for Wisconsin Medicaid's new system implementation. Previously, Lu Anne served as the project manager for the implementation of the HIPAA transactions and code sets. Lu Anne has been employed by EDS for 20 years, in a variety of technical and management positions. She has dedicated 19 of the 20 years to the Wisconsin Medicaid industry. Lu Anne holds a Bachelor of Science degree in Computer Science from Michigan Technological University.