



Pennsylvania Coalition of Affiliated  
Healthcare & Living Communities

## 2024 Fall Summit

September 16 – 17<sup>th</sup>

ZOOM

### Monday, September 16, 2024

9:30 – 10:30 a.m. - General Session (1 CEU)

#### Transparency Issues for Long Term Care Providers

Federal and state governmental agencies are seeking increased transparency in the ownership and operations of health care providers, particularly in the long-term care sector. Both levels of government have imposed significant and new disclosure issues for providers, from Pennsylvania licensure, Medicare and Medicaid certification perspectives. Regulatory agencies are now requiring far more disclosure relating to the ownership and control structure of providers, the individuals who run the day-to-day operations (e.g. administrators, DONs, Medical Directors), members of the provider's governing body, along with far more scrutiny with respect to the financial condition of the operator. These reporting obligations are backed by additional enforcement options available to the regulatory agencies. This session is intended to review these various requirements, so that providers can prepare for and comply with the various disclosure requirements imposed by government.

*David C. Marshall, Esq., Managing Shareholder*

*Latsha Davis & Marshall, P.C.*

10:45 – 11:45 a.m. – General Session (1 CEU)

#### The New Overtime Rule: Avoiding Investigation and Misclassification

The Federal Department of Labor's ("DOL") Final Overtime Rule raised the Fair Labor Standard Act's minimum annual salary requirement for exempt employees in a 2-phase process. The first phase went into effect on July 1, 2024, and phase 2 will go into effect on January 1, 2025. The changes may expand overtime eligibility for many workers, and will require employers to evaluate their pay scale, job descriptions, job classifications, and exemptions. Organizations that fail to appreciate the new Rule and salary thresholds may open themselves to DOL audits, investigations, and lawsuits, which can be both time-consuming and costly. This session will be a nuts-and-bolts session covering not only the Rule changes, but the questions an organization must answer and the information it must understand to be compliant. Speakers will draw upon real-life experiences and provide examples to illustrate best practices and liability avoidance.

*Andrew P. Dollman, Esq., Shareholder & Chair, Employment and Labor Law Group, Litigation Group, and Workers' Compensation Defense Group*

*Latsha Davis & Marshall, P.C.*

1:15 – 2:15 p.m. – General Session (1 CEU)

#### Senior Living Industry Update and Strategic Planning Discussion

There are many developments happening within the senior living industry that are affecting the day-to-day operations and long-term strategies of organizations. With staffing shortages,

declining census numbers, industry consolidations, and changing regulations, there are many considerations for executives to think about that will impact the direction of their organization. Add in the most recent changes – as well as proposed changes – to reimbursement rules on the national and local level, and organizational leaders have even more to think about that will impact their organization’s financial performance.

Join Baker Tilly for an educational presentation where our team of senior living specialists will discuss recent events within the industry. In addition to giving an industry outlook, we will be discussing all things reimbursement, including the most recent Centers for Medicare & Medicaid Services (CMS) Fiscal Year (FY) 2024 Skilled Nursing Facility (SNF) Prospective Payment System (PPS) rule, reflecting on the Patient-Driven Payment Model (PDPM) in contrast to the RUG-based methodology. We will also be discussing how to minimize risk through compliance requirements by utilizing auditing and monitoring tools to capture supportive documentation, review status of the CMS 5 Claim SNF Probe and Educate audits, share insights on Payroll-Based Journal (PBJ) audits, as well as providing benchmarking analysis to identify operational outliers as it relates to the revenue cycle.

Session Learning Objectives:

1. Discuss current developments and trends within the industry.
2. Understand how to optimize reimbursement opportunities.
3. Discuss simple steps to minimize organizational risk by understanding compliance requirements.

*Michael Kessler, CPA, CGMA, Principal, Health Care Services  
Baker Tilly US, LLP*

*Brandon Harlan, CPA, Health Care Services  
Baker Tilly US, LLP*

2:30 – 3:30 p.m. – General Session (1 CEU)

#### The PBJ and Finance’s Role in a Successful Survey

Payroll Based Journalling (PBJ) has long been thought as a process relegated to the offices of the finance department. However, CMS surveyors have started taking deeper dives into PBJ data to support their findings around staffing and quality. But, surveyors are not always familiar with PBJ data or how to correctly analyze and interpret it. This session will discuss how your finance team, in conjunction with your clinical practitioners, can better prepare themselves for a PBJ data review by regulators. The presenters will provide real world examples, from actual survey experiences, of what kinds of data surveyors are requesting, and how they are attempting to utilize it. Through these experiences, the presenters will offer best practices on how finance and operations team members can work together to improve the survey experience.

*Stephen C. Ryan, CPA, Director and Chief Financial Officer  
LW Consulting, Inc.*

*Dianne Gattorno, President  
CHR Consulting Services, Inc.*

## **Tuesday, September 17, 2024**

8 – 9 a.m. - General Session (1 CEU)

### Empowering Administrators and CFO's: Leveraging Social Determinants for Stronger Hospital Partnerships in the Post-Acute Space

This hour-long session aims to equip executives with the knowledge and tools necessary to understand and leverage the impact of social determinants in the post-acute space. By delving into the complexities of social determinants and their effects on patient outcomes, attendees will learn how to enhance their facilities' capabilities and become stronger partners to hospital referral sources. Through this session, participants will gain insights on building meaningful relationships with hospitals, optimizing patient care, and ultimately driving improved outcomes in the post-acute care continuum.

*Amy Hancock, CEO and Founder  
Advantage Home Health and Hospice*

9:15 – 10:15 a.m. – General Session (1 CEU) \*\*\*

### Pennsylvania Emergency Preparedness

This one-hour credit hour course will identify the principles of the Pennsylvania Emergency Preparedness Guide tailored to Nursing Home and Assisted Living Facilities. The course will identify for the participants being prepared and being involved.

Based on the Department's ten most identified threats the course will identify those risks and preparations for those potential emergencies.

*Thomas Micozzie, Owner  
Project Development Resources*

10:30 – 11:30 a.m. - General Session (1 CEU)\*\*\*

### A Dose of Immunization Information

This session will be a comprehensive dose of immunization information! Topics of focus will include the vaccine approval & recommendation process in the United States, nursing facility requirements & quality measures related to immunizations, how to incorporate vaccination into the antimicrobial stewardship program, CDC immunization schedule for people over the age of 65, and ways to screen for vaccine eligibility. With so many new and updated vaccines indicated for older adults, don't miss your shot to catch this session!

*Dr. Emily Kryger, PharmD, BCGP, FASCP, Owner & Consultant Pharmacist  
PharmRecs, LLC*

11:45 a.m. – 12:45 p.m. – General Session (1 CEU)\*\*\*

### OSHA Regulatory Compliance and Responding to an OSHA Survey

OSHA scrutiny towards the senior care industry has grown, and the fines and penalties associated with long-term care citations are becoming more expensive. This session will examine the three components that facilities and facility counsel need to consider when examining OSHA regulations and OSHA citations for long-term care facilities. These three components will include: the rules and regulations concerning a facilities state of preparedness with OSHA inspections, how and what facility leadership and facility counsel should respond to

an OSHA survey and/or citation, and what actions should counsel and facility leadership do and expect after an OSHA survey.

*Steve Wilder, BA, CHSP, STS, Senior Consultant & CEO  
Sorensen, Wilder & Associates*

*\*\*\*Eligible for infection prevention or emergency preparedness CEUs to fulfill the requirements of the State Board of Examiners of Nursing Home Administrators*